

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), T Tariq (Deputy Leader and Cabinet Member for Health and Adult Care) and L Smith (Deputy Leader and Cabinet Member, Children and Young People)

Dear Member/Colleague

Cabinet

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

Date:	Wednesday, 13 March 2024
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 Monday, 11 March 2024. 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 Friday, 8th March 2024.

5 MINUTES *(Pages 5 - 14)*

Minutes from the meeting held on 14 February 2024 are attached.

6 ADULT SOCIAL CARE PROVIDER FEE UPLIFTS 2024/25 *(Pages 15 - 26)*

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

7 ANNUAL REVIEW OF ADULT SOCIAL CARE FEES AND CHARGES FOR THE FINANCIAL YEAR 2024/25 *(Pages 27 - 32)*

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

8 ADULT SOCIAL CARE PERFORMANCE QUARTER THREE REPORT 2023/24 *(Pages 33 - 56)*

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

9 PROPOSED REVIEW OF THE PERSONA SHAREHOLDER AGREEMENT *(Pages 57 - 60)*

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

10 EXPANSION OF SOLAR PV ON COUNCIL ASSETS

This item has been WITHDRAWN from the agenda.

11 QUARTER 3 BUDGET MONITORING REPORT *(Pages 61 - 96)*

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

12 PROPOSED REDEVELOPMENT OF THE ELMS FOR THE DELIVERY OF ACCOMMODATION FOR OLDER PEOPLE *(Pages 97 - 102)*

Report of the Cabinet Member for Housing Services is attached.

13 PROCUREMENT OF WATER HYGIENE MONITORING SERVICES FOR THE PREVENTION OF LEGIONELLA AWARD RECOMMENDATION - PART A *(Pages 103 - 106)*

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

14 ADOPTION OF MILL GATE REGENERATION FRAMEWORK *(Pages 107 - 236)*

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

15 GIGG LANE STADIUM *(Pages 237 - 244)*

Report of the Cabinet Member for Culture, Economy and Skills is attached.

16 APPOINTMENTS UPDATE *(Pages 245 - 248)*

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

17 MINUTES OF ASSOCIATION OF GREATER MANCHESTER AUTHORITIES / GREATER MANCHESTER COMBINED AUTHORITY *(Pages 249 - 274)*

To consider the minutes of meetings of the Greater Manchester Combined Authority held on 26 January 2024 and 9 February 2024.

18 URGENT BUSINESS

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

19 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.

20 PROCUREMENT OF WATER HYGIENE MONITORING SERVICES FOR THE PREVENTION OF LEGIONELLA AWARD RECOMMENDATION - PART B *(Pages 275 - 278)*

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

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Minutes of: CABINET

Date of Meeting: 14 February 2024

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

Also in attendance: Councillors R Bernstein and M Smith

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

Apologies for Absence: None received.

CA.119 APOLOGIES FOR ABSENCE

Apologies for lateness were received from Councillor Charlotte Morris.

CA.120 DECLARATIONS OF INTEREST

Councillor Charlotte Morris declared an interest in respect of 11 – Simister Island Development Consent Order owing to her employment by National Highways, and undertook to not participate in the discussion or vote for that item.

CA.121 PUBLIC QUESTION TIME

The following question was submitted in advance of the meeting by a member of the public, Karen Simpson:

Further to my question posed in the last Council Meeting regarding the clause in the lease that states we are entitled to Quiet Enjoyment – which to date has not been answered as Charlotte Morris said she needed to 'gen up' on the terminology as she was not familiar with it, and I haven't heard anything since.

Would you now agree that you have indeed broken the terms of the lease in light of the findings that there has been a known fault with the Market Hall roof, since 1984? And that a special coating had to be applied every 5 years, yet no evidence can be found of this being done?

For info - Quiet Enjoyment is a clause in all our leases - broadly speaking, it entitles us to conduct our businesses without interruption or interference.

Responding, Councillor Morris reported that this question focussed on whether this constituted a break in the lease, and the straight answer was no. The Quiet Enjoyment clause had been looked into, it was a standard part of leases of this nature and meant that the trader has the right to use and occupy their stall in normal circumstances. However, these were not normal circumstances; when RAAC was confirmed in October an immediate decision was needed to close the market hall and constituted special circumstances. Legal advice had been sought and this was the Council's position.

Councillor Morris advised that the Council was continuing to do all it could to support people. This had been a very difficult situation for everybody; it had been a difficult but necessary decision by the Council and we want to do our best by the traders. More

clarity on the long-term picture was expected in the coming weeks, with final results of testing awaited, at which point timescales for reopening will be understood and communicated.

A further supplementary question was submitted:

So, to clarify you are saying that even though it's come to light that this issue has been known by the Council as a body since 1984, you are not responsible for what's happening now?

Councillor Eamonn O'Brien responded that no, this was not what the Council was saying about the issue of the roof. Most roofs will require regular maintenance but the Council were not aware that RAAC was used in the construction of the Market Hall until this was confirmed on Thursday 26 October 2023 following the outcome of a survey conducted by external specialist building surveyors.

Ms Simpson added that a fault in the roof was identified in 1984 and a special costing should have been applied every 5 years (and was not done so).

Councillor O'Brien advised that the position of the Council was that they don't accept this was the case without further research into the context and confirming the details involved. If there was a fault in 1984, that may be entirely separate from the problems faced today and more clarification was needed.

Councillor Morris added that she understood and appreciated frustrations, but the Council didn't know RAAC was present until October last year and couldn't change the situation now. More research would be done into the 1984 issue but it didn't change the position we were in now in relation to RAAC and this closure.

The following question was submitted at the meeting by a member of the public, Gary Simpson:

It is now mid-February, the time Council officials said we would be fully debriefed on the findings of the various investigations taking place on the market roof. No meeting has been called to relay this information – where are the results?

Responding, Councillor Morris reported that we had received the main condition survey part done but there were final details that needed to come through with regards to testing of the materials. This had to be done in a laboratory by a third party and the Council had no control over their timescales, which were longer than initially quoted. Once that work was complete a full briefing would take place.

The following question was submitted at the meeting by a member of the public, Steve Maloney:

1979 was the last time the Bury Market roof was coated; in 1984 it came to a Council meeting that they didn't have funds available (£10,000) and was to be considered at the following meeting which we do not have records for. As far as I'm aware, the maintenance in place was to be recoated every 5 years. In light of the findings that the

fault with the roof was established in 1984 and last treated in 1979, the fact that no evidence has been found that the RAAC was either or checked treated in the intervening years, would you agree that you have failed in your duty of care to both the traders and the public and, as such, a clear case of negligence can be established?

Responding, Councillor Morris reported that there was obviously a lot of historic details coming to light about what did or didn't happen in the maintenance of the roof, and it was important for us to understand that. She advised that, to her understanding, the current position was that even if all the maintenance had been carried out, the simple presence of RAAC would still have required the closure of the Market Hall. Councillor Morris advised that she appreciated the need to get the facts right on historic records, but the presence of RAAC made it hazardous and dangerous.

With regards to whether RAAC would be dangerous if coated, Councillor O'Brien advised that it was something that would be clarified through the ongoing investigations. He asked traders to continue sharing information with officers and with Councillors, and reiterated that information would be shared as soon as it was available.

CA.122 MEMBER QUESTION TIME

There were no Member questions.

CA.123 MINUTES

It was agreed:

That the minutes of the meeting held on 10 January 2024 be approved as a correct record.

CA.124 HOUSING REVENUE ACCOUNT BUDGET REPORT

Councillor Richard Gold, Cabinet Member for Finance and Communities, presented the report which established the Housing Revenue Account budget for 2024/25. It proposed an increase in rent levels of 7.7% (which was the Government's maximum allowable increase being September CPI (Consumer Price Index) 6.7% plus 1%) with effect from 1st April 2024, an increase in shared ownership rents by 7.7%, and an increase for other charges and rents by 6.7% (in line with CPI as at September 2023). It was noted that this report had been considered by Overview and Scrutiny Committee as well as Union meetings.

In response to questions it was noted that hardship funds were in place to support tenants on housing benefits and universal credit. These differed based on whether funds were paid to the tenant or the landlord, and the Council was working with tenants to help them according to their circumstances.

Decision:

Cabinet approved the following and commended it to the Council:

- Approved the 2024/25 budget for the Housing Revenue Account

- Agreed rents to be increased for 2024/25 by 7.7% which is the Government's maximum allowable increase being September CPI (Consumer Price Index) 6.7% plus 1% with effect from 1st April 2024.
- Agreed that shared ownership rents to be increased by 7.7% in line with the provision which is set out within shared ownership agreements with effect from 1st April 2024.
- Approved an increase in Garage rents by CPI as at September 2023 CPI 6.7%.
- Approved an increase in Sheltered Management and Support Charges by CPI 6.7%.
- Approved an increase in Service and Amenity Charges by CPI 6.7%.
- Approved an increase in Support and Heating charges by CPI 6.7%.
- Approved an increase in Furnished Tenancy charges by CPI 6.7%.

Noted that where a social rent property is re-let to a new or transferring tenant the rent level will be increased to the target rent for that property.

Noted that, in accordance with the Rent Standard, where an affordable rent property is re-let to a new or transferring tenant the rent level be set by reference to 80% of the market rent (including service charges where applicable) for a similar property at the time of letting or the formula rent for the property, whichever is the greater.

Reasons for the decision:

To progress the Council's budget setting process to achieve an approved and balanced budget.

Other options considered and rejected:

None.

CA.125 THE COUNCIL'S REVENUE BUDGET AND THE MEDIUM TERM FINANCIAL STRATEGY

Councillor Richard Gold, Cabinet Member for Finance and Communities, presented the Council's 2024/25 budget proposals and the framework for the longer-term Medium Term Financial Strategy (MTFS) 2024/2027. The report also set out the process that will lead to the agreement of the budget and the setting of the 2024/25 Council Tax at Full Council on the 21 February 2024.

The full suite of documents presented also included:

- Council Tax Setting
- Capital strategy 2024/25 to 2026/27
- Treasury Management Strategy 2024/25
- The Dedicated Schools Grant and the schools' budget 2024/25

It was noted that this had been considered by Overview and Scrutiny Committee as well as Union meetings.

An increase of 2.99% to Council Tax was being proposed along with a 2% adult social care precept, and the Medium Term Financial Plan reported a budget gap for 2025/26 of £10.627m and 2026/27 of £4.327m, bringing a cumulative three-year budget gap of £30.085m.

Councillor Gold advised that a recommendation regarding the treatment of military compensation was in response to the British Legion campaign, but also added discretionary housing support in addition to their proposals.

Members noted the challenging times and the changes made in Bury over the last 12 months, including the work of the Financial Improvement Panel and the associated financial improvement plan. It was noted that the Budget gap had reduced since December, from £17.243m to £15.131m (this took) account of approved savings of £5.368m). Work was underway to identify additional savings to deal with the further gap and, pending this, the gap will be funded through the use of reserves. Councillor Gold advised that c1.7m had also been announced from the government, which had not been in time to be included in these papers but would be reflected in Quarter 1 reports.

Members discussed the core spending power of the Council noting that although it was very slightly higher than the national average, Bury had been in the lowest 20% for funding and had received 17% increase in demand as well as £11m inflationary costs, which outstripped spending power. With regards to previous savings targets, 93% of these had been achieved and a plan to substantially reduce the remaining 7% would be received in Quarter 1. Officers advised that once previous savings targets had been delivered, work in Children's Services would continue to address budget concerns before work on the Council's balance sheet would begin to release assets where possible.

Decision:

Cabinet approved the recommendations and commended them to Council:

1. Approved the Medium-Term Financial Strategy for 2024/ 2025, 2026 / 2027 and the assumptions regarding resources and spending requirements.
2. Approved the Council Tax base for Bury Council for 2024/ 25 of 57,409 Band D equivalent dwellings, this is the basis on which the Council Tax funding has been calculated.
3. Approved the net revenue budget of £209.608m for 2024/2025.
4. Approved the Council tax requirement of £110.198m and the increase in Council Tax in 2024 – 25 of 2.99% in terms of General Council Tax and a further 2% for the Adult Social Care precept for 2024/2025.
5. Approved the budget assumptions £37.111m in 2024/25.
6. Approved the use of £15.131m of reserves from the budget smoothing reserve and £4.629m from the collection fund smoothing reserves.
7. Noted the forecast position on reserves (paragraph 22.2).
8. Noted the Chief Executive as Director of BMBC Townside Fields Limited will draw down annual dividends from the Company and annual dividends will be reflected in the MTFS.
9. Approved the recommendations set out in the Treasury Management Strategy (Appendix 2):
 - Approved the Treasury Management Strategy including the associated Prudential Indicators and Annual Investment Strategy.
 - Approved the Treasury Management Policy Statement.
 - Approved the Minimum Revenue Provision (MRP) Policy Statement.
10. Approved the Capital Strategy and the Programme for 2024/25 - 2026/27 (Appendix 3).

11. Approved the Dedicated Schools Grant budget for 2024/2025 at £228.326m and approve the allocations between the four funding blocks as set out in appendix 4 to this report:
 - The Schools and Academies 2024/25 funding unit values as recommended by Schools Forum and detailed at Annex 1 to appendix 4.
 - Approved the 2024/25 hourly rates for all early year's providers as follows:
 - £5.28 per hour, for 3- and 4-year-olds.
 - £7.52 per hour, for 2-year-olds; and.
 - £10.00 per hour, for under 2s
12. Noted the position on the Dedicated Schools Grant deficit and Project Safety Valve.
13. Agreed to the following amendments to the treatment of military compensation as set out in Appendix 7:
 - Exclude military compensation for Discretionary Council Tax Support calculations - These are short to mid-term additional credits made to those in receipt of Council Tax Support as a top up towards their Council Tax.
 - Exclude military compensation for Discretionary Housing Payments calculations - These are short to mid-term additional payments made to those in receipt of Housing Benefit or Universal Credit as a top up towards their rent.

Reasons for the decision:

To progress the Council's budget setting process to achieve an approved and balanced budget.

Other options considered and rejected:

None, setting the budget is a statutory responsibility.

CA.126 QUARTER THREE CORPORATE PLAN PERFORMANCE REPORT 2023/24

Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs and HR, presented the performance and delivery monitoring report for Quarter Three against the Corporate Plan for 2023/24. It contained full updates in terms of both the delivery against the priorities set out in the Corporate Plan and associated key performance indicators. A RAG rating and percentage completion had been introduced against each objective, and Members thanked officers for the improvement in these reports.

Decision:

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

Reasons for the decision:

N/A

Other options considered and rejected:

N/A

CA.127 REPORT BY THE LOCAL GOVERNMENT AND SOCIAL CARE OMBUDSMAN (21 011 785 / 23 005 479 / 22 011 825)

Councillor Lucy Smith, Cabinet Member for Children and Young People, presented the report which set out the findings by the Local Government & Social Care Ombudsman (LGO) made against the Council following the Council's failure to comply with agreed recommendations following two earlier investigations, and the action now taken by the Council to demonstrate that it has complied with those recommendations. Members noted that this complaint related to the Council's failure to provide appropriate free transport and repeated failure to remedy the situation within agreed timescales.

In response to questions relating to this item and the subsequent item, Councillor Lucy Smith gave assurances that these related to historic complaints and since this time stronger policies and processes had been introduced which clarified staffing leads. It was also noted that the Monitoring Officer was meeting on a three-monthly basis with the LGO which would ensure issues like this would not reoccur.

Decision:

Cabinet noted the recommendations made by the Local Government & Social Care Ombudsman, specifically the concerns expressed about the Council's failure to implement remedies within a reasonable timeframe.

Reasons for the decision:

The Council must consider the report and confirm within three months the action it has taken or proposes to take. The Council should consider the report at its full Council, Cabinet or other appropriately delegated committee of elected members and we will require evidence of this. (Local Government Act 1974, section 31(2), as amended).

Other options considered and rejected:

None.

CA.128 REPORT BY THE LOCAL GOVERNMENT AND SOCIAL CARE OMBUDSMAN (23 006 024)

Councillor Lucy Smith, Cabinet Member for Children and Young People, presented the report which set out the findings by the Local Government & Social Care Ombudsman (LGO) made against the Council following the Council's failure to comply with agreed recommendations following an earlier LGO investigation, and the action now taken by the Council to demonstrate that it has complied with those recommendations. Members noted that this complaint related to the Council failing to act properly when a child was out of education causing injustice, and the subsequent remedy not being carried out in agreed timescales.

Decision:

Cabinet noted the recommendations made by the Local Government & Social Care Ombudsman, specifically the concerns expressed about the Council's failure to implement remedies within a reasonable timeframe.

Reasons for the decision:

A requirement stipulated by the Local Government and Social Care Ombudsman is that a copy of its report is considered by the Council at its full Council, Cabinet or other

appropriately delegated committee of elected members in accordance with the Local Government Act 1974, section 31(2), as amended.

Other options considered and rejected:

None.

CA.129 SIMISTER ISLAND DEVELOPMENT CONSENT ORDER

Councillor Charlotte Morris declared an interest in this item and did not participate in the discussion or vote on the decision.

Councillor Eamonn O'Brien, Leader and Cabinet Member for Strategic Growth, presented the report which detailed a National Highways scheme to undertake a major infrastructure development to improve Junction 18 of the M60 (Simister Island) and widen to five lanes of the M60 between Junction 17 and Junction 18 to facilitate smoother flows of traffic along the connecting motorways. This was a "Nationally Significant Infrastructure Project" (NSIP) which meant that planning consent for the scheme is determined by the Secretary of State through an application process known as a Development Consent Order (DCO). Members noted that the Council will not decide whether the scheme goes ahead but will automatically be an "Interested Party" and was required to provide evidence within prescribed timetables and, as such, the report recommended appropriate delegations to facilitate this.

Decision:

Cabinet delegated authority to the Executive Director (Growth), in consultation with the Monitoring Officer and Cabinet Member for Strategic Growth, to respond to all consultations and engagement as part of the Simister Island Development Consent Order application process.

Reasons for the decision:

Without delegated authority it is unlikely that the Council will be able to effectively engage with the DCO process. If responses are not submitted in accordance with the statutory timescales, they cannot be taken into account. Without the requested delegation in place, this could result in a recommendation made to the Secretary of State which does not fully take account of impacts upon Bury.

Other options considered and rejected:

- Not to delegate authority. This is not recommended for the reasons set out above.
- Not to participate in the DCO process. This is not recommended for the reasons set out above.

CA.130 BURY COUNCIL FINANCE - FUTURE LEADERSHIP ARRANGEMENTS

Councillor Richard Gold, Cabinet Member for Finance and Communities, presented the report which set out proposals in relation to the future substantive leadership of the Council's Finance function. Members noted it would strengthen the structure of senior finance officers whilst maintaining relevant expertise and ensuring subject matter experts were in place. Proposals had been market tested and similar structures were

in place at other Councils. Members discussed the proposals and noted the cross-party support.

Decision:

Cabinet:

1. Recommended to Council that the vacant post of Deputy Chief Finance Officer (Band E, £93k - £102k) be redesignated as Director of Finance (Band F, £104k - £113k) and redesignated as the Council's Statutory Section 151 Officer. The Director of Finance will be a direct report to the Chief Executive with the Finance function becoming part of the Corporate Core Department under the Executive Director (Strategy & Transformation).
2. Noted that following this appointment the Executive Director (Finance) role will be disestablished.
3. Recommended to Council that the post of Director of People & Inclusion (Band D, £84k - £91k) be re-graded at Chief Officer Band E (£93k - £102k) to reflect the post's expanded portfolio, as set out below. Delegate authority to the Chief Executive and the Cabinet Members for Finance and Communities and HR and Corporate Affairs, in consultation with the Monitoring Officer and S151 Officer, to consider responses received from the consultation and produce a final version of the structure as set out in recommendation 5.
4. Approved the redesignation and re-evaluation of the post of Chief Accountant (Band B, £69k - £75k) to Assistant Director (Finance) (Band D £84k - £91k) as a basis for consultation. This role will take on the duties of the Deputy S151 officer.
5. Agreed in principle the commencement of consultation with affected staff in relation to the changes set out in this report and to delegate authority to the Chief Executive and the Cabinet Members for Finance and Communities and HR and Corporate Affairs, in consultation with the Monitoring Officer and S151 Officer, to consider responses received from the consultation and produce a final version of the structure.

Reasons for the decision:

The proposal sets out the long-term plan for leadership of the Council's Finance function, following the appointment of the Interim Executive Director and within the context of the wider leadership structure within the Corporate Core. In recommending options, consideration has been given to the overall leadership capacity and structure required for the function beyond the S151 role and the benefits of integrating Finance within the Corporate Core Department to ensure the full coordination of all Council back-office functions.

Other options considered and rejected:

It would be possible to maintain the current finance structure and seek to recruit to existing posts on a substantive basis, however the recruitment market has not supported this structure to date.

CA.131 APPOINTMENTS UPDATE

Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs and HR, presented the report which set out changes to appointments since the Council meeting in May 2023 regarding the new Housing Advisory Board, other appointments and vacancies.

Decision:

Cabinet noted the appointments and amendments to appointments made since the Annual Meeting of Council as set out in the report.

Reasons for the decision:

N/A

Other options considered and rejected:

N/A

**CA.132 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 15 December 2023 be noted.

COUNCILLOR E O'BRIEN

Chair

(Note: The meeting started at 6.00 pm and ended at 7.02 pm)



Classification:
Open

Decision Type:
Key

Report to:	Cabinet	Date: 13 March 2024
Subject:	Adult Social Care Provider Fee Uplifts 2024/25	
Report of	Cabinet Member for Health and Wellbeing	

Summary

1. This report details the fee engagement process including timelines and proposed recommendations for the fee proposal to contracted providers of adult social care services for the period 2024/25.
2. For each provider sector, the Council has uplifted the staffing element of the fee by 10% in line with the increase in the Real Living Wage and National Living Wage

Recommendation(s)

3. Residential Care 2024/25 Fee Proposal

The Council proposes to increase the weekly fees paid per person to providers for the provision of Older Adults Residential Care as shown below:

Older Adults Residential Care

Rate type	Weekly Fee Rate 2023/24	% Uplift	Weekly Fee Rate 2024/25
Real Living Wage	£632.70	7.48%	£680.02
Standard	£616.96	7.48%	£663.11

Older Adults Residential Dementia

Rate type	Weekly Fee Rate 2023/24	% Uplift	Weekly Fee Rate 2024/25
Real Living Wage	£662.85	7.53%	£712.73
Standard	£646.22	7.53%	£694.85

Older Adults General Nursing

Rate type	Weekly Fee Rate 2023/24	% Uplift	Weekly Fee Rate 2024/25
Real Living Wage	£703.00	7.52%	£755.86
Standard	£686.36	7.52%	£737.97

Older Adults Nursing Dementia

Rate type	Weekly Fee Rate 2023/24	% Uplift	Weekly Fee Rate 2024/25
Real Living Wage	£754.61	7.69%	£812.65
Standard	£737.98	7.69%	£794.74

Adults Residential Care MH/LD/PD

Rate type	Weekly Fee Rate 2023/24	% Uplift	Weekly Fee Rate 2024/25
Real Living Wage	£632.70	7.48%	£680.02
Standard	£616.96	7.48%	£663.11

3 Care at Home 2024/25 Fee Proposal

- 3.1 In 22/23, with the introduction of the Controcc system, the Council were able to introduce payment on actual contact time. This is in line with the care at home contract and resulted in an in-year uplift being made available to those providers meeting specific Key Performance Indicators. This continues in the 24/25 fee proposal. The Council proposes to increase the hourly fees paid per person to providers for the provision of Care at Home as shown below:

Care at Home (Framework)

Rate type	Hourly Fee Rate 2023/24	% Uplift	Hourly Fee Rate 2024/25
Standard	£20.49	8.24%	£22.17
KPI compliant	£24.18	8.24%	£26.17

4 Supported Living and Community Outreach 2024/25 Fee Proposal

- 4.1 The Council proposes that where we pay an hourly rate for Supported Living and Community Outreach services, it will be no more than the uplifted rate outlined below. Please note this rate will not be applicable where services have been commissioned on block arrangement/via a competitive tender:

Supported Living Waking Hours

Rate type	Hourly Fee Rate 2023/24	% Uplift	Hourly Fee Rate 2024/25
Real Living Wage	£19.88	7.35%	£21.34
Standard	£19.56	7.22%	£20.97

Supported Living Sleep-in rate

Rate type	Hourly Fee Rate 2023/24	% Uplift	Hourly Fee Rate 2024/25
Real Living Wage	£11.96	9.71%	£13.11
Standard	£11.66	9.56%	£12.77

5. Direct Payments 2024/25 Fees Proposal

- 5.1 The Council proposes to increase the hourly rate paid per person to a personal assistant for those in receipt of Direct Payments as shown below. The Direct Payment rate already allowed the payment of the Real Living Wage and so there is only one rate proposed:

Direct Payments (Personal Assistants)

Rate type	Hourly Fee Rate 2023/24	% Uplift	Hourly Fee Rate 2024/25
Real Living Wage	£12.78	9.33%	£13.97

6. Shared Lives

- 6.1 Shared Lives provision is an area of development and focus for the Council over the coming 12 months and has resulted in a redesign of the funding bands. Many Shared Lives rates have not been uplifted in over 5 years so in recognition of this, the current proposal is to provide a one off, in year (2023/24) uplift to current carers at total cost of £28,029, followed by the below uplift for 2024/25:

Rate type	Session Fee Rate 2023/24	% Uplift	Hourly Fee Rate 2024/25
Day Support	£21.59	7.94%	£23.31
Current respite carers	£56.42	7.94%	£60.90
Respite -Band 1 new carers	£46.99	7.94%	£50.72
Respite -Band 2 new carers	£62.51	7.94%	£70.16
Respite -Band 3 new carers	£70.41	7.94%	£86.35
Current long term carers	£394.96	7.94%	£426.33
Long Term (Band 1 new customers)	£349.79	7.94%	£377.58
Long Term (Band 2 new customers)	£401.02	7.94%	£431.77
Long Term (Band 3 new customers)	£434.31	7.94%	£485.75

customers)			
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Reasons for recommendation(s)

7. The Council is required to carry out a provider fee engagement process and has done so for year 24/25. The uplifts are within budget and look to drive the provider market to meet needs now and going forward, while ensuring provider sustainability in light of current pressures. The recommended fee rates also support providers to pay their staff the Real Living Wage and continue the move towards the Fair Cost of Care.

Alternative options considered and rejected

8. Alternatives were not considered as we are required to issue fee uplifts within allocated budget.

Report Author and Contact Details:

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Position: Strategic Lead Integrated Commissioning
Department: One Commissioning Organisation
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Background

1. Introduction

- 1.1 The Council is undertaking a fee engagement process with contracted providers of adult social care services in order to define both the fee proposals for 2024/25 and determine the final fee recommendations.
- 1.2 The Community Commissioning Team usually reviews fee rates on an annual basis. It is recommended that the fee arrangements proposed this year are also for one year only 1st April 2024 – 31st March 2025. This report provides recommendations for the payment of fees in relation to the following service areas:
 - Older Adults Residential Care
 - Adults Mental Health (MH)/Learning Disabilities (LD)/Physical Disabilities (PD) Residential Care
 - Care at Home
 - Supported Living
 - Direct Payment
 - Shared Lives

Not covered by this report:

- Out of Borough Services where we pay the host authority agreed annual rate.

2. Real Living Wage

- 2.1 The Council is a proud Real Living Wage paying Local Authority and supports its Adult Social Care Providers to also pay their staff the Real Living Wage by offering higher rates to those who commit to it. The increase in the Real Living Wage and

National Living Wage of 10% is considerable but the Council is happy to maintain its commitment to its providers by ensuring this increase is covered in the staffing element of the providers fees.

- 2.2 For clarity; providers had to sign a contract variation to commit to paying the Real Living Wage by April 2023. Those that have will be paid the higher rate, those that have not signed up will get the lower rate.

3. Fee Proposal

- 3.1 In response to the above, and feedback from providers the following option is proposed:
- 3.2 Continue with the development of a tiered fee model specifically within Care Homes in order to support the strategic direction of Bury and future market development. Four years ago, a dementia premium was introduced in Bury for the first time and three years a nursing dementia premium. This year those premiums will be increased further.
- 3.3 Allow the premium, currently eligible for Residential Dementia and Nursing Dementia providers, to paid for those customers with other complex needs that require a higher level of intensive support. This will encourage providers to accept more complex referrals often with higher acuity. Criteria for this will be developed alongside Operational colleagues and providers.
- 3.4 This will continue to form the basis of care home fee setting in the future with areas of development such as Dementia, complex needs and nursing care receiving higher level increases. It is a common complaint that there is little reason for Providers to expand into those areas where we are seeing and continue to expect increased demand when there is little differentiation between the fee levels.

4. Residential Care 2024/25 Fee Proposal

- 4.1. The Council proposes to increase the weekly fees paid per person to providers for the provision of Older Adults Residential Care as shown below:

Older Adults Residential Care

Rate type	Weekly Fee Rate 2023/24	% Uplift	Weekly Fee Rate 2024/25
Real Living Wage	£632.70	7.48%	£680.02
Standard	£616.96	7.48%	£663.11

Older Adults Residential Dementia

Rate type	Weekly Fee Rate 2023/24	% Uplift	Weekly Fee Rate 2024/25
Real Living Wage	£662.85	7.53%	£712.73
Standard	£646.22	7.53%	£694.85

Older Adults General Nursing

Rate type	Weekly Fee Rate 2023/24	% Uplift	Weekly Fee Rate 2024/25
Real Living Wage	£703.00	7.52%	£755.86
Standard	£686.36	7.52%	£737.97

Older Adults Nursing Dementia

Rate type	Weekly Fee Rate 2023/24	% Uplift	Weekly Fee Rate 2024/25
Real Living Wage	£754.61	7.69%	£812.65
Standard	£737.98	7.69%	£794.74

Adults Residential Care MH/LD/PD

Rate type	Weekly Fee Rate 2023/24	% Uplift	Weekly Fee Rate 2024/25
Real Living Wage	£632.70	7.48%	£680.02
Standard	£616.96	7.48%	£663.11

5 Care at Home 2024/25 Fee Proposal

- 5.1 In 22/23, with the introduction of the Controcc system, the Council were able to introduce payment on actual contact time. This is in line with the care at home contract and resulted in an in-year uplift being made available to those providers meeting specific Key Performance Indicators. This continues in the 24/25 fee proposal. The Council proposes to increase the hourly fees paid per person to providers for the provision of Care at Home as shown below:

Care at Home (Framework)

Rate type	Hourly Fee Rate 2023/24	% Uplift	Hourly Fee Rate 2024/25
Standard	£20.49	8.24%	£22.17
KPI compliant	£24.18	8.24%	£26.17

6 Supported Living and Community Outreach 2024/25 Fee Proposal

- 6.1 The Council proposes that where we pay an hourly rate for Supported Living and Community Outreach services, it will be no more than the uplifted rate outlined below. Please note this rate will not be applicable where services have been commissioned on block arrangement/via a competitive tender:

Supported Living Waking Hours

Rate type	Hourly Fee Rate 2023/24	% Uplift	Hourly Fee Rate 2024/25
Real Living Wage	£19.88	7.35%	£21.34
Standard	£19.56	7.22%	£20.97

Supported Living Sleep-in rate

Rate type	Hourly Fee Rate 2023/24	% Uplift	Hourly Fee Rate 2024/25
Real Living Wage	£11.96	9.71%	£13.11
Standard	£11.66	9.56%	£12.77

7 Direct Payments 2024/25 Fees Proposal

- 7.1 The Council proposes to increase the hourly rate paid per person to a personal assistant for those in receipt of Direct Payments as shown below. The Direct Payment rate already allowed the payment of the Real Living Wage and so there is only one rate proposed:

Direct Payments (Personal Assistants)

Rate type	Hourly Fee Rate 2023/24	% Uplift	Hourly Fee Rate 2024/25
Real Living Wage	£12.78	9.33%	£13.97

8 Shared Lives

- 8.1 Shared Lives provision is an area of development and focus for the Council over the coming 12 months and has resulted in a redesign of the funding bands. Many Shared Lives rates have not been uplifted in over 5 years so in recognition of this, the current proposal is to provide a one off, in year (2023/24) uplift to current carers at total cost of £28,029, followed by the below uplift for 2024/25:

Rate type	Session Fee Rate 2023/24	% Uplift	Hourly Fee Rate 2024/25
Day Support	£21.59	7.94%	£23.31
Current respite carers	£56.42	7.94%	£60.90
Respite -Band 1 new carers	£46.99	7.94%	£50.72
Respite -Band 2 new carers	£62.51	7.94%	£70.16

Respite -Band 3 new carers	£70.41	7.94%	£86.35
Current long term carers	£394.96	7.94%	£426.33
Long Term (Band 1 new customers)	£349.79	7.94%	£377.58
Long Term (Band 2 new customers)	£401.02	7.94%	£431.77
Long Term (Band 3 new customers)	4£34.31	7.94%	£485.75

9 Fair Cost of Care

- 9.1 In 2022/2023 the Community Commissioning Team completed a Fair Cost of Care Exercise in response to requirements from the Department of Health and Social Cre.
- 9.2 The Market Sustainability and Fair Cost of Care Fund was designed to address the impact of the government's aim to allow more people who fund their own care to pay the lower rate that Councils can access from 2023, as well as under investment in care.
- 9.3 The Government expected "local authorities will carry out activities such as":
- Conducting a cost of care exercise to determine sustainable rates and how close they are to paying those rates.
 - Engage with local providers to improve data on costs and number of self-funders, to assist them in understanding the impact of reform on the market (in particular 65+ residential care, but also domiciliary care).
 - Strengthen capacity to plan for and execute greater market oversight and improved market management, ensuring markets are positioned to deliver on reform ambitions.
 - Use funding to increase fees, as appropriate to local circumstances. This funding should not be used to fund core pressures (for which authorities are reminded they can use the social care grant, improved Better Care Fund, and Social Care Precept).
- 9.4 In 2023/24, the Fair Cost of Care, alongside other charging reforms was delayed and specific funding was rolled into Adult Social Care Market and Sustainability Improvement Fund rather than be offered as a separate funding stream. The requirement to achieve the fair cost of care was also moved to "work towards" the fair cost of care.
- 9.5 The continued move towards a fair cost of care will result in a need to significantly uplift fees. The amount allocated to Bury, and now included in Adult Social Care Market and Sustainability Improvement Fund, does not consider the level of our current fee rates. Where the Council is substantially below the fair cost of care under

analysis and the funding from the government does not meet the impact, the Council will have to cover any shortfall.

- 9.6 The fees offered in 24/25 continue the Council's commitment to substantial fee increases; supporting our move to a fair cost of care and ensuring the Council kept to its duties under the Care Act in ensuring a sustainable market.

10 Fee Engagement Process 2024-25

- 10.1 The Council undertakes an annual fee engagement process with contracted providers, in line with good practice and statutory legislation, which states that when setting and reviewing fee costs, Councils should have due regard to the actual costs of providing care and other local factors, along with a responsibility for managing the local care market.
- 10.2 Following feedback from Providers on previous years engagement, it was agreed that formal meetings would not be set up until after the budget available for provider fees had been set. There was a feeling that positive discussions would take place and then the budget available was set and if it was lower than anticipated it only caused disappointment and disillusionment from providers.
- 10.3 Fee Engagement Groups were run as part of the regular Strategic Engagement Groups for each service area, while feedback on current pressures was also sought from providers.

11 Cost Pressures

- 11.1 It is acknowledged that all providers of social care are facing the following national cost pressures over the next 12 months:
- National Living Wage (10% increase)
 - Inflation
 - CQC Registration
 - Energy Prices
 - Known and un-known COVID pressures including insurance increases/PPE costs etc
- 11.2 As shown above one of the cost pressures facing providers is the 10% increase in the National Living Wage (NLW) from £10.42 per hour in 2023/24 for workers over to £11.44 per hour from April 2024. This increase has been captured for all care providers in the staffing element of their fee uplift.
- 11.3 It is evident that many providers of social care pay the majority of employees, at or near to the minimum wage and as employee costs equate to a large proportion of expenditure for social care providers, the mandatory requirement to increase pay to those employees that are paid the minimum wage will result in a cost pressure.
- 11.4 There will also be an expectation from those employees that are paid close to the minimum wage that the differential will continue to be maintained or there will be a real risk that the profession will become less attractive to existing or potential employees and providers will struggle to recruit either sufficient numbers or caliber of people.
- 11.5 The UK's main inflation measure as of January 2024, was 3.9%. This, alongside the

rising energy prices is putting more pressure on the ongoing viability of all Adult Social Care Providers.

12 Benchmarking AGMA Council Fee Rates

- 12.1 Another issue to consider when setting fee rates is that of fee rates paid in neighbouring authorities, to ensure that the Council pays comparable rates to others, which creates an element of stability to the wider market across Greater Manchester (GM). We have not received our partners 2024/25 rates at this time for comparison but from discussions we are in line with neighbouring authorities.

13 Consultation – Provider Feedback

- 13.1 Provider responses to the cost and operational pressure forms have been collated. Pressures were broadly similar across providers with the main themes being:

- Energy costs
- Inflation
- Retention and recruitment concerns
- Potential increasing PPE/cleaning costs
- Increased in Insurance costs
- NLW and RLW uplifts
- Increased CQC costs
- Reduced occupancy and capacity with care homes and care at home providers.

Links with the Corporate Priorities:

14. The uplifts will support providers of Adult Social Care; working and based locally to remain sustainable. It also encourages enterprise within the provider market by encouraging development of services to meet the growing needs of the people of Bury.

Equality Impact and Considerations:

15. EIA is available upon request.

Environmental Impact and Considerations:

16. An environmental impact assessment has not been undertaken for the scheme, as there are no implications or carbon impact of this decision.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Uplifts are insufficient to maintain the sustainability and viability of care providers.	Fee proposals were established as part of engagement exercise with providers.

	Council Commissioning team allocate each care provider their own contract manager who will continue to work with, support and monitor risk to individual provider sustainability.
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Legal Implications:

Section 5 of the Care Act 2014 places a duty on local authorities to promote the efficient and effective operation of a market in services for meeting care and support needs, with a view to ensuring services are diverse, sustainable, and high quality for the local population, including those who pay for their own care. Section 4.31 of the Care and Support Statutory Guidance states, *“When commissioning services, local authorities should assure themselves and have evidence that contract terms, conditions and fee levels for care and support services are appropriate to provide the delivery of the agreed care packages with agreed quality of care. This should support and promote the wellbeing of people who receive care and support and allow for the service provider’s ability to meet statutory obligations to pay at least the minimum wage and provide effective training and development of staff”*.

“It should also allow retention of staff commensurate with delivering services to the agreed quality and encourage innovation and improvement. Local authorities should have regard to guidance on minimum fee levels necessary to provide this assurance, taking account of the local economic environment. This assurance should understand that reasonable fee levels allow for a reasonable rate of return by independent providers that is sufficient to allow the overall pool of efficient providers to remain sustainable in the long term”.

The Council is required to have due regard in ensuring the sustainability of the market, in addition to facilitating the development of their Local Adult care market so that it meets the care and support needs of people in their area. A sustainable market allows for the sufficient supply of services, investment, innovation, and choice for people to choose care and a sufficient workforce supply.

The Care Act 2014 also places a duty on local authorities to assure themselves that fee levels are appropriate to provide the agreed quality of care and enable providers to effectively support people who have care needs as well as the ability to invest in staff development, innovation and improvement. The Council is required to carry out a provider fee engagement process and has done so for year 24/25.

Financial Implications:

The increase in the Real Living Wage is provided for within the 2024/25 budget.

Appendices:

None.

Background papers:

None.

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

Term	Meaning

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Classification: Open	Decision Type: Non-Key
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Report to:	Cabinet	Date: 13 March 2024
Subject:	Annual Review of Adult Social Care Fees and Charges for the Financial Year 2024/25	
Report of	Cabinet Member for Health and Wellbeing	

Summary

1. The Health and Adult Care (HAC) Directorate raises several Adult Social Care (ASC) fees and charges.
2. This report details the proposed 2024/25 ASC fees and charges across the HAC directorate to take effect in April 2024

Recommendation(s)

3. It is recommended that the proposed Adult Social Care Fees & Charges for 2024/25 detailed in Appendix A of this report are approved.

Reasons for recommendation(s)

4. In accordance with the Council's Financial Regulations, there is a requirement to review fees and charges on an annual basis.

Alternative options considered and rejected

5. No alternatives were considered. The uplift to 2024/25 Adult Social Care fees is in line with the 2024/25 Adult Social Care Provider Fee Uplifts or in line with the November 2023 Autumn Statement which announced that benefits will increase by 6.7%.

Report Author and Contact Details:

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Position: Business Partner

Department: Corporate Core - Finance

E-mail: p.oakley@bury.gov.uk

Background

6. The Health and Adult Care Directorate raises several Adult Social Care fees and charges and in accordance with the Council's Financial Regulations, there is a requirement to review fees and charges on an annual basis.

2024/25 Fee Proposal

7. The 2024/25 proposed increases to Adult Care Service discretionary fees and charges are detailed in Appendix A.

8. To ensure that the 2024/25 ASC fees and charges are aligned with the 2024/25 fees paid to commissioned providers it is proposed that the service setting fees (excluding Domiciliary Care) are uplifted by the same percentage rates employed to uplift the 2024/25 fees paid to commissioned providers.
9. Domiciliary care providers are paid at two different rates:
 - A standard rate for those providers being paid on actual contact time or not under the framework care at home contract.
 - An enhanced rate for those providers paid on actual contact time who also meet the following key performance indicators¹.
10. Whilst the Council has chosen to increase fees paid to Domiciliary Care providers which recognise Real Living Wage and minute billing commitments from Providers the Council cannot uplift Domiciliary care fees paid by residents at a similar rate.
11. Care Act Statutory Guidance states that Domiciliary care charges are made at one rate irrespective of how or by whom the care is delivered therefore only one rate can be charged for Domiciliary Care. The intention is to align Domiciliary fees with the enhanced rate paid to Providers, but this can only be achieved through a phased approach over several years.
12. The 2024/25 fees and charges proposal also recommends that the charges listed in Table 1 below are increased by 6.7% which is in line with the November 2023 Autumn Statement which announced that benefits will increase by 6.7%.
13. This year Carelink will be introducing 2 levels of charge to reflect add on devices that are available. Additional fees will also be charged to cover the SIM card costs for new digital units and an installation fee for all new customers of £25 will be introduced. The new charges are highlighted in appendix A.

Table 1

Charge Description	Description
Weekly Charge for Homecare	The maximum charge a person who receives care and support at home will be charged per week
Transport to Day Centres	The standard rate of charge for a single or return trip to a day centre.
Carelink/Telecare	Weekly charge for the provision of the 24/7 Carelink Assistive Technology Service.

¹ Zero overlaps (i.e. Carer must log in/log out for each visit)
 Less than 5% manual overrides on Electronic Call Monitoring System (ECMS)
 Contractually compliant ECMS

Charge Description	Description
Home Support Service	Weekly charge for the Support at Home Service in the wider community.
Day Centre Attendance	Daily charge for attending a day centre
Appointeeship – Community based	Weekly charge for a Money Management Service of Appointeeship for those living at home.
Appointeeship – Residential based	Weekly charge for a Money Management Service of Appointeeship for those living in a Care Home.
Deferred Payments – Set-up fee	Fee for setting up the Legal Agreements and process for the Deferred Payments Scheme where people entering a Care Home require access to council funding until their property is sold.
Deferred Payments - Annual fee	An annual fee for those on the Deferred Payment Scheme receiving Council funding until their property is sold.
Deferred Payments – Termination fee	A final fee to close accounts and legal agreements for those on the Deferred Payment Scheme who have repaid the Council the funding provided whilst their property was being sold.

Financial Assessments

14. Any changes to an individual's financial circumstances will be considered as part of the normal review process, and a new financial assessment carried out where appropriate to ensure the charges levied remain fair and affordable in line with the Council's Client Charging policy.
15. Whilst the rates set out in Appendix A will be used to calculate the cost of care, a separate financial assessment is carried out for each service user and the service user will only contribute the value deemed affordable to them in that assessment. As the Minimum Income Guarantee financial assessment allowances prescribed by Government will also increase for 2024/25, most service users' charges will see a minimal increase following a financial reassessment for 2024/25, and therefore any increased income from service user contributions would be negligible.

Links with the Corporate Priorities:

16. Enterprise – For those service users whose financial assessment result in a partial or full contribution the annual review of Adult Social Care fees and charges for the Financial Year 2024/25 ensures that the council can partially/fully offset the cost of delivering care and therefore reducing the cost to the Council.

Equality Impact and Considerations:

17. The full EIA (Equality Impact Analysis) document is available upon request. The EIA for the charging and financial assessment policy considers a positive impact as allowances & disregards are available if required and applied equally and fairly to all people using care and support services.

Environmental Impact and Considerations:

18. An environmental impact assessment has not been undertaken as there are no implications or carbon impact of this decision.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The fees and charges set lower than the cost of that the Council pays for services that are 'chargeable,' resulting in a cost pressure to the council.	-Fees are aligned to Commissioned Care Provider Fee Uplifts. -Non-Commissioned Care provider charges uplifted in line with the November 2023 Autumn Statement which announced that benefits will increase by 6.7%.

Legal Implications:

The power of a Local Authority to make a charge for meeting needs is contained within the Care Act 2014, this act provides a single legal framework for charging for care and support under sections 14 and 17. Charges may only cover the cost that the local authority incurs in meeting the needs to which the charge applies. the Council has a duty to market shape, so it has duty to facilitate the whole market in its areas for care and support related services and ensure a diverse range of high quality services to the population. The Council must understand supply and demand in terms of care and support related care and market shape accordingly. Failure to increase fees in line with 2024/25 Adult Social Care Provider Fee Uplifts is potentially a failure of the Council to comply with the Statutory Guidance. The charging of service users is appropriate and in line with statute.

Financial Implications:

The 2024/25 budget assumes an uplift to fees and charges.

Background papers:

None.

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

Term	Meaning
HAC	Health and Adult Care Directorate
ASC	Adult Social Care

Appendix A

Service Setting/Charge Description			Unit	2023/24 Rate	2023/24 Uplift	2024/25 Rate	Notes
Domicillary Care			Hourly	£ 20.49	8.2%	£ 22.17	1
Residential	65+ care home places without nursing	Real Living Wage	Weekly	£ 632.70	7.5%	£ 680.02	2
		Standard Rate	Weekly	£ 616.96	7.5%	£ 663.11	3
	65+ care home places without nursing - Dementia	Real Living Wage	Weekly	£ 662.85	7.5%	£ 712.73	2
		Standard Rate	Weekly	£ 646.22	7.5%	£ 694.85	3
	Adults Residential Care MH/LD/PD	Real Living Wage	Weekly	£ 632.70	7.5%	£ 680.02	2
		Standard Rate	Weekly	£ 616.96	7.5%	£ 663.11	3
Nursing	65+ care home places with nursing	Real Living Wage	Weekly	£ 703.00	7.5%	£ 755.86	2
		Standard Rate	Weekly	£ 686.36	7.5%	£ 737.97	3
	65+ care home places with nursing - Dementia	Real Living Wage	Weekly	£ 754.61	7.7%	£ 812.65	2
		Standard Rate	Weekly	£ 737.98	7.7%	£ 794.74	3
Supported Living	Waking Hours	Real Living Wage	Hourly	£ 19.88	7.3%	£ 21.34	2
		Standard Rate	Hourly	£ 19.56	7.2%	£ 20.97	3
	Sleep Ins	Real Living Wage	Hourly	£ 11.96	9.7%	£ 13.12	2
		Standard Rate	Hourly	£ 11.66	9.6%	£ 12.77	3
Direct Payments			Hourly	£ 12.78	9.3%	£ 13.97	
Maximum Weekly Charge for Homecare			Weekly	£ 473.98	6.7%	£ 505.74	4
Transport to Day Centres			Single Journey	£ 3.01	6.7%	£ 3.21	4
			Return Journey	£ 5.55	6.7%	£ 5.92	4
Carelink/Telecare	Level 1 - Unit without Sim Card		Weekly	£ 4.86	6.7%	£ 5.18	4
	Level 1 - Unit with Sim Card		Weekly	New Charge fo 2024/25		£ 6.09	
	Level 2- Unit without Sim Card		Weekly	New Charge fo 2024/25		£ 7.46	
	Leve 2 - Unit with Sim Card		Weekly	New Charge fo 2024/25		£ 8.36	
	Installation Fee		One Off	New Charge fo 2024/25		£ 25.00	
Home Support Service			Weekly	£ 22.43	6.7%	£ 23.93	4
Day Centre Attendance			Daily	£ 45.32	6.7%	£ 48.35	4
Appointeeship – Community based			Weekly	£ 12.72	6.7%	£ 13.57	4
Appointeeship – Residential based			Weekly	£ 6.71	6.7%	£ 7.15	4
Deferred Payments – set-up fee			One Off	£ 289.01	6.7%	£ 308.38	4
Deferred Payments - annual fee			Annual	£ 173.41	6.7%	£ 185.03	4
Deferred Payments – Termination fee			One Off	£ 86.70	6.7%	£ 92.51	4

Notes:

1	Care Act Statutory Guidance states that Care at Home charges are made at a standard rate irrespective of how or by whom the care is delivered therefore only one rate can be charged for Domicillary Care
2	The Real Living Wage rate is paid to those Residential and Nursing Home providers who have committed to paying their staff the RLW
3	The Standard Rate is the rate paid to those providers who have not committed to paying their staff the RLW
4	In the Autumn Statement, the chancellor confirmed that benefits will increase by 6.7% which is in line with September's Consumer Prices Index (CPI) measure of inflation.



Classification: Open	Decision Type: Non-Key
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Report to:	Cabinet	Date: 13 March 2024
Subject:	Adult Social Care Performance Quarter Three Report 2023/24	
Report of	Cabinet Member for Health and Wellbeing	

Summary

1. This is the Adult Social Care Department Quarter 3 Report for 2023-24. The report outlines delivery of the Adult Social Care Strategic Plan, preparation for the new CQC Assessment regime for local authorities and provides an illustration and report on the department's performance framework.

Recommendation(s)

2. To note the report.

Reasons for recommendation(s)

3. N/A.

Alternative options considered and rejected.

4. N/A.

Report Author and Contact Details:

Name: Adrian Crook

Position: Director of Adult Social Services and Community Commissioning

Department: Health and Adult Care

E-mail: a.crook@bury.gov.uk

Background

5. This is the Adult Social Care Department Performance Report, covering Quarter 3 of 2023-24.
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Links with the Corporate Priorities:

The Adult Social Care is Department is committed to delivering the Bury 'LETS' (Local, Enterprising, Together, Strengths) strategy for our citizens and our workforce.

Our mission is to work in the heart of our communities providing high-quality, person-centred advice and information to prevent, reduce and delay the need for reliance on local council support by connecting people with universal services in their local communities.

For those eligible to access social care services, we provide assessment and support planning and where required provide services close to home delivered by local care providers.

We aim to have effective and innovative services and are enterprising in the commissioning and delivery of care and support services.

We work together with our partners but most importantly together with our residents where our intervention emphasises building on individual's strengths and promoting independence.

We ensure that local people have choice and control over the care and support they receive, and that they are encouraged to consider creative and innovative ways to meet their needs. We also undertake our statutory duties to safeguard the most vulnerable members of our communities and minimise the risks of abuse and exploitation.

Equality Impact and Considerations:

6. In delivering their Care Act functions, local authorities should take action to achieve equity of experience and outcomes for all individuals, groups and communities in their areas; they are required to have regard to the Public Sector Equality Duty (Equalities Act 2010) in the way they do carry out their work. The Directorate intends to drive forward its approach to EDI, ensuring that equality monitoring information is routinely gathered, and consider how a realistic set of S/M/L-term objectives may help to focus effort and capacity.

Environmental Impact and Considerations:

7. N/A

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
N/A.	N/A.

Legal Implications:

8. There are no legal implications however this report provides Members with details of performance reporting alongside an update on preparation for the CQC assessment.

Financial Implications:

9. There are no financial implications relating to this report.

Appendices:

Appendix - Data sources and what good looks like.

Background papers:

Adult Social Care Strategic Plan 2023-2026

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

Term	Meaning
CQC	Care Quality Commission

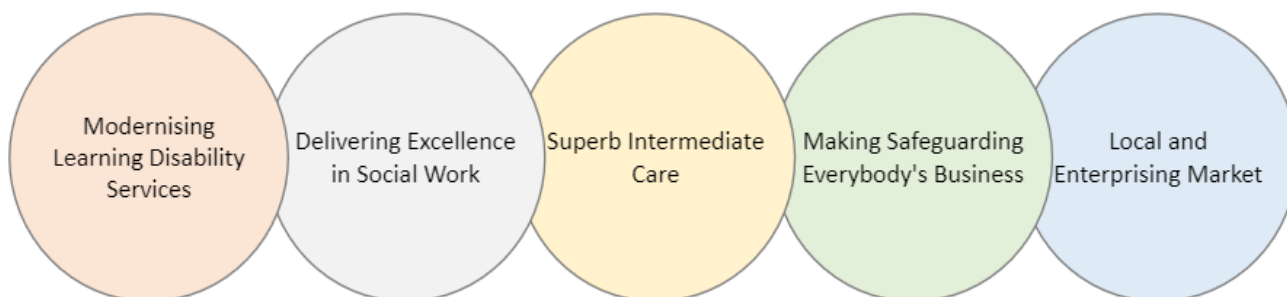
Adult Social Care Performance Report for Quarter Three, 2023/24

1.0 Executive Summary

- 1.1 This report provides a summary of the performance of the Adult Social Care Department during Quarter 3 of 2023-24. The report outlines delivery of the Adult Social Care Strategic Plan, preparation for the new CQC Assessment regime for local authorities and provides an update on the department's performance framework.
- 1.2 The department continues to experience high demand and of note especially this last quarter. December was a particularly busy month for our intermediate care services and is evidence of our support to the hospital system winter came, see 4.4
- 1.3 The number of times people contact us and the number of assessments we do in December appears to drop but this is simply a reflection of people preparing for Christmas and some of our services being closed on Christmas and Boxing Day.
- 1.4 As can be seen in 4.2 our waiting lists whilst beginning to fall can be erratic, this is due to the high volumes of work coming into the department which can result in small backlogs escalating quickly, it can be seen how an immediate response to this returned the levels quickly. We have recently used government grants to invest in extra staff to make further inroads into these waiting list, these include OTs and Social Workers and we expect to see more consistent improvement over the next 2 quarters. Our position compared to our neighbours since the last quarter has improved slightly.
- 1.5 We are finally seeing the increase in the number of outstanding reviews drop, this is thanks to the hard work of our reviewing team. Previously supporting the department with two care home closures and changes we needed to make to a home care agency because of poor quality services the team is now back wholly focused on carrying out reviews. Greater improvement is expected over the next 2 quarters.
- 1.6 Over special note in 4.6 is our improvement in recording outcomes for people undergoing a safeguarding investigation. Making safeguarding personal is one of our obsessions and performance has improved from 71% to 87% this quarter.
- 1.7 Continued work with our care homes now sees 82% of our care home beds rated Good or better, this is above the England average of 79%. 88.6% of our care home agencies continue to be rated Good or better but we have lost one agency since last quarter which ended its business due to poor quality services.

2.0 Delivery of the Adult Social Care Strategic Plan

- 2.1 Adult Social Care are committed to delivering the Bury 'LETS' (Local, Enterprising, Together, Strengths) strategy for our citizens and our workforce. Our mission is to work in the heart of our communities providing high-quality, person-centred advice and information to prevent, reduce and delay the need for reliance on local council support.
- 2.2 The Adult Social Care Strategic Plan 2023-26 sets out the Department's roles and responsibilities on behalf of Bury Council. It explains who we are, what we do, how we work as an equal partner in our integrated health and social care system and identifies our priorities for the next three years:



- 2.3 To build a health and social care system which will sustain our communities in the coming years within the funding available to us we need to look at providing support in different ways. Our journey over the next 3 years will be one of improvement and transformation, with the development of clear assurance mechanisms to enable transparency and accountability to the communities we serve. As we explore what social care delivery will look like 3 years from now, we will ensure that people who receive our support and their carers are at the heart of co-producing our social care delivery model and that their voice is central as we navigate through the financial and systemic changes we must make.
- 2.4 The 2023-26 Strategic Plan includes an annual delivery plan to deliver the service priorities, this is monitored on a quarterly basis. Quarter 3 highlights include (see overleaf):

2.4.1 Priority – Modernising Learning Disabilities

The GM Individual Placement Scheme has started with co-ordinators being sign-posted to Learning Disability services system-wide to support referrals into work placements. The Bury Supported Employment Service has helped 12 people into employment between April and December. We have brought 46 people back to live in the borough over the past 12 months; we now have 32 people with Learning Disabilities living outside the borough (second lowest in GM). The 'Towards Independence' project continues to make significant costs savings across the system; a follow-up worker has been recruited which will mean an increase in people supported. Work continues to embed new pathway for Preparing For Adulthood with key training and co-production session delivered 5th February 2024 with one additional social worker recruited and further vacancies in recruitment.

2.4.2 Priority – Delivering Excellence in Social Work

Analysis of the evaluation of the 'My Life, My Way' assessment is underway; with a task and finish group to be set up to refresh the format and update the practitioner guidance. Mapping of social work training activity has been carried out. Regular upload of revised policies to the 'policy portal'

is taking place with good usage of the new platform by social work practitioners. Work is underway on developing our approach to co-production and how we obtain feedback from people who use our services. A mapping meeting took place in December with Adults Commissioners and children's services an improvement action plan is in development.

2.4.3 Priority – Superb Intermediate Care

The Technology Enabled Care (TEC) initial offer is now live to support staff and clients. As of February 24, savings to the department from the TEC project are circa £83k. The Registered Managers for home and bed base are in post and work is underway to implement revised management arrangements and start the quality improvements required for both areas. The N-Compass contract to support carers has been extended while a new Carer's Strategy and action plan is prepared.

2.4.4 Priority – Making Safeguarding Everybody's Business

Our Safeguarding policy and procedure has been signed-off by legal to be hosted on the policy portal. PIPOT (Person in a Position of Trust) review has been put on hold while NWADASS review their PIPOT policy. We will continue to work under the current policy through our PIPOT lead while this is undertaken. DoLS triage work is ready to be presented to workforce; alongside this the MARM (Multi Agency Risk Management) Local Authority is complete and have started briefing the social care front line on the process going forward.

To support cross team working in safeguarding and ensure that we are focusing on the outcomes of citizens we are trialling safeguarding social workers sitting with CAD (Connect and Direct) during duty to see if this supports cross-learning and review once completed. We continue to develop links with CAD and our commissioning colleagues. A large Organisational Safeguarding enquiry has been closed with positive outcomes and feedback from the provider and the family/loved ones of the residents. Our recording of personalised outcomes has improved to 87%

2.4.5 Priority – A Local and Enterprising Care Market

External funding brought in 2023/24 for housing development now stands at £2.3 million; Topping Mill and St Mary's schemes approved by Cabinet in November 2023. Carers interface of the Bury Directory has been reviewed and revised following stakeholder feedback. Work to refresh the Market Position Statement for Older People and Ageing Well has started. A Care at Home review is underway, and an Extra Care Steering Group established to produce an Extra Care Strategy and develop a pipeline of plans/proposals for the development of increased provision/new builds. The Dementia Steering Group has been re-established and membership refreshed with work started to develop an overarching Dementia Strategy.

3.0 Update on CQC Assessment of Local Authorities

- 3.1 The CQC published its finalized assessment guidance for local authorities, and it has been confirmed that the first local authorities to be assessed are West Berkshire, Hounslow and Hertfordshire. We expect a first tranche of 20 councils to be assessed, with local authorities informed in groups of three as the CQC scales up its assessments of all 153 councils.
- 3.2 Briefings on CQC assessment of local authorities will be offered as part of the scheduled Member Development sessions.
- 3.3 CQC Assessment readiness activity underway in Bury includes:
- Compiling the CQC Information Return.
 - Preparing a Self-Assessment of Adult Social Care in Bury.
 - Drafting a 'Getting the Call' plan
 - Briefings and support for staff.

4.0 Highlight Report for Quarter 3, 2023

Obsessions	Performance Measures	Frequency	Polarity	Sparkline	Lastest Data	Direction of Travel	Rank (higher is better)	
							CIPFA (16) 22/23	NW (23) Q2 23/24
<i>Reduce the number of people living in permanent nursing and residential care</i>	Long-term support needs (65+) are met by admission to residential and nursing care homes (per 100,000 population)	A	L		584	✓	14	20
	Number of individuals (65+) in a Permanent Residential placements (per 10,000 population)	Q	L		172	✗		20
	Number of individuals (65+) in a Permanent Nursing placements (per 10,000 population)	Q	L		41	✓		4
<i>Increase the number of people living well at home</i>	Quality of life of people who use services (composite survey metric out of 20)	A	H		18.8	✗	8	
	The proportion of people who use services who have control over their daily life	A	H		79%	✗	6	
	Proportion of services users in receipt of long-term community based services	Q	H		72%	✓		14
<i>Increase the number of people who have their safeguarding outcomes met</i>	Proportion of people who have their safeguarding outcomes fully met	Q	H		57%	✓		18
	Proportion of people who use services who feel safe	A	H		66%	✗	10	
<i>Increase the number of people leaving intermediate care services independently</i>	The proportion of people who received short-term services during the year where no further request was made for ongoing support	Q	H		82%	✓	8	7
	The proportion of older people (65+) who were still at home 91 days after discharge from hospital	A	H		87%	✗	8	
<i>Increase the number of people with a learning disability and/or autism who have their own front door and in paid employment</i>	Proportion of adults with a learning disability in paid employment	Q	H		2.4%	✗		15
	[Measure to be developed for recording people with their own front door]							
<i>Increase the number of people accessing care and support information and advice that promotes people's wellbeing and independence.</i>	The proportion of people and carers who use services who have found it easy to find information about services and/or support	A	H		64%	✗	11	
	The proportion of people who use services, who reported that they had as much social contact as they would like	A	H		40%	✗	11	

Annual Measures: updated Q4 22/23
Quarterly Measures: updated Q3 23/24

The Department has adopted an outcome-based accountability framework to monitor performance and drive improvement. Several outcomes have been chosen that will change if the objectives of our strategic plan are met, we call these our obsessions.

Reduce the number of people living in permanent residential care.

Reducing those that live in permanent residential or nursing care as a share of the numbers we support in total and increasing those that are living well at home demonstrates that the objectives set within our delivering superb intermediate care which provides rehabilitation and recovery to our older adults is working as more are able to be supported at home.

Improving personalisation, diverting people from unnecessary and care and support and maximising use of a person's strengths through the adoption of our new strength-based assessments as part our delivering excellence in social work programme will also increase the numbers able to live well at home and reduce those living in care homes.

Overall, this indicator is 584 per 100,000 of population. The indicator is measured annually over the financial year and the trend line shows a steady drop for a number of years. Bury performs overall on average.

Measuring residential home and nursing home use individually is available more frequently. This shows a reducing pattern of residential use at 172 per 100,000, however there was a small increase in quarter 3 when most recent data was available, and a small decrease in nursing home use. Care Home use increased dramatically after the pandemic as use of care home beds to facilitate hospital discharge continued, this led to a number of people entering care homes prematurely. Following the ending of funding, a refocus on recovery and personalisation as part of

our planning and our partnership with the NCA in the Discharge Front Runner Programme we are beginning to see these numbers drop again.

Increase the number living well at home.

The quality of life of people who use services should change if their experience of our care services improves as part of our development of a Care Quality Strategy. If people's experience of social work also improves as part of our work to deliver excellence in social work, they are also likely to report a higher quality of life when using services. This is an annual measure and is collected via the national adult social care survey.

Safeguarding outcomes

Asking people what outcomes they want to achieve and whether they have them during a safeguarding intervention is a central component of making safeguarding personal.

The making safeguarding personal framework was developed to provide a means of promoting and measuring practice that supports an outcomes focus and person led approach to safeguarding adults. The framework aims to enable councils and SABs to better identify how practice is impacting on outcomes, indicate areas for improvement, enable benchmarking, and share best practice and learning.

This indicator shows some recent improvement, and we are now 57% which is an improvement on last quarter, for this reason this remains one of our priorities. Our own internal data now shows that we are asking 85% of people their outcomes and either meeting or partially meeting these outcomes in over 90% of cases. This is a positive improvement that will show through the regional data in the next Qtr and has been celebrated with the social care staff that have worked hard against this obsession.

Increase the number of people living intermediate care independently.

Intermediate Care is a range of services aimed at preventing, reducing and delaying the need for care, helping people recover after hospital or avoid being admitted.

Rarely do we find people keen to be dependent upon adult social care, so it is important we have services available that aim to prevent this. This is why continuing to improve these services are a key priority in our plan. This indicator is available quarterly and shows that 82% of the people who use our intermediate care services receiving no ongoing long-term care, which although very high was ranked 8 out of 16 at the end of 22/23. The numbers using intermediate care services are shown later in the report.

People with learning disabilities or autism with their own front door and numbers in paid employment

These 2 simple outcomes demonstrate if the borough is being successful in improving the inclusion of our resident adults living with learning disabilities. A key priority of our plan is to modernise our services and improve outcomes of those living with learning disabilities and the priorities chosen by our learning disability partnership board include good jobs and better homes.

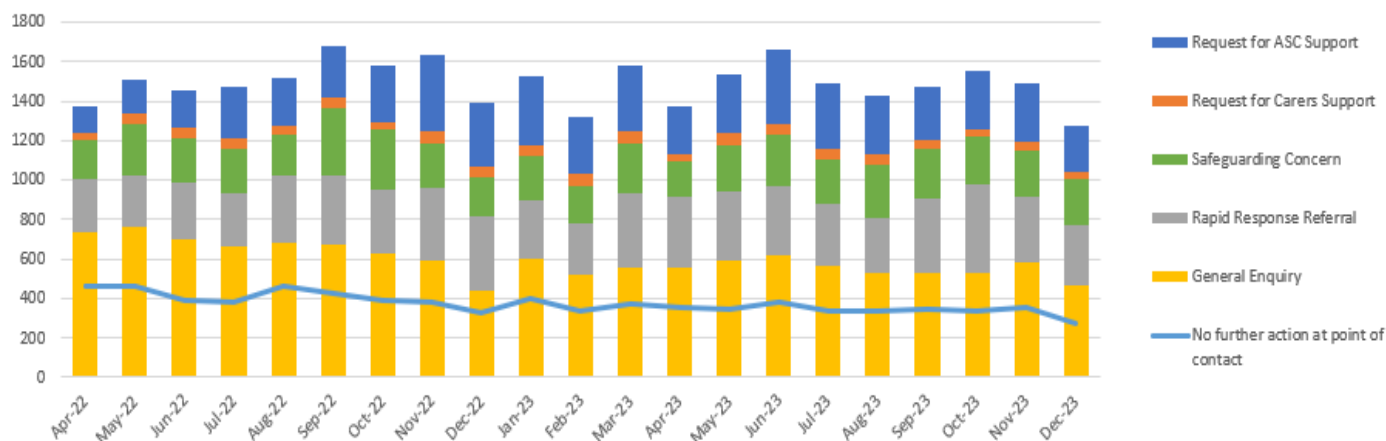
This data is available quarterly and we currently score 2.4% which means 2.4% of the adults living with learning disabilities who receiving adult social care support are in paid employment, we are ranked 15 out of 16 against our CIPFA peer group. We continue to have room for improvement in

this measure, but we hope to see improvements as our employment support service, BEST, continues to deliver even greater numbers of job outcomes.

4.1 Contacts

The primary means of public contact to request support, information and advice is through our care, connect and direct office (CAD). A higher proportion of contacts resolved by CAD means that people's enquiries are being dealt with straightaway and not passed on to other teams.

Number of Adult Social Care (ASC) Contact Forms recorded each month.



How does Bury Compare?

Contacts by Outcome | October 2023

	Safeguarding adults	Deprivation of liberty safeguards	Link to existing case	Progress to new case	Resolved at contact - equipment / adaptations / telecare to be provided	Resolved at contact - other	Unknown
Bolton	12.0%	7.3%	23.1%	31.7%	10.8%	15.0%	
Bury	6.3%	1.7%	0.7%	30.4%		56.6%	4.3%
Manchester	12.6%	8.2%	38.8%	16.8%	0.9%	22.7%	
Oldham	14.7%		1.9%	37.9%		45.0%	0.5%
Rochdale				43.7%	25.3%	31.0%	
Salford	0.1%	0.2%	74.1%	0.1%		25.5%	
Stockport	13.5%	6.4%	21.2%	25.9%	5.6%	27.4%	
Tameside	21.2%		16.0%	30.1%		32.7%	
Trafford	2.4%	10.5%	40.3%	13.1%		32.6%	1.1%
Wigan	15.5%	11.4%	35.4%	16.1%		21.6%	

Contacts – commentary

This shows the number of contacts the department receive each month and what they were about. It also illustrates the number resolved by our contact centre.

The pattern of contact shows little variation of over the seasons and a consistent pattern of increasing demand for intervention, this is shown by grey, green, orange and blue portions increasing whilst the general enquiries are dropping. The drop in December is due to the public holiday days in this month.

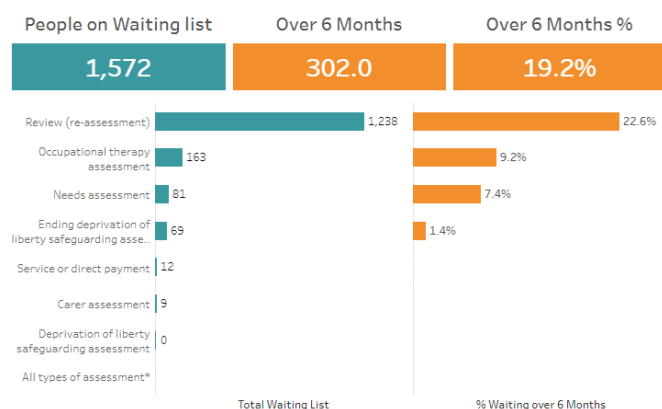
Current Bury is the top of Greater Manchester for resolving contacts in our contact centre.

4.2 Waiting Times for Assessments and Reviews

People awaiting an assessment or review of their needs by social workers, occupational therapists or deprivation of liberty safeguards assessors. Reduced waiting times lead to improved outcomes for people because they are receiving a timelier intervention.

Total number waiting for all interventions

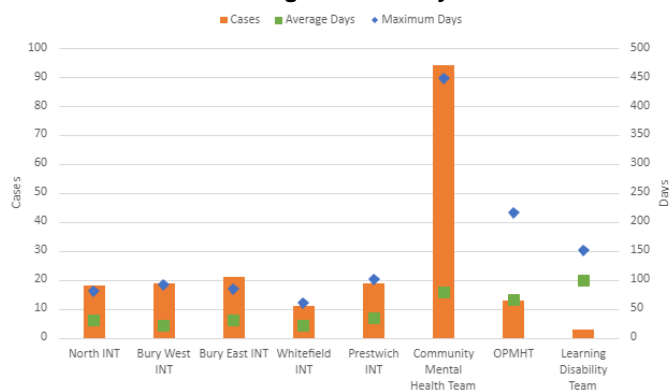
Waiting List Summary | as of December 2023



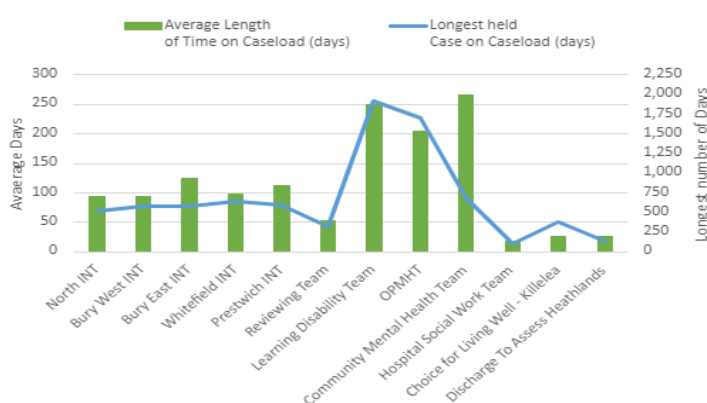
Needs & Carers Assessments: No. of Cases Waiting for Allocation.



Number of cases awaiting allocation by team



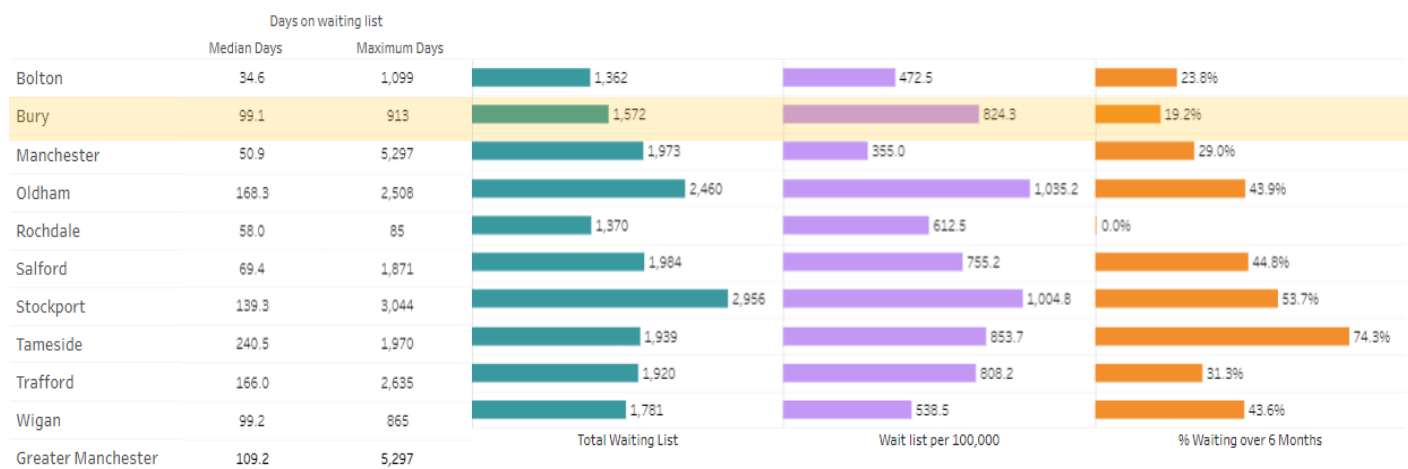
Average and Longest Time on Caseload



How does Bury Compare?

Waiting List By Local Authority | as of December 2023

[CLICK ON LOCAL AUTHORITY TO FILTER THE CHARTS ABOVE](#)



The Average Median Days for Greater Manchester is the Average of the LA medians rather than a true median value

Waiting list - commentary

This shows the number of people waiting for the different types of assessments provided by the department. Where people are waiting for a social worker to be allocated, we also show this by team.

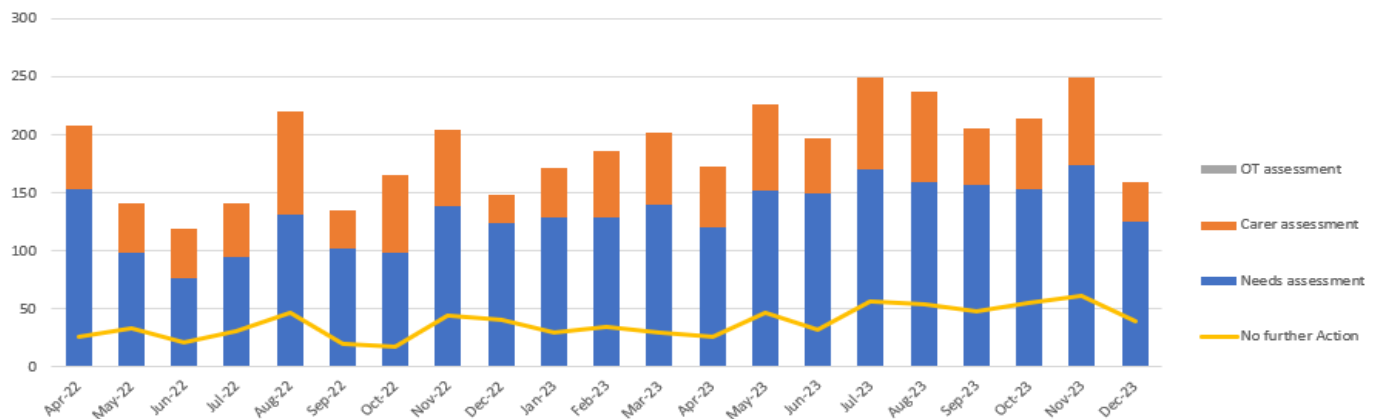
These charts illustrate the level of demand here in Bury and across Greater Manchester and the pressure the system is under whilst it recovers from back logs since COVID, struggles to keep pace with population growth with limited increases in resources and workforce challenges.

Following a proposal to utilise government grants to invest in staff to address our challenges in those waiting for reviews, those waiting for assessment under the Care Act and those waiting for assessment by an OT improvement in performance can be seen

4.3 Assessments

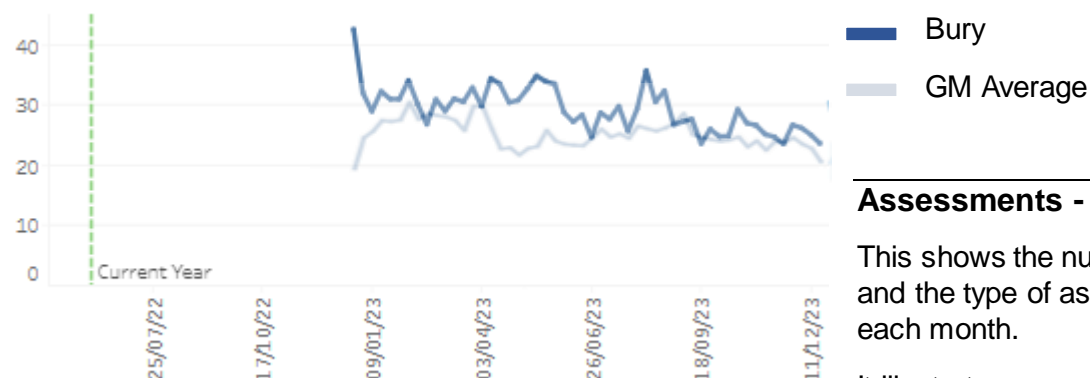
Local Authorities have a duty to carry out an assessment of anyone who appears to have needs for care and support, regardless of whether those needs are likely to be eligible. The focus of the assessment is on the person's needs, how they impact on their wellbeing, and the outcomes they want to achieve. Assessments where there was no further action are where there were no eligible needs identified or a person with eligible needs declined services. A lower number means that operation teams are able to focus their time on those people with identified needs.

Number of Adult Social Care (ASC) Assessments Completed each month.



How does Bury Compare?

Average number of Days between contact and Assessment



Updated: Dec 23

Assessments - commentary

This shows the number of assessments and the type of assessment we complete each month.

It illustrates a growing demand for needs assessments where we have seen an increase of nearly 50% growing from an average of 100 per month to 150 per month. This growth in demand is partly responsible for the increase in waiting lists.

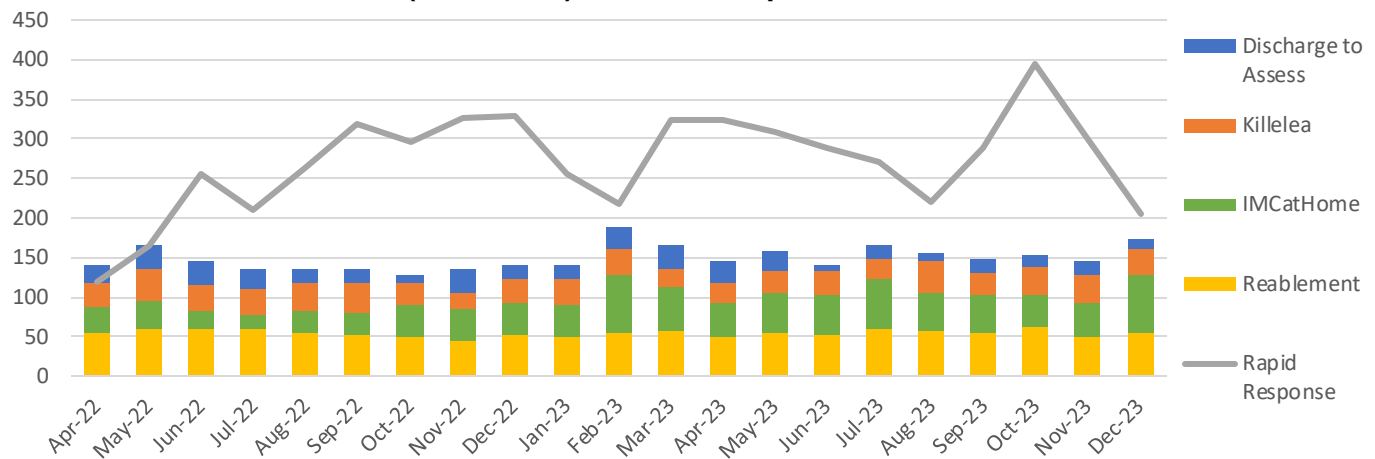
Despite this extra demand the time taken to complete an assessment is improving and now matches the GM average.

A drop in assessments in December is normal as people prioritise preparing for Christmas and parts of the department close for 2 days,

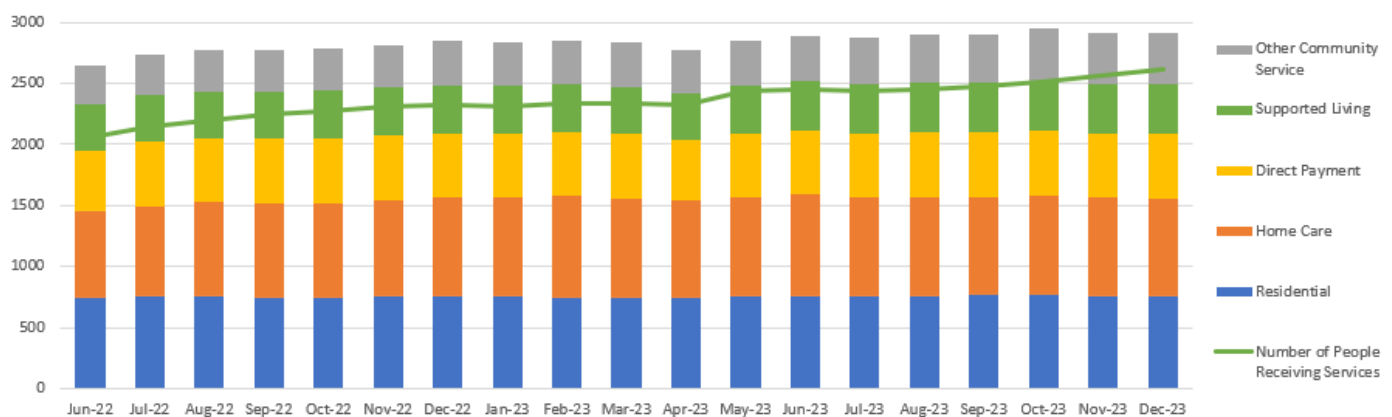
4.4 Services

Adult Social Care services may be short-term or long-term. Short-term care refers to support that is time-limited with the intention of regaining or maximising the independence of the individual so there is no need for ongoing support. Long-term care is provided for people with complex and ongoing needs either in the community or accommodation such as a nursing home. It is preferable to support people in their own homes for as long as it is safe to do so.

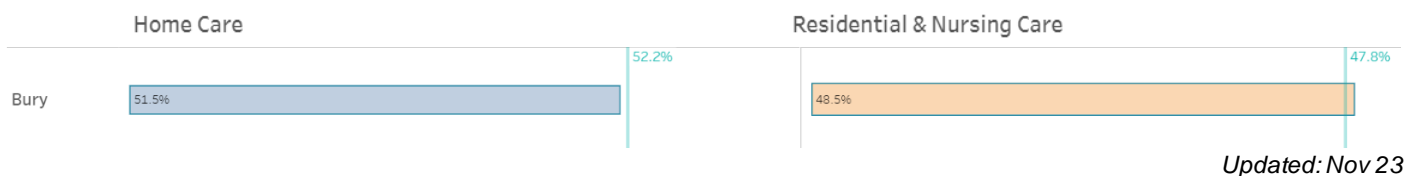
Number of Intermediate Care (short-term) services completed each month.



Number of Long-term Adult Social Care services open on the 1st of each month.

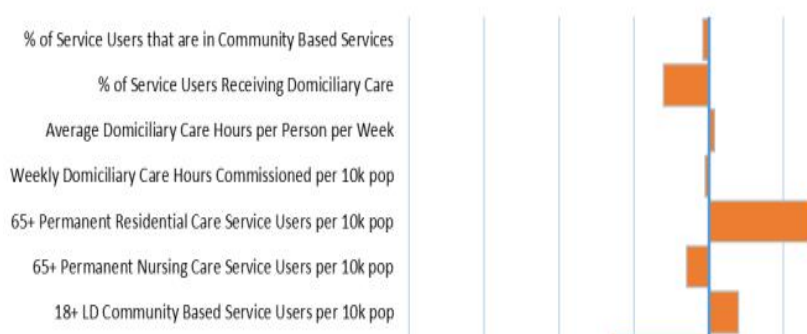


Proportion of Home Care vs Nursing and Residential Care Services compared against 2 years ago.

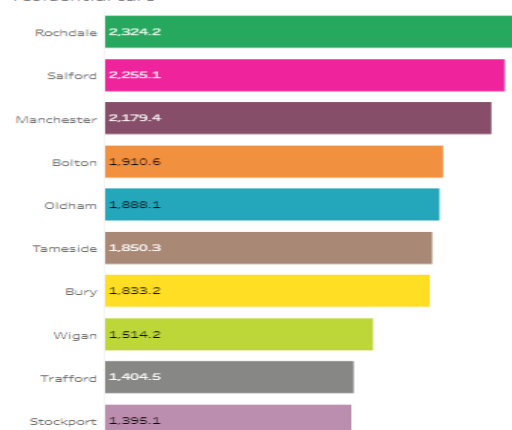


How does Bury Compare?

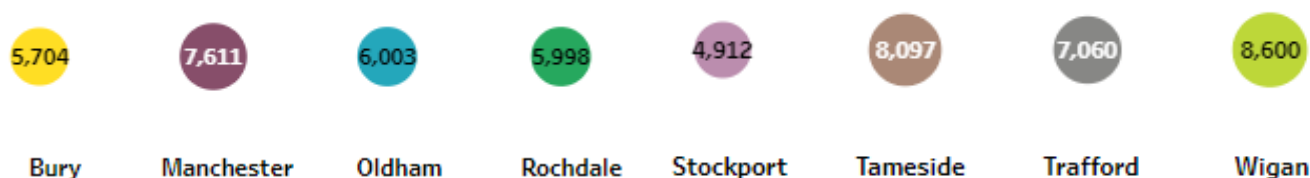
Analysing the Level of Provision Against the NW Average at Q2 2023/24



People receiving services per 100,000 population
November 2023 - Long term nursing care & Long term residential care



Service type by Local Authority per 100,000 population: November 2023



Services - commentary

This shows the number of people we support in our various service types.

The first chart shows the number of people supported in our intermediate care services. These services aim to prevent, reduce and delay the need for long term care and support so the busier they are the better.

The second chart shows the number we support with long term care services which has grown by nearly 400 or 18% in one year. However, this needs to be seen with the context of how many extra assessments have been completed which is considerably more. This shows our strength-based approach is helping keep people independent but despite this, additional services are still being provided albeit at a much lower rate of increase. There is currently a quality improvement program underway for reviewing all support plans requesting long-term packages of care and 24hr care, ensuring that minimal packages are used, enabling people to maintain as much independence as possible.

The third indicates the split between residential and home care and our position 2 years ago. Currently the number we support in residential care is slightly higher than 2 years ago. This is due to 2 reasons, 2 years ago we the pandemic and the numbers living in care homes was reducing, later in the pandemic and following hospital discharge policies to move people into care homes has increased this number. For this reason reducing our use of care homes continues to be one of our obsessions.

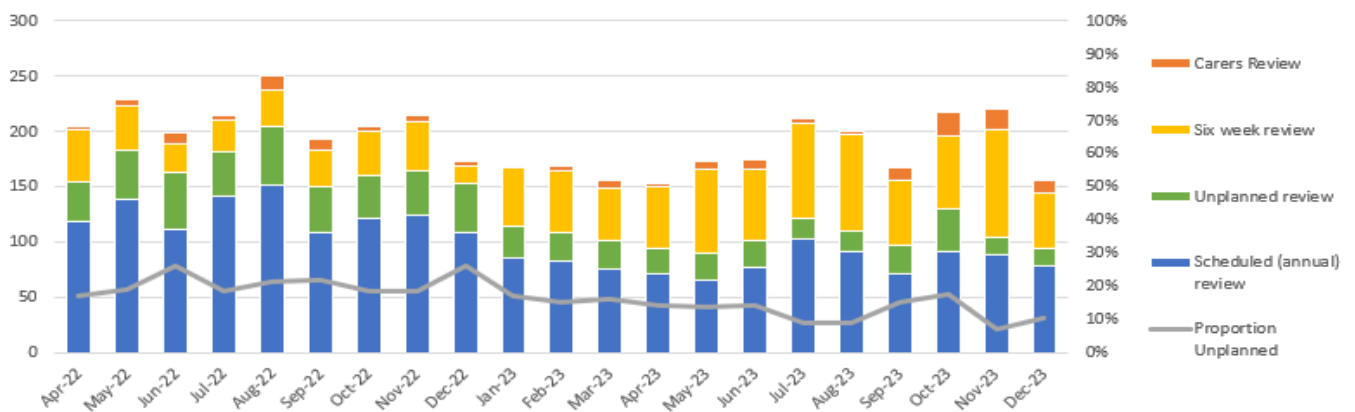
The final 3 charts are comparisons with the Northwest and Greater Manchester. It shows good performance in managing demand with us now being in the middle for supporting people in care homes compared to the rest of Greater Manchester but still higher than average when compared to whole of the Northwest.

December was a very productive month for our intermediate care services as activity was increased to support our hospitals

4.5 Reviews

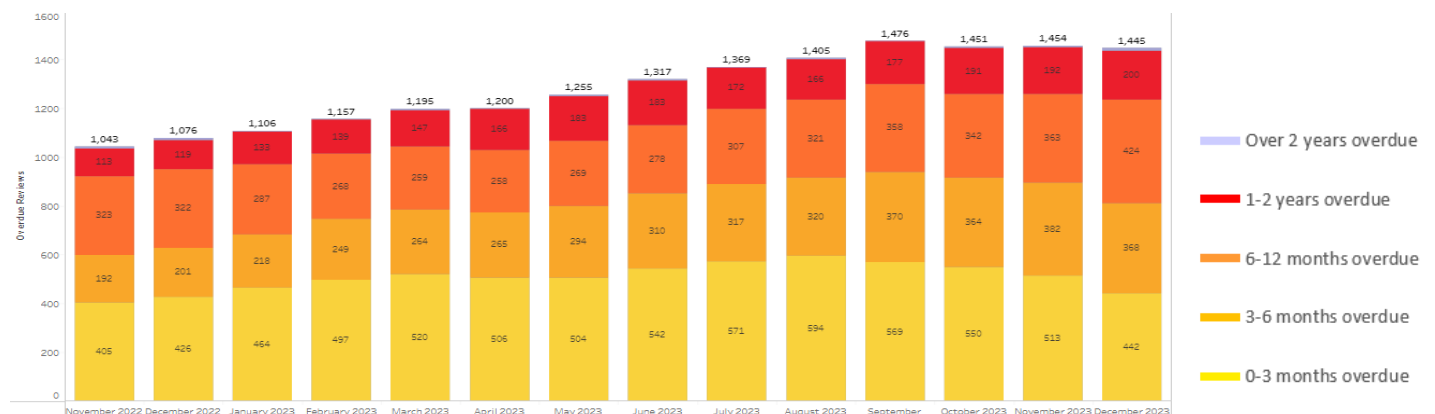
Adult Social Care reviews are a re-assessment of a person's support needs to make sure that they are getting the right support to meet their needs. Needs may change and new services and technology may give someone more independence and improve their wellbeing. A lower proportion of unplanned reviews means that people are supported through scheduled reviews of their support needs rather than when a significant event has occurred requiring a change in support. Support packages should be reviewed every 12 months.

Number of Adult Social Care Reviews Completed each month.



Note - the % axis references the grey line which is the proportion of unplanned reviews.

Number of Overdue Adult Social Care Reviews on the last day of each month



How does Bury Compare?

Metric	Bury	Northwest Average	Rank in Northwest (out of 22)
% of service users with a completed annual review	27.1%	85.5%	22 nd
% of service users with a review 2 years overdue	5.4%	12.6%	4 th

Last Updated: Q2 2023/24

Reviews - commentary

This shows the number of people who have had a review of their care and support and those who are overdue an annual review. All the 3000 people receiving long term services should receive an annual review each year and those new or in short term services should receive a review in the first 6 to 8 weeks.

A review is an opportunity to ensure someone's care and support is meeting their needs and personalised to them. It is also an opportunity to ensure care is not resulting in dependence and reduce care to increase independence. This also releases care back into the market to be used by others.

These 2 charts evidence the symptoms of a department experiencing high new demand. 6-to-8-week review numbers have increased as we review new people entering our system, but this is at the expense of the annual review where the numbers overdue increase.

Comparisons with the Northwest are included which shows us being 12 out of 22 for overall overdue reviews which demonstrate a whole system under pressure. We perform better on making sure people do not go 2 years overdue for a review with our performance being 4th highest in the Northwest.

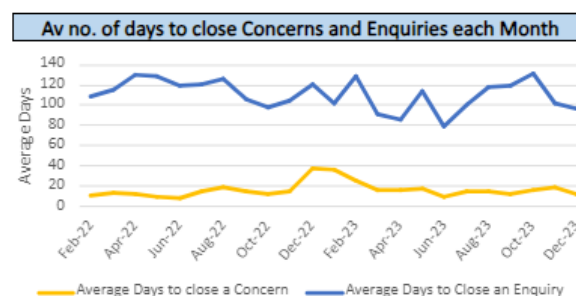
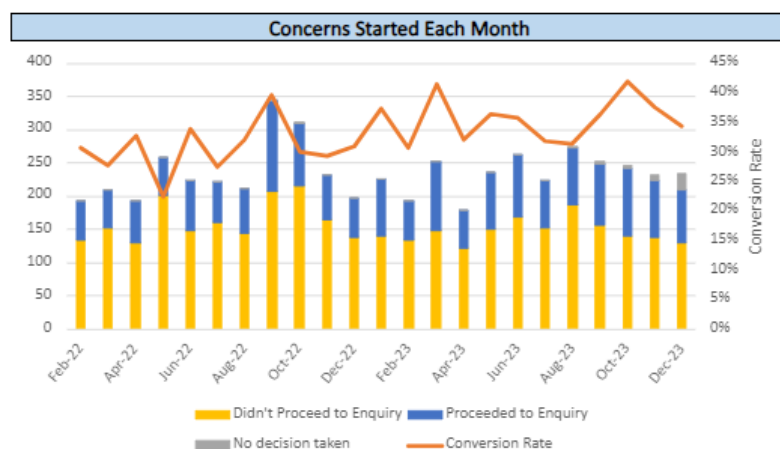
An investment proposal has been implemented using the Market Sustainability and Improvement Fund to address this and improvements can be seen in a small decrease in those waiting reviews. Further improvements are expected over the next quarter

4.6 Safeguarding

Safeguarding means protecting an adult's right to live in safety, free from abuse and neglect. It is about people and organisations working together to prevent and stop both the risks and experience of abuse or neglect, while at the same time making sure that the adult's wellbeing is promoted including, where appropriate, having regard to their views, wishes, feelings and beliefs in deciding on any action.



Open Safeguarding Enquiries			
	Number	Av. Days	Max Days
ACS Safeguarding Team	153	85	368
Hospital Social Work Team			
Learning Disability Team	5	85	315
OPMHT	16	93	232
Community Mental Health Team			
Strategic Adults Safeguarding Team	21	139	477
Discharge To Assess Heathlands			
Operation Crawton	54	382	567
Total	249	154	567



Active DoLS Requests			
	Urgent	Standard	Total
Waiting for Assessment	2	83	85
Processing	7	13	20
Total	9	96	105

How does Bury Compare?

Metric	Bury	Rank in Northwest (out of 22)
Conversion Rate	28%	8 th
Making Safeguarding Personal - Asked	56%	20 th
Making Safeguarding Personal - Outcomes	39%	18 th

Last Updated: Q2 2023/24

Safeguarding - commentary

The data above shows some important trends and an improving picture for Adults Safeguarding in Bury. The measurements "How does Bury Compare?" was taken before the completion and rollout of the safeguarding dashboard and the data in the graphs above is taken directly from the safeguarding dashboard in October 2023. As described below, care must be taken when being ranked out of the neighbouring authorities in conversion rate. Having a 'high conversion rate' is potentially not a sign of effective practice.

A good conversation rate, according to our Head of Adult Safeguarding should sit between 30% - 40% which means around 3 – 4 safeguarding concerns are proceeding to an S.42 enquiry. If the rate is low (<20%) then Bury Council is probably receiving too many inappropriate safeguarding concerns; too high (>50%) then Bury Council is probably not receiving enough safeguarding concerns and abuse may be taking place but not being reported. The rationale for the 28% (which is lower than ideal) is due to an ongoing organisational safeguarding in which many safeguarding concerns have been linked to the organisational safeguarding rather than investigated as individual S.42 enquiries. This is acceptable practice, and has been discussed with individuals, families and representatives. Currently our conversation rate sits at almost 35%.

Ensuring we are asking outcomes during the safeguarding process is our obsession and is key to the strategy of making safeguarding everyone's business. We have improved from the low rate of 54% to 87% through data analysis, improvement work and communications across the adult social care system. There is further work to do in this area, including some work on the recording system to support front line practitioners to record outcomes more effectively.

There is no statutory timeframe for S.42 enquiries under the Care Act 2014. However, our average time for completion of S.42 enquiries was far more than 100 days, which without rationale does raise questions around timely completion. Over the last 6 months we have worked with the staff to understand why this is and set up some Key Performance Indicators to support the staff in the expectations of the Senior Leadership Team. We have seen a good reduction in time to complete S.42 enquiries with most teams now averaging under 100 days. We continue to work on the administration and to support our social staff to dedicate time to completing their paperwork and recording promptly on the systems.

Operation Crawton (Edenfield) is concluding from a safeguarding perspective, and we are currently working with our neighbouring authorities to close their S.42 enquiries. There has been some delay in some areas due to differences in practice and sickness in those areas. However, we are hopeful that by the next reporting cycle all Operation Crawton s.42 enquiries will be closed.

4.7 Complaints and Compliments

Complaints

Period 2023/24	Number of complaints received	Decision			20 working day timescale	
		Upheld	Partially Upheld	Not Upheld	Within	Outside
Q3	11	2	6	2	5	

Compliments

Period 2023/24	Source		
	Person receiving or had received services	Relative of person receiving or had received services	Other (incl. various survey responses)
Q3	12	22	148

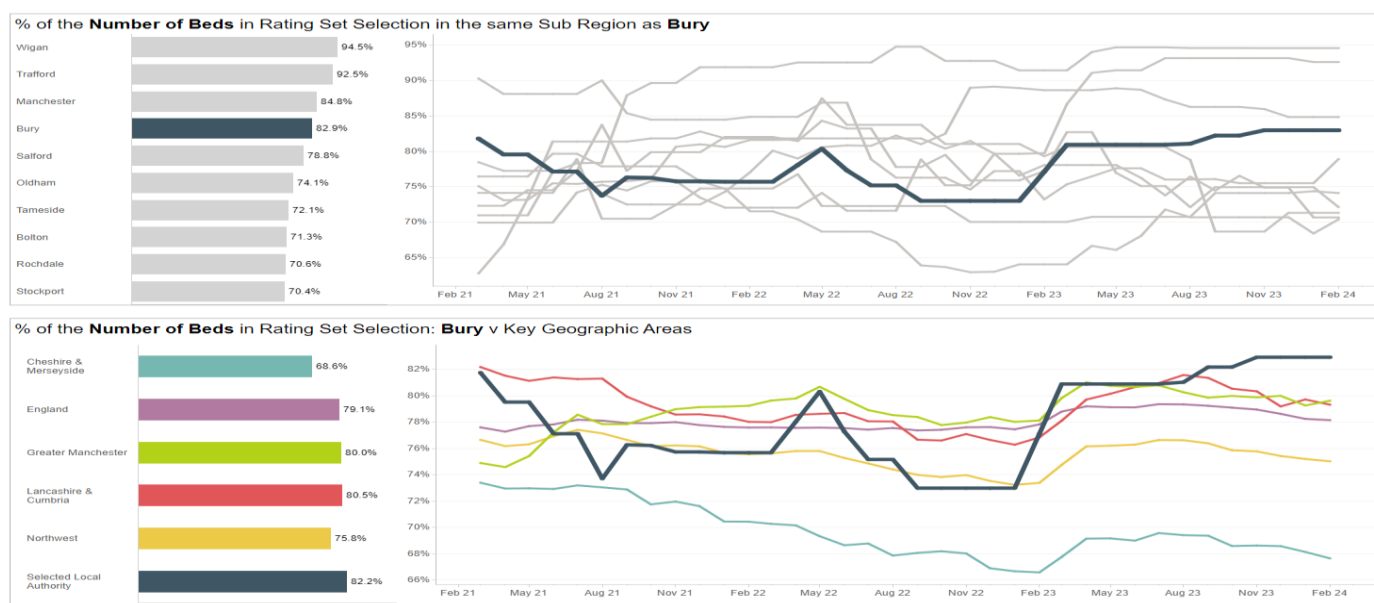
Complaints and Compliments - Commentary

Complaints remain steady and below last year's levels which indicates learning is being implemented and improvement in services.

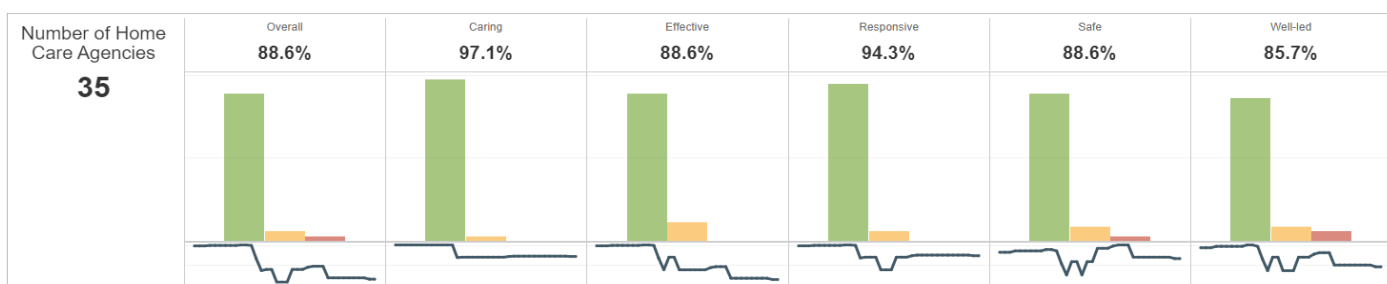
Compliments continues to be high especially for where we provide services directly such as our equipment services and our intermediate care services.

4.8 State of the Care Market

Number of care home beds rated good or outstanding.



Quality Ratings of Bury's Home Care Agencies



Last Updated: Q4 2022/23

State of the Care Market - commentary

The top charts show the quality ratings of care homes in Bury compared to the rest of Greater Manchester showing the % of beds rated good or outstanding. The second chart shows Great Manchester compared to the other regions in England and the Northwest. The final chart shows the rating of home care agencies operating in Bury. For both charts the nearer to 100% the better.

Adult Social Care Providers in Bury have historically performed well compared to neighbouring authorities in achieving Good and Outstanding CQC ratings. In 2019 Bury was joint top of Greater Manchester Local Authorities in Good and Outstanding Care providers. Since the outbreak of the COVID pandemic, a noticeable drop in quality has been identified within care providers, with care homes especially being particularly affected. This resulted in a number of care homes being rated Inadequate by CQC, however, as the data shows, the Local Authority have worked hard to support those homes back to compliance while proactively identifying other providers in need of improvement support. This has seen the overall quality picture in Bury improve greatly while the work being carried out on the Council's Quality Assurance and Improvement Framework will only enhance this further.

The overall quality of our care services has increased this month with 82.9% of our care home beds now rated Good or better which is better than the England average and the average of all Northwest regions

4.9 Adult Social Care recently published data 2022 to 2023

Published 7th Dec 2023

NHS-E Adult Social Care Outcomes Framework 22-23 - [Interactive Report](#)



Key Findings

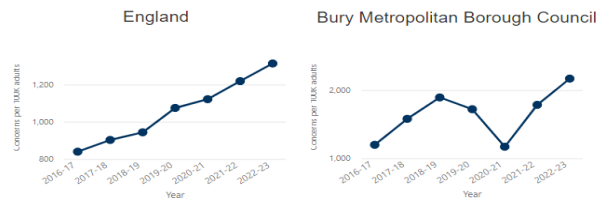
Select a Local Authority on the right (by searching or scrolling through the local authorities) to see the comparative figures for the selected local authority and England

Please select one local authority from the dropdown menu

Bury Metropolitan Borough Council

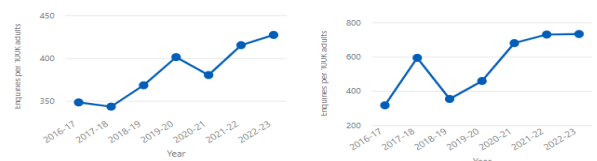
Safeguarding Concerns received during 2022-23

The total number of Safeguarding Concerns reported by local authorities between 1st April 2022 and 31st March 2023 was **687,970** which is an **increase of 9%** from 2021-22 (541,535).



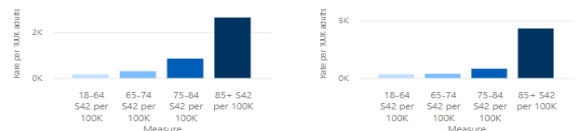
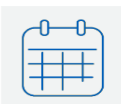
Section 42 and Other Enquiries commenced during 2022-23

The total number Section 42 and Other Enquiries reported by local authorities between 1st April 2022 and 31st March 2023 was **191,190** which is an **increase of 4%** from 2021-22 (184,510).



Age of individuals involved in Section 42 Enquiries

The majority of individuals involved in Section 42 Safeguarding Enquiries reported by local authorities between 1st April 2022 and 31st March 2023 were age 85 and over, approximately 1 for every 38 adults aged 85 and over in England.



NHS-E Safeguarding Adults Collection 22-23 - [Interactive Report](#)



Key Findings

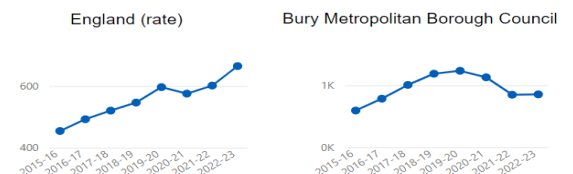
Select a Local Authority on the right (by searching or scrolling through the Local Authorities) to see the comparative figures for the selected Local Authority and the related region.

Please select a Local Authority from the dropdown menu

Bury Metropolitan Borough Council

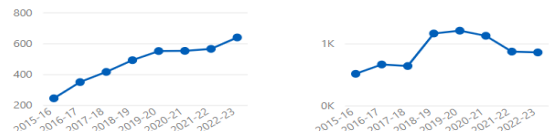
Applications received in 2022-23

The total number of applications reported by Local Authorities as received between 1st April 2022 and 31st March 2023 was **300,765** which is an **increase of 11%** from 2021-22 (270,650).



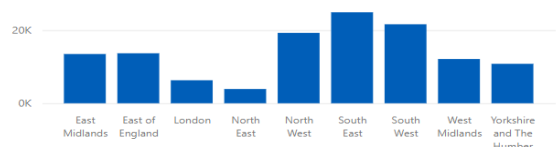
Applications completed in 2022-23

The total number of completed applications reported by Local Authorities as completed between 1st April 2022 and 31st March 2023 was **289,150** which is an **increase of 14%** from 2021-22 (254,215).



Applications not completed as of 31st March 2023

The total number of applications reported as not completed as of 31st March 2023 was **126,100**.



NHS-E Deprivation of Liberty Safeguards 22-23 - [Interactive Report](#)

Commentary

This newly published data shows our performance with safeguarding enquiries and number of deprivation of liberty safeguards during 22 to 23

A deprivation of liberty safeguard is a protection offered to people who don't have the capacity to consent to receiving care and support or residing in a specific care home

This shows increases in both in line with those found in England.

Appendix - Data sources and what good looks like

Section	Chart	Data Source	What does good look like?
Contacts	Number of Adult Social Care (ASC) Contact Forms recorded each month.	Contact Records in LiquidLogic: Contact Type Contact Outcome	Six Steps to Managing Demand in Adult Social Care: ≈ 25% of contacts go on to receive a full social care assessment.
	GM Comparison		
Waiting Lists	Waiting List Summary	Professional Involvement in LiquidLogic: Awaiting allocation work trays Brokerage Work trays Overdue Review Tasks DoLS data from the database.	Lower is better
	Needs and Carers Assessments: No of Cases Waiting for Allocation		
	GM Regional Comparison		
Assessments	Number of Adult Social Care (ASC) Assessments Completed each month	Assessment forms in LiquidLogic	
	GM Regional Comparison	Av. number of days from the contact start date to the assessment end date	Lower is better
Services	Number of Intermediate Care (short-term) services completed each month	All IMC Service data from 4 data sources	
	Number of Long-term Adult Social Care services open on the 1 st of each month.	Service data from Controcc Grouped by Service Type Count of service types, not people	
	Proportion of Home Care vs Nursing and Residential Care Services compared against 2 years ago		Lower Residential & Nursing Care is better
	Northwest Regional Comparison		
Reviews	Number of Adult Social Care Reviews Completed each month	Review forms completed in LiquidLogic	Higher number of completed reviews. Lower proportion of Unplanned reviews.
	Number of Overdue Adult Social Care Reviews on the last day of each month	Review Tasks in LiquidLogic past the due date	Lower is better
	Regional Comparison	As above	
Safeguarding	Percentage of people who have their safeguarding outcomes met	Completed safeguarding enquiries: Making Safeguarding Personal questions	Higher is better
	Outcomes were achieved		
	Open Safeguarding Enquiries	Safeguarding enquiry forms on LiquidLogic and CMHT/EIT spreadsheets	Target: Enquiries closed in 56 days or less
	Concerns Started Each Month	Contact Forms on LiquidLogic: form type safeguarding concerns	
	Average number of days to close Concerns and Enquiries each month	As above	Targets: Concerns closed in 3 days or less. Enquiries closed in 56 days or less
	Regional Comparison	As above	Higher is better



Classification: Open	Decision Type: Key
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Report to:	Cabinet	Date: 13 March 2024
Subject:	Proposed Review of the Persona Shareholder Agreement	
Report of	Cabinet Member for Health and Wellbeing	

Summary

1. Persona Group Ltd (Persona) is a not-for-profit Local Authority Trading Company (LATCO) wholly owned by the Council set up to deliver a wide range of care and support services for older adults and people with learning disabilities. Its current contract with the Council was signed in April 2021 and has a ten-year term until 31st March 2031.
2. It provides supported living accommodation based services to people living with learning disabilities as well as shared lives, respite and day support.
3. For older adults it provides day care, respite and intermediate care.
4. It is rated Good by the CQC, is financially stable and has good employee relations, it is a real living wage provider and most recently acquired the Good Employment Charter. It has proved itself to be well led and successful.
5. Set up with its own Board of Directors it operates with the Council as its sole shareholder. A Shareholder Agreement entered into in 2015 is currently in place which governs the relationship between the two bodies.
6. Whilst the Shareholder Agreement entrusts the day to day running of the company to the Board of Persona it still requires many elements to be referred back to Committees of the Council for a decision. This relates in particular to decisions regarding growth, service expansion and change.
7. In recognition of the success of Persona, its proven ability to deliver high quality services and its smooth-running working operation, it is felt that now is the appropriate time to review the Shareholder agreement. This is with a view to explore if it can be adapted to deliver greater flexibility to Persona and its Board whilst not affecting the necessary control powers the Council retains.
8. This will ensure the company's ability to grow as well as adapt its care models more rapidly in response to its users preferences enabling more highly person centred care, ensuring its sustained position as a high quality care provider of choice

Recommendation(s)

9. The Cabinet Member for Health and Adult Care requests authorisation from Cabinet to review the Persona Shareholder Agreement and report back with recommendations at a later date.

Reasons for recommendation(s)

10. To explore the potential for providing Persona with greater flexibility in decision making to facilitate growth in high quality service delivery by a local company which provides giving a strengths-based approach to care and support of older residents and those living with learning disabilities.

Alternative options considered and rejected

11. Do nothing – Persona will be unable to respond fully to the department of health and adult care commissioning intentions and potentially miss out on growth opportunities.

Background

12. As a LATCO Persona working with the Council has benefitted from use of the *Teckal* exemption, now referred to as a vertical arrangement under the Procurement Act 2023. It permits organisations wholly owned or controlled by a public body to avoid the requirement to carry out competitive procurement. This should make the company more responsive and able to align service development and delivery to the strategic and operational commissioning requirements of the adult social care department. This greater opportunity for co-operation between the Council and the company should enable both to thrive.
13. During recent commissioning and service development programmes carried out by the Health and Adult Care Department despite increased cooperation between the Council and Persona and the availability of the *Teckal* exemption Persona has been unable to respond with the agility required to meet the commissioning requirements of the Health and Adult Care department.
14. In 2023 the Cabinet agreed an ambitious housing strategy for people with care and support needs. This has seen many new housing developments totalling over £2.5m bought into the borough already and much needed care provision developed within these new housing schemes, all at no additional cost to the council. Despite the Council being able to use a *Teckal* exemption for procuring services from Persona, our borough's largest provider of learning disability services, Persona has not been able to benefit from the opportunity to deliver some of these services and as such has missed out on growth.
15. An analysis of the reasons why has found that some elements of the decisions required to grow the Company required referral back to council committees and

this delayed the development of the services. In a number of instances independent providers progressed offers at greater pace and were able to respond in a timelier fashion to the commissioning needs of the Health and Adult Care department.

16. In addition, it is also common for care providers to develop their own housing and care schemes and offer these to the Council, again this is something that Persona is currently unable to do.
17. Work has started to explore how the company could cooperate more greatly with the health and care department in service development. This has identified that changes to the shareholder agreement need to be explored to make this happen. It is important to enable the company to be responsive and nimble whilst at the same time ensuring the parameters of utilising the *Teckal* exemption are not exceeded.
18. This is a complex piece of work and will require support from Persona, the health and adult care department and the Council's legal team that may result in review of the governance of Persona, how they decide what activity they currently do and what they might do in the future.

Report Author and Contact Details:

Name: Adrian Crook

Position: Director of Adult Social Services

Department: Health and Adult Social Care

E-mail:

Links with the Corporate Priorities:

19. Local – persona is a local company, supporting local people with care and support needs and employing local people in good quality jobs
 20. Enterprising – delivery of a refreshed shareholder agreement will ensure Persona is able to maximise its potential.
 21. Together - the Persona Shareholder Agreement review will be a joint participative exercise between Persona and the Council.
-

Equality Impact and Considerations:

22. Not applicable at this stage
-

Environmental Impact and Considerations:

23. Not applicable at this stage

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation

Legal Implications:

It is clearly desirable to review the 2015 Shareholder Agreement to ascertain if it is fit for purpose and is sufficiently flexible to meet the needs of stakeholders going forward. However, Cabinet in agreeing any changes in due course will need to be satisfied that appropriate controls remain in place enabling the Council to deal with any future problems which might arise.

Financial Implications:

The recommendation is to review the shareholder agreement, therefore there will be no financial implications.

Appendices:

None.

Background papers:

None.

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

Term	Meaning
LATCO	Local Authority Trading Company



Classification: Open	Decision Type: Non-Key
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Report to:	Cabinet	Date: 13 March 2024
Subject:	Quarter 3 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 three 2023/24 based on the information known as at 31 December 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.

Recommendation(s)

2. The Cabinet is asked to:
 - a. note the improved forecast overspend of £9.462m largely due to increased demand on services within the revenue budgets at Quarter two and the recovery action proposed.
 - b. note the slight improvement in £18.555m deficit on the Dedicated Schools Grant (DSG) and the ongoing activity within the Project Safety Valve project (PSV).
 - c. note the increased delivery of savings to date of £16.384m with a forecast savings delivery of £20.646m within the challenging context of increased demand and inflationary cost increases. The intention is in the MTFS for 2024/25 that all savings will be delivered or replaced by something of an equal value by the departments.

Reasons for recommendation(s)

3. To update Members on the Council's 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.

Report Author and Contact Details:

Name: Paul McKevitt

Position: Interim Executive Director of Finance

Department: Finance

E-mail: paul.mckevitt@bury.gov.uk

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 sets out the position for both revenue and capital budgets and presents a current revenue forecast overspend of £9.462m. The details by department and the programme of action to address this are included in Appendix 1. The financial position has slightly improved by £0.334m from that reported at quarter two when the forecast overspend at the end of the year was projected to be £9.706m. The quarter one forecast position was £13.266m.

The remaining unmitigated overspend at the year-end will impact on reserves however a review of reserves has taken place as part of setting the 2024/25 and the deficit has been taken account of.

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 and quarter 3 position however, there remains significant pressures.

The Council continues to review the in-year position at the Executive Delivery Board meetings to mitigate in year pressures. The Executive Delivery Board reviews progress on delivery of 23/4 savings programmes and to identify if any of the 24/5 approved savings programmes can be brought forward to support the Councils' overall financial position. This 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 £11.279m at quarter three an increase on the quarter two position by £0.334m. The increase is due to Social Care and Safeguarding residential placements because 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 £3.940m, which includes costs previously funded through DSG which following a review last year end have been transferred to the general fund. This is a slight reduction of £0.156m since quarter two.
9. A detailed review was undertaken on the Children and Young Peoples

budget as part of setting the 2024/25 budget and the budget has been uplifted to address the budget pressures and fund forecast growth. This overspend is therefore not expected to continue into 2024/25.

10. 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 2023.
11. Adult social care are reporting an overspend of £0.855m which is a reduction of £0.290m on quarter two position 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. There is a risk that 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.
12. The operations budget is forecasting £1.803m an increase of £0.163m since quarter two which mainly relates to increased energy forecasts. There are significant pressures experienced across the service of which further details are in appendix 1.
13. The budget to fund the financing of the capital programme is within the non-service specific budget which is reporting an underspend of £4.797m which is largely due to the re-phasing of the capital programme and additional income from investments. The overspend is still being reviewed alongside the review of savings delivery to continue to reduce the forecast year end position and reduce the need to use reserves.

Savings 2023/24

14. The Council has a challenging savings target of £23.971m to deliver this financial year and to date has successfully delivered £17.947m at the end of quarter three with total savings of £22.268m forecast for the full year. The successful delivery of 93% of the savings target in the context of rising demand and other national and regional pressures reflected locally represents a considerable achievement for the Council.
15. The in-year savings referred to above include permanently embedded savings and some smaller one-off savings which in addition to the £1.644m equate to a total of £3.408m needing to be delivered on a permanent basis during 2024/25. However, £2.908m of these savings will

still be achieved from existing planned projects but for reasons given below have necessitated reprofiling over future financial years.

16. When savings achieved and forecasted in 23/24 are aggregated with the reprofiled savings the shortfall in the total savings targets set for 23/24 is £0.500m, a gap of 2%.

17. The reprofiled targets and associated projects are as follows:

- £0.192m for LED lighting will be achieved in the Operations budget in 24/25. The delay has been caused by the lack of availability of external contractors to undertake the necessary work.
- The HAC directorate is reporting a £0.332m net saving shortfall at quarter 3 which is being driven in two areas:
 - Working Age Adults savings initiatives are subject to appropriate accommodation being available and legal process being completed, consequently, where there is delay in transitioning to suitable accommodation there is a delay in the saving being achieved which is now expected to be in 24/25.
 - Housing Complex Care saving delivery is being negatively impacted due to property completion dates slipping and is expected to be delivered in 24/25.
- £0.400m of children placements savings which, due to the in-year increase in demand will now be delivered in 26/27. Alternative plans are in place to deliver the savings in 24/25 through additional contribution to high-cost placements from Health and a reduction in transport costs.
- The saving target of £0.845m associated with the rationalisation of council buildings to reduce maintenance costs and generate capital receipts will be achieved as rental income from Health partners located in Pennie £0.125m in 24/25 and £0.375m in 25/26 with the remaining £0.345m being delivered from further rationalisation and small asset disposals in 24/25 (£0.095m) and 25/26 (£0.250m). There is potential to increase the value of these savings when work on the Forward Asset Plan business case is completed.
- Savings of £0.664m associated with planned moves towards further digitalisation have proved difficult to implement and plans and implementation methodology are now being reviewed with a further report being prepared. Full year implementation is not expected until the end of 24/25 and the savings have therefore been re-profiled to be achieved in 25/26.
- The Home Support Service and HRA target of £0.425m has a plan in place for £0.150m to be achieved in 2024/2025 and a review of the HRA is expected

to deliver efficiencies of the remaining £0.275m due to the insourcing of the service, this also been reprofiled to 24/25.

- Savings of £0.050m associated with a reduction in external fees and charges are proving difficult to achieve in the context of additional work needing to be undertaken but Directors continue to reevaluate commissioning and requirements, and the savings have been reprofiled to 24/25.

18. The remaining shortfall in savings of £0.500m are within the Operations Directorate including Highways (£0.076m), Transport (£0.070m), Commercial Services (£0.232m) and Waste recycling (£0.122m). The original planned targets have proved difficult to secure due to a variety of internal and external factors including demand. However, the Directorates management team are committed to the savings targets and are currently developing alternative mitigations, to be delivered in 24/25, subject to Cabinet approval.

19. When approved all the above savings' projects will be supported by more a formalised project and delivery plan process to be monitored monthly and scrutinised by the Executive Delivery Board on a regular basis.

Capital Programme and Prudential Indicators

20. 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 £74.507m, from £144.588m to £70.081m, the savings in the cost of borrowing as a result of the programme slipping has been reflected within Non – Service Specific revenue budget.

21. CIPFA Prudential Code (2021) sets out the requirement for the prudential indicators to be reported on a quarterly basis. The Authority measures and manages its capital expenditure and borrowing with references to the indicators set out within the appendix 3 to this report.

Conclusion

22. The financial position remains very challenging but there has been a positive improvement of £3.804m in the forecast between quarter one and quarter three. This reduction in the forecast overspend is predominantly due to savings achieved within Capital Financing due to the re-phasing of the Capital Programme.

Officers are working hard to mitigate in year overspends and to reduce the quarter three forecast reported further by the end of the financial year.

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.

As this is in year budget monitoring of the budget approved by Council in February 2023, there is no need for an Equality Impact assessment to be carried out.

Environmental Impact and Considerations:

This is a monitoring report and, as such, there are no environmental impacts.

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.
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Legal Implications:

This report updates Members of the Council’s financial position in line with the Council's financial framework, it follows from the suite of reports which were considered at Budget Council in February 2024. This report sets out for Members the financial position as at quarter one and details the on-going work to mitigate overspends and deliver budget savings.

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 Prudential Indicators

Background papers:

None.

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

Term	Meaning
DSG	Dedicated Schools Grant
PSV	Project Safety Valve
DFE	Department For Education
HAC	Health and Adult Care

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Appendix 1

Financial Year 2023/24

Appendix 1: Quarter 3 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 £9.462 m. Any remaining unmitigated overspend at the year-end will impact upon the available reserves.

Table 1 – Forecast Outturn against Budget 2023/24

Appendix A	Current Budget	Projected Outturn	Quarter 3 Variance	Quarter 2 Variance	Movement from Quarter 2
	£m	£m	£m	£m	£m
Business, Growth and Infrastructure **	1.048	1.096	0.048	0.082	(0.034)
Children and Young People	40.852	52.131	11.279	10.085	1.194
Corporate Core Services	16.218	16.425	0.206	0.033	0.173
Corporate Core Finance	9.664	9.731	0.067	0.011	0.056
Housing General Fund	(0.079)	(0.079)	0.000	0.000	0.000
Non-Service Specific	27.943	23.146	(4.797)	(3.200)	(1.597)
Health and Adult Care	79.226	80.081	0.855	1.145	(0.290)
Operations	15.403	17.206	1.803	1.640	0.163
Total forecast over / (under) spend	190.274	199.737	9.462	9.796	(0.334)

Business, Growth, and Infrastructure - £0.048m adverse variance

Business, Growth and Infrastructure	Current Budget	Projected Outturn	Quarter 3 Variance	Quarter 2 Variance	Movement from Quarter 2
	£m	£m	£m	£m	£m
BGI Central Budget (Fees & Charges Savings)	0.000	0.000	0.000	0.244	(0.244)
Strategy, Planning & Regulation	0.550	0.528	(0.022)	(0.007)	(0.015)
Land & Property	(1.706)	(1.196)	0.510	(0.033)	0.543
Regeneration Delivery – Major Projects	0.133	0.145	0.012	0.001	0.011

Regeneration Delivery Economic Regeneration	–	0.615	0.549	(0.066)	(0.047)	(0.019)
Housing Needs & Options		0.516	0.424	(0.092)	0.043	(0.135)
Strategic Housing		0.139	0.083	(0.056)	(0.051)	(0.005)
Urban Renewal & Adaptations		0.142	0.116	(0.026)	0.003	(0.029)
BGI Management Team		0.659	0.447	(0.212)	(0.069)	(0.143)
Total forecast over / (under) spend		1.048	1.096	0.048	0.082	(0.036)

Business, Growth, and Infrastructure - Financial Headlines

BGI Department, including the Housing Needs & Options service, is forecasting a £0.048m overspend which is a favourable movement of £0.036m from the Quarter 2 position.

There has been an adverse movement within Land & Property of £0.543m due to a number of reasons including:

- The movement of a savings target relating to additional income from a generic BGI budget line to the general property lettings code - £0.244m.
- Unbudgeted costs of £0.150m for repairs and additional security at the Seedfield Site due to an incursion onto the site.
- Unbudgeted management fees in relation to Q-Park Bury and unbudgeted repairs & maintenance costs across the commercial estate of £0.071m.
- Internal recharges in relation to roof repairs at Radcliffe Library and Textile Hall Floor Finishes. £0.052m

BGI Management team is showing a favourable variance against budget of **(£0.212m)**. This is mainly due to in year vacancy factor savings exceeding the target and the additional work being carried out by staff on capital projects or in relation to the HRA meaning resulting in recharging those costs as appropriate.

Children and Young People - £11.279m adverse variance

Children and Young People	Current Budget	Projected Outturn	Quarter 3 Variance	Quarter 2 Variance	Movement from Quarter 2
	£m	£m	£m	£m	£m
Children's Commissioning	0.406	0.414	0.008	0.044	(0.036)
Early Help & School Readiness	4.520	3.757	(0.763)	(0.753)	(0.010)
Children's Services Management and other costs	0.349	0.963	0.614	0.385	0.229
Education and Inclusion	9.787	13.727	3.940	4.096	(0.156)
Social Care and Safeguarding	25.790	33.270	7.480	6.313	1.167
Total forecast over / (under) spend	40.852	52.131	11.279	10.085	1.194

Children and Young People - Financial Headlines

The Children and Young People department is forecasting to overspend by £11.279m as at Quarter 3 (£10.085m at Quarter 2) with a £7.480m forecast overspend on Social Care and Safeguarding and a £3.940m 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.

The 2024/25 budget includes an uplift to the base budget to address the pressures identified in 2023/24 and to fund forecast growth in 2024/25.

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 9. A budget reduction of £0.200m for Short Breaks and Personal Budgets has been identified as unachievable. A review has been completed on packages with the potential to maximise contributions from Health partners where possible, and the transfer of Section 17 expenditure within the service (nil impact for Children's services overall). Further work is now required on securing additional contributions for these packages. There also remains £0.200m of undelivered savings relating to 2022/23 savings programmes. As at month 9, the saving for external placements (£0.200m) is considered to be unachievable.

Social Care and Safeguarding – £7.480m forecast adverse variance.

The residential placements budget for children including those with a disability is projected to overspend by £4.984m at Quarter 3 (£4.089m at Quarter 2) 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 meeting 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 3 by £1.890m (£1.915m at Quarter 2) of which £0.900m 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 - £3.940m forecast adverse variance.

Home to School Transport is reporting a forecast overspend of £1.913m at Quarter 3 (£1.868m at Quarter 2). There has been an increase in demand for this service alongside inflationary costs which have also contributed to this adverse variance. The implementation of a new software system has enabled the service to be efficient in the number of routes required, however the number of children requiring the service has reduced any benefit of this implementation.

School crossing patrols are expecting to overspend by £0.235m (£0.280m at Quarter 2) 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 3 (no change from the £0.376m reported at Quarter 2). 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 £1.324m (£1.275m at Quarter 2). The Short Breaks service is the largest contributing area to this adverse variance at £1.333m which in part is due to the unachievement of a

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 (£0.763m) in Early Help and School Readiness which is a result of several vacancies being held across the service area.

A detailed review was undertaken on the Children and Young Peoples budget as part of setting the 2024/25 budget and the budget has been uplifted to address the budget pressures and fund forecast growth. This overspend is therefore not expected to continue into 2024/25.

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 - £0.206m overspend

Corporate Services	Core	Current Budget	Projected Outturn	Quarter 3 variance	Quarter 2 variance	Movement from Quarter 2
		£m	£m	£m	£m	
Chief Information Officer		6.754	6.741	(0.013)	(0.089)	0.076
Communications & Engagement		1.235	0.505	0.051	0.069	(0.018)
Legal & Democratic Services		4.274	4.630	0.240	0.102	0.138
People & Inclusion		4.429	4.389	(0.060)	(0.041)	(0.019)
Senior Management		0.222	0.160	(0.011)	(0.007)	(0.004)
Total forecast over / (under)spend		16.914	16.425	0.206	0.033	0.173

Corporate Core Services financial headlines

The Corporate Core Services budget is forecast to overspend by £0.206m at quarter 3, a worsening of £0.173m from the position at quarter 2. The areas of overspend had pressures identified as part of the Zero-Based Budget Exercise, as such the budgets will be aligned for 2024/25 once approved at budget council, removing the overspend in future years. Included within the budget is a saving target of £0.591m which is forecast to be fully achieved.

Legal and Democratic

Legal and Democratic services is overspending by £0.240m which is due to the net increase in the cost of staffing and agency of £0.255m as recruitment has been challenging due to current market conditions, an overspend on Coroners Court costs of £0.079m, offset by additional forecast income of £0.054m and an underspend in relation to Members Allowances of £0.054m.

The Chief Information Officer

The Chief Information Officer service has an overall underspend of £0.013m. This includes a one off overspend within ICT of £0.276m in relation to the costs of migration to cloud based services. This is offset with underspends within Strategic Partnerships, Adult Learning and Performance and Intelligence services in relation to reductions due to the moratorium on expenditure, (£0.155m), reduced staffing costs, (£0.093m) and additional income (£0.033m).

People and Inclusion

The People and Inclusion service has an overall underspend of £0.060m.

Communications and Engagement

The Communications and Engagement service is forecast to overspend by £0.051m which is due to a partial underachievement of the savings target in relation to a service review and staffing costs.

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 - £0.067m overspend

Corporate Finance	Core	Current Budget	Projected Outturn	Quarter 3 Variance	Quarter 2 Variance	Movement from Quarter 2
		£m	£m	£m	£m	£m
Corporate Finance	Core	0.000	0.000	0.000	0.000	0.000
Deputy Finance	Director of	5.769	5.974	(0.033)	(0.059)	0.026
Executive Finance	Director of	3.895	3.859	0.100	0.069	0.031
Total	forecast over / (under) spend	9.664	9.296	0.067	0.011	0.056

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 children's services.

Housing General Fund - £0.000m variance.

Housing General Fund	Current Budget	Projected Outturn	Quarter 3 Variance	Quarter 2 Variance	Movement from Quarter 2
	£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 - £4.797m favorable variance

Non-Service Specific	Current Budget	Projected Outturn	Quarter 3 Variance	Quarter 2 Variance	Movement from Quarter 2
	£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)	(0.039)	0.000
Corporate Management	0.727	0.645	(0.081)	(0.081)	0.000
Cost of Borrowing	5.487	1.639	(3.847)	(3.561)	(0.286)
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	(4.725)	(6.015)	(1.290)	0.469	(1.759)

Bury Market Roof RAAC Issues	0.181	0.181	0.000	0.000	0.000
Redundancy Costs	0.000	0.450	0.450	0.000	0.450
Total forecast over / (under) spend	34.066	30.866	(4.797)	(3.200)	(1.597)

Non-Service Specific financial headlines

The Non-Service Specific (NSS) budget variance has increased from a £3.200m underspend at Quarter 2 to a £4.797m underspend at Quarter 3.

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 £3.847m favourable

The underspend on Cost of Borrowing has increased by £0.286m from Quarter Two. Two Lender Option Borrower Option (LOBO) loans were called by the provider and were repaid in Quarter 3. This has led to a reduction in LOBO loan interest payments of £0.183m however Temporary Loans have increased resulting in additional Temporary Loan Interest costs of £0.083m in Quarter 3. In addition, investments have generated an additional £0.187m over budget due to better interest rates being received.

Provisions/Reserves £1.290m favourable

There are a number of centrally held savings included within provision and reserves. The forecast underachievement of savings of £1.469m reported at Quarter 2 has been mitigated by budgets that are not needed in this financial year as a one-off.

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

There is also a surplus budget for the 2023/24 pay award held under Non-Service Specific resulting in a forecast underspend of £0.587m.

Redundancy Costs £0.450m unfavourable

Redundancy costs of £0.450m previously held within Children and Young People's budget have been transferred to Non-Service Specific and the reason for the adverse variance between quarter 1 and quarter 2.

Health and Adult Care (formerly OCO) - £0.855m Overspend

Appendix A	Current Budget	Projected Outturn	Quarter 3 Variance	Quarter 2 Variance	Movement from Quarter 2
	£m	£m	£m	£m	£m

Adult Social Care Operations	7.393	7.192	(0.201)	(0.257)	0.056
Care in the Community	46.998	48.109	1.111	1.595	(0.484)
Commissioning and Procurement	15.391	15.542	0.151	0.000	0.151
Departmental Support Services	(0.835)	(0.860)	(0.025)	(0.014)	(0.011)
Workforce Modernisation	0.078	0.078	0.000	0.000	0.000
Public Health	10.201	10.020	(0.181)	(0.180)	(0.001)
Total forecast over / (under) spend	78.261	79.406	0.855	1.145	(0.290)

Financial Position

The Health and Adult Care (HAC) budget is forecast to overspend by £0.855m at quarter 3 which is a £0.290m improvement on the position reported at quarter 2.

Adult Social Care Operations - £0.201m underspend

The Adult Social Care Operations budget is forecast to underspend by £0.201m, which is a £0.051m decrease on the underspend reported at quarter. The decrease is due to revised staffing budget forecasts within Operational staffing budgets.

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 - £1.111m Overspend.

The Care in the Community budget is forecast to overspend by £1.111m which is a £0.484m improvement on the forecast reported at quarter 2. The improved position between quarter 2 and quarter 3 is due to reducing activity across home care and residential settings. However, there is a risk that over the remaining winter months additional demand may result in a further increase in the overspend.

The main drivers of the overspend are:

- An overall increase in demand for Home Care packages as a result of supporting hospital discharges into home care settings albeit activity has slowed between quarter 2 and quarter 3.
- New 'in year demand' demand or increases to existing care packages.

- Legacy demand pressures because of Covid Hospital Discharge policy.

Commissioning – £0.150m Overspend

The Commissioning and Procurement Budget is forecast to overspend by £0.151m and is a £0.151m worsening of the position reported at quarter 2.

The overspend on commissioning budget is largely driven by:

- Additional staffing costs at Persona regarding delivery of supported living services.
- Slippage in delivery of Persona savings. However, a definitive plan is in place to deliver the historic unachieved savings relating to Persona. The plans assure savings delivery will be successful over the period 2023/24-2024/25.

Public Health - £0.180m Underspend

The Public Health budget is forecast to underspend by £0.180m which was the position reported at quarter 2. The underspend is due a small staffing budget underspend and activity being lower than forecast within two Public Health contracts.

2023/24 HAC Saving Programme Delivery Status

The 2023/24 HAC saving programme is £7.761m and has delivered £6.542m (77%) of savings as at month 9. The current HAC savings delivery forecast projects a £0.332m shortfall by March 31, 2024.

The table below analyses the delivery of the Cabinet agreed HAC savings programme by Adult Care and Public Health service areas.

HAC Directorate	Savings Target	Savings Achieved Year to Date	Total Savings Expected to be Achieved	Variance
Adult Care	7,602	5,806	7,270	-332
Public Health	159	159	159	0
Total	7,761	5,965	7,428	-332

Delivering the Historical HAC Directorate Savings Shortfall

The total savings shortfall regarding 2021/22 and 2022/23 HAC savings programmes was £1.546m. The historic saving shortfall has now been met.

New/Additional Savings

In addition, as part of in year savings initiatives, a further £0.067m of new/additional savings have been achieved within Neighbourhood Housing Support services.

Rolling Actions to Deliver HAC Directorate Savings

During 2023/24 the HAC Directorate will continue to undertake several actions to mitigate any savings shortfall with regards to achieving the 2023/24 savings programme, including:

- Continuous dialogue with Persona to ensure the reprofiled savings programme is delivered.
- Ongoing reviews of existing care packages
- Continue the roll out of the new workforce retention strategy which will strengthen the focus on delivery of care package savings.
- Robustly applying the strength-based ethos regarding commissioning care packages.
- Fortnightly triangulation meetings with Finance, Commissioners and Social work management teams to continuous challenge and review the system (Controcc) data quality used to derive the Care in the Community outturn forecast.
- Weekly Saving Challenge meetings
- Monthly Adult Social Care Finance Board Meeting
- Monthly Senior Leadership (SLT) Team Meeting

Operations - £1.803m overspend

Operations	Current Budget	Projected Outturn	Quarter 3 variance	Quarter 2 variance	Movement from Quarter 2
	£m	£m	£m	£m	
Arts & Museums	0.598	0.591	(0.007)	(0.017)	0.011
Commercial Services	(0.427)	(0.001)	0.426	0.411	0.015
Engineers	(0.693)	(0.661)	0.031	0.072	(0.041)
Facilities Management	2.256	2.485	0.229	0.110	0.119
Health & Environmental Protection	1.270	1.145	(0.125)	(0.108)	(0.016)
Operations Senior Management	0.566	0.563	(0.003)	(0.003)	0.000
Street Scene Maintenance	4.338	4.760	0.422	0.249	0.173
Waste, Transport & Stores	5.332	5.636	0.304	0.332	(0.028)
Wellness	2.163	2.690	0.527	0.596	(0.070)
Grand Total	15.403	17.206	1.803	1.641	0.162

Operations - Financial Headlines

Overall, the quarter 3 forecast position for the Department of Operations is a £1.803m overspend, an increase from quarter 2 of £0.162m. Included within the budget is a saving target of £1.790m 12.78% of the budget of which £0.692m remains to be achieved however this is mitigated in year by the over-achievement against the vacancy factor saving for the department £0.167m.

Wellness Operations, £0.527m overspend.

There is a forecast overspend in leisure centres and libraries due to increased costs of energy in 2023/24 of £0.461m, costs relating automated access in the leisure centres of £0.064m, rates and cleaning costs of £0.108m, this has been partially offset by underspends in Sports Development of £0.085m and over-achievement of income in bereavement of £0.041m.

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

Street Scene, - £0.422m overspend

There is a forecast overspend of £0.422m due to increased energy costs of £0.260m increasing the costs of street lighting and £0.268m underachieved savings on the implementation of LED lanterns due to capacity issues.

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

Commercial Services, £0.426m overspend

The Markets across Bury are forecasting to overspend by £0.269m due to an underachievement of income of £0.166m, the MTFS has a rebasing of the income target for future years. 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 £0.048m remains overspent after partial mitigation through the use of the catering reserve.

The Civic Halls budget is overspending by £0.113m and relates to staffing costs which are being incurred whilst civics are being mothballed. This budget has been realigned in the MTFS for 2024/25.

Waste, Transport and Stores, £0.304m 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 £0.070m, partially offset by mitigating underspends.

Health & Environment Protection, - (£0.125m) underspend.

The forecast underspend is due to the spend moratorium and an overachievement of the vacancy factor of £0.039m

Facilities Management, - £0.228m overspend

The overspend relates to underachievement of income from admin buildings income of £0.126m, energy £0.074m, cleaning costs £0.076m offset by underspends on moratorium codes and salaries £0.069m.

Savings 2023/24

The Council has a challenging savings target of £23.971m to deliver this financial year and to date has successfully delivered £17.947m at the end of quarter three with total savings of £22.268m forecast for the full year. The successful delivery of 93% of the savings target in the context of rising demand and other national and regional pressures reflected locally represents a considerable achievement for the Council.

The in-year savings referred to above include permanently embedded savings and some smaller one-off savings which in addition to the £1.644m equate to a total of £3.408m needing to be delivered on a permanent basis during 2024/25. However, £2.908m of these savings will still be achieved from existing planned projects but for reasons given below have necessitated reprofiling over future financial years.

When savings achieved and forecasted in 23/24 are aggregated with the reprofiled savings the shortfall in the total savings targets set for 23/24 is £0.500m, a gap of 2%.

The reprofiled targets and associated projects are as follows:

- £0.192m for LED lighting will be achieved in the Operations budget in 24/25. The delay has been caused by the lack of availability of external contractors to undertake the necessary work.
- The HAC directorate is reporting a £0.332m net saving shortfall at quarter 3 which is being driven in two areas:
- Working Age Adults savings initiatives are subject to appropriate accommodation being available and legal process being completed, consequently, where there is delay in transitioning to suitable accommodation there is a delay in the saving being achieved which is now expected to be in 24/25.
- Housing Complex Care saving delivery is being negatively impacted due to property completion dates slipping and is expected to be delivered in 24/25.
- £0.400m of children placements savings which, due to the in-year increase in demand will now be delivered in 26/27. Alternative plans are in place to deliver the savings in 24/25 through additional contribution to high-cost placements from Health and a reduction in transport costs.
- The saving target of £0.845m associated with the rationalisation of council buildings to reduce maintenance costs and generate capital receipts will be achieved as rental income from Health partners located in Pennie £0.125m in 24/25 and £0.375m in 25/26 with the remaining £0.345m being delivered from further rationalisation and

small asset disposals in 24/25 (£0.095m) and 25/26 (£0.250m). There is potential to increase the value of these savings when work on the Forward Asset Plan business case is completed.

- Savings of £0.664m associated with planned moves towards further digitalisation have proved difficult to implement and plans and implementation methodology are now being reviewed with a further report being prepared. Full year implementation is not expected until the end of 24/25 and the savings have therefore been re-profiled to be achieved in 25/26.
- The Home Support Service and HRA target of £0.425m has a plan in place for £0.150m to be achieved in 2024/2025 and a review of the HRA is expected to deliver efficiencies of the remaining £0.275m due to the insourcing of the service, this also been reprofiled to 24/25.
- Savings of £0.050m associated with a reduction in external fees and charges are proving difficult to achieve in the context of additional work needing to be undertaken but Directors continue to reevaluate commissioning and requirements, and the savings have been reprofiled to 24/25.

The remaining shortfall in savings of £0.500m are within the Operation Directorate including Highways (£0.076m), Transport (£0.070m), Commercial Services (£0.232m) and Waste recycling (£0.122m). The original planned targets have proved difficult to secure due to a variety of internal and external factors including demand. However, the Directorates management team are committed to the savings targets and are currently developing alternative mitigations, to be delivered in 24/25, subject to Cabinet approval.

When approved all the above savings' projects will be supported by more a formalised project and delivery plan process to be monitored monthly and scrutinised by the Executive Delivery Board on a regular basis.

Council wide Savings Tracker 2022/23 and 2023/24

Savings Group	Directorate Savings Programme	Project Lead	Savings target	Savings achieved to date	Forecast	Variance
Budget Savings 2023/24	All		£2,712,000	£2,068,964	£2,800,100	£88,100
	Business Growth & Investment	Paul Lakin	£750,000	£250,000	£750,000	£0
	Children & Young People	Jeanette Richards	£707,000	£507,000	£507,000	£-200,000
	Corporate Core	Kate Waterhouse	£591,000	£406,050	£591,000	£0
	Corporate Core Finance	Sam Evans	£150,000	£150,000	£150,000	£0

	Housing General Fund	Liz Cooke	£964,000	£0	£539,000	£-425,000
	Department of Operations	Donna Ball	£1,296,000	£585,041	£926,000	£-370,000
	Non service Specific	Paul McKevitt	£1,638,000	£1,638,000	£1,638,000	£0
	Department of Health & Adult Care	Will Blandamer	£5,800,000	£3,711,810	£4,839,272	£-960,728
Subtotal Cabinet 2023 agreed savings			£14,608,000	£9,316,865	£12,740,372	£-1,867,627
Budget Savings 2022/23 agreed 2023/24	Business Growth & Investment	Paul Lakin	£500,000	£500,000	£500,000	£0
	Department of Operations	Donna Ball	£200,000	£74,828	£78,000	£-122,000
	Department of Health & Adult Care	Will Blandamer	£1,961,000	£2,253,678	£2,589,332	£628,332
Subtotal Cabinet 2022 agreed savings			£2,661,000	£2,828,505	£3,167,332	£506,332
Once	Digitilisation & Channel Shift	Karen Johnston	£900,000	£900,000	£900,000	£0
Once	Digitilisation & Channel Shift	Karen Johnston	£-100,000	£-100,000	£-100,000	£0
Flexibly	Building Revenue Reductions	Paul Lakin	£500,000	£500,000	£500,000	£0
Subtotal Transformation 2023 agreed savings			£1,300,000	£1,300,000	£1,300,000	£0
2023/24 Savings Target			£18,569,000	£13,445,370	£17,207,704	£-1,361,296

Savings Group	Directorate Savings Programme	Project Lead	Savings target	Savings achieved to date	Forecast	Variance
2022/23 unachieved savings	Children & Young People		£320,000	£120,000	£120,000	£-200,000
	Department of Health & Adult Care		£1,546,161	£1,255,673	£1,603,275	£57,114
	Department of Operations		£294,000	£0	£94,000	£-200,000
	Transformation savings		£1,621,127	£1,563,127	£1,621,627	£500
	Of Transformation total - Once		£691,000	£641,000	£691,000	£0
	Of Transformation total - Well		£538,127	£530,127	£538,627	£500

	Of Transformation total - Flexibly		£392,000	£392,000	£392,000	£0
Subtotal 2022/23 unachieved savings			£5,402,415	£4,501,927	£5,060,529	-£341,886
Savings Target (2022/23 and 2023/24)			£23,971,415	£17,947,298	£22,268,233	-£1,703,182

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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 approved, to increase the overall 2023/24 Capital Programme to £144.588m.

At the 7 November 2023 Cabinet meeting, scheme updates of £67.035 were approved to reduce the overall 2023/24 Capital Programme, from £144.588m to £77.553m.

For quarter 3, project managers have continued to review their respective capital schemes and are proposing updates and re-phasing into future years of £7.472m, to match the anticipated timing of spend, as a result of more up to date information becoming available, that reduce the overall 2023/24 Capital Programme from £77.553m to £70.081m.

	2023/24	In-Year Performance				Q3 to Q2 Movement		2024/25	2025/26
	Revised Programme	Actual Spend at Q3	Actual Spend at Q3	Forecast Spend Q3	Forecast (Under) / Over Spend	Forecast Spend Q2	Movement Q3 to Q2	Revised Programme	Revised Programme
	£m	£m	%	£m	£m	£m	£m	£m	£m
Capital Expenditure by Theme									
Regeneration and Economic Growth	£11.565	£3.806	33%	£11.117	(£0.448)	£12.446	(£1.329)	£51.786	£39.012
Place Shaping/Growth	£1.326	£0.815	61%	£0.848	(£0.477)	£2.005	(£1.156)	£1.986	£0.000
Sports and Leisure	£3.931	£2.014	51%	£3.948	£0.016	£3.866	£0.082	£5.709	£2.000
Operational Fleet	£3.935	£2.490	63%	£3.735	(£0.200)	£3.735	£0.000	£0.000	£0.000
ICT and Digital	£0.780	£0.956	123%	£1.944	£1.164	£2.206	(£0.262)	£0.000	£0.000
Highways	£17.271	£9.873	57%	£15.117	(£2.154)	£19.722	(£4.605)	£13.699	£6.330
Children and Young People	£9.082	£2.088	23%	£9.064	(£0.018)	£9.509	(£0.445)	£19.426	£0.000
Estate Management - Investment Estate	£0.070	£0.000	0%	£0.070	£0.000	£0.070	£0.000	£0.081	£0.000
Estate Management - Corporate Landlord	£2.642	£1.603	61%	£2.594	(£0.048)	£2.890	(£0.296)	£1.888	£0.850
Older People and Disabled Facilities Grant	£1.676	£1.002	60%	£1.595	(£0.081)	£1.500	£0.095	£1.650	£0.000
Housing GF	£0.438	£0.242	55%	£0.436	(£0.002)	£0.654	(£0.218)	£2.484	£0.000
Housing HRA	£17.118	£7.119	42%	£17.118	(£0.000)	£18.255	(£1.138)	£18.082	£14.605
Climate Change	£0.247	£0.028	12%	£0.247	£0.000	£0.277	(£0.030)	£0.172	£0.000
TOTAL EXPENDITURE	£70.081	£32.038	46%	£67.834	(£2.247)	£77.135	(£9.301)	£116.963	£62.797
Financing the Capital Programme									
Prudential Borrowing	£17.623			£18.156	£0.533	£19.310	(£1.153)	£43.709	£42.919
External Funding	£33.008			£30.840	(£2.168)	£36.380	(£5.540)	£50.536	£3.446
Capital Receipts	£6.651			£6.526	(£0.125)	£2.105	£4.421	£3.853	£3.786

General Fund RCCO	£1.399		£0.912	(£0.487)	£1.085	(£0.173)	£0.783	£0.000
Housing Revenue Account DRF/MRR	£11.400		£11.400	£0.000	£18.255	(£6.856)	£18.082	£12.646
TOTAL FINANCING	£70.081		£67.834	(£2.247)	£77.135	(£9.301)	£116.963	£62.797

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 to 2023/24: £1.024m

Mainly relates to grant funded schemes of:

- £521k, HRA Social Housing Quality Fund.
- £200k, Highway Schemes.
- £62k, other grant funded schemes.

Schemes funded by borrowing of:

- £200k, Operational Fleet.
- £41k, other schemes funded by borrowing.

Reductions to 2023/24: (£2.267m)

Mainly relates to:

- £2.196m HRA capital programme re-alignment to the HRA Business Plan, funded from a mixture of grants, receipts, direct revenue financing and major repairs reserve.

Re-phasing to 2024/25: (£6.229m)

Notable schemes include:

- £3.415m, Highway Schemes funded from a mixture of grant and borrowing.
- £1.165m, Bury Flexi Hall funded through a mixture of LUF grant and borrowing.
- £700k, Place Shaping Growth Schemes funded by capital receipts and borrowing.
- £471k, Schools Condition and Devolved Formula Grants.

Additions to 2024/25: £6.174m

- £2.339m, GM Mayor's Challenge Fund for the Milltown Street Footbridge scheme.
- £3.835m, HRA capital programme re-alignment to the HRA Business Plan, funded from a mixture of direct revenue financing and major repairs reserve.

Re-phasing to 2025/26: (£22.939m)

Bury Flexi Hall funded through a mixture of LUF grant and borrowing.

Additions to 2025/26: £0.605m

- £605k, HRA capital programme re-alignment to the HRA Business Plan, funded from a mixture of receipts, direct revenue financing and major repairs reserve.

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	Approved In-Year Programme Updates	Proposed In-Year Programme Updates	Revised Programme	Actual Spend at Q3	Forecast Spend Q3	Forecast (Under) / Over Spend	Approved Programme FEB23	Approved In-Year Programme Updates	Proposed In-Year Programme Updates	Revised Programme	Approved Programme FEB23	Approved In-Year Programme Updates	Proposed In-Year Programme Updates	Revised Programme
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Capital Programme															
Regeneration and Economic Growth															
Radcliffe Hub	£27.380	(£19.258)	£0.072	£8.194	£1.801	£8.147	(£0.047)	£8.518	£21.122	(£0.072)	£29.568	£0.000	£0.000	£0.000	£0.000
Radcliffe Hub - FF&E	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£1.125	£0.000	£0.000	£1.125	£0.000	£0.000	£0.000	£0.000
Radcliffe Enterprise Centre Design Development	£0.121	(£0.012)	£0.000	£0.109	£0.078	£0.000	(£0.109)	£0.246	£0.012	£0.000	£0.258	£0.000	£0.000	£0.000	£0.000
Radcliffe Enterprise Centre	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£4.700	£0.000	£0.000	£4.700	£0.000	£0.000	£0.000	£0.000
CRSTS: Radcliffe SOBC	£1.380	(£1.380)	£0.000	(£0.000)	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Prestwich	£8.362	(£7.344)	£0.000	£1.018	£0.239	£1.047	£0.029	£11.092	(£7.786)	£0.000	£3.306	£0.000	£16.073	£0.000	£16.073
Ramsbottom	£0.272	(£0.185)	£0.000	£0.086	£0.000	£0.000	(£0.086)	£0.000	£0.200	£0.000	£0.200	£0.000	£0.000	£0.000	£0.000
Bury Flexi Hall	£25.511	(£22.403)	(£1.165)	£1.943	£1.678	£1.923	(£0.020)	£12.072	£22.333	(£21.774)	£12.630	£0.000	£0.000	£22.939	£22.939
Commercial Sites Regeneration	£0.500	(£0.286)	£0.000	£0.214	£0.011	£0.000	(£0.214)	£0.500	(£0.500)	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Regeneration and Economic Growth Total	£63.526	(£50.868)	(£1.093)	£11.565	£3.806	£11.117	(£0.448)	£38.252	£35.380	(£21.846)	£51.786	£0.000	£16.073	£22.939	£39.012
Place Shaping/Growth Total	£2.091	(£0.066)	(£0.699)	£1.326	£0.815	£0.848	(£0.477)	£0.350	£0.936	£0.700	£1.986	£0.000	£0.000	£0.000	£0.000
Sports and Leisure Total	£4.817	(£0.880)	(£0.005)	£3.931	£2.014	£3.948	£0.016	£1.260	£2.105	£2.344	£5.709	£0.300	£1.700	£0.000	£2.000
Operational Fleet Total	£3.469	£0.266	£0.200	£3.935	£2.490	£3.735	(£0.200)	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
ICT and Digital Total	£0.858	(£0.078)	£0.000	£0.780	£0.956	£1.944	£1.164	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Highways															
Cycle and Walking Routes	£2.011	£1.025	(£2.443)	£0.594	£0.342	£0.572	(£0.022)	£0.000	£0.000	£2.443	£2.443	£0.000	£0.000	£0.000	£0.000
Highways	£3.964	£8.447	£0.599	£13.010	£7.461	£12.149	(£0.861)	£3.483	£1.093	£0.642	£5.218	£2.884	£0.000	£0.000	£2.884
Street Lighting	£1.730	(£0.025)	(£0.330)	£1.375	£1.357	£1.850	£0.475	£1.730	£0.000	£0.330	£2.060	£0.000	£0.000	£0.000	£0.000
Traffic Calming and Improvement	£0.538	(£0.508)	£0.000	£0.030	£0.000	£0.000	(£0.030)	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
City Region Sustainable Transport Core Maintenance	£3.273	(£0.516)	(£1.041)	£1.716	£0.000	£0.000	(£1.716)	£2.546	£0.000	£0.000	£2.546	£2.546	£0.000	£0.000	£2.546
City Region Sustainable Transport Strategic Maintenance	£0.900	(£0.900)	£0.000	(£0.000)	£0.000	£0.000	£0.000	£0.900	£0.532	£0.000	£1.432	£0.900	£0.000	£0.000	£0.900
Road Safety	£0.300	£0.246	£0.000	£0.546	£0.714	£0.546	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000

	2023/24				In-Year Performance			2024/25				2025/26			
	Approved Programme FEB23	Approved In-Year Programme Updates	Proposed In-Year Programme Updates	Revised Programme	Actual Spend at Q3	Forecast Spend Q3	Forecast (Under) / Over Spend	Approved Programme FEB23	Approved In-Year Programme Updates	Proposed In-Year Programme Updates	Revised Programme	Approved Programme FEB23	Approved In-Year Programme Updates	Proposed In-Year Programme Updates	Revised Programme
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Highways Total	£12.716	£7.770	(£3.215)	£17.271	£9.873	£15.117	(£2.154)	£8.659	£1.625	£3.415	£13.699	£6.330	£0.000	£0.000	£6.330
Children and Young People															
Children and Young People All Schools	£14.028	(£4.517)	(£0.429)	£9.082	£2.088	£9.064	(£0.018)	£0.000	£18.955	£0.471	£19.426	£0.000	£0.000	£0.000	£0.000
Children and Young People - New Special School	£2.000	(£2.000)	£0.000	(£0.000)	£0.000	£0.000	£0.000	£8.500	(£8.500)	£0.000	£0.000	£8.000	(£8.000)	£0.000	£0.000
Children and Young People - Star Academy	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Children and Young People Total	£16.028	(£6.517)	(£0.429)	£9.082	£2.088	£9.064	(£0.018)	£8.500	£10.455	£0.471	£19.426	£8.000	(£8.000)	£0.000	£0.000
Estate Management - Investment Estate Total	£0.086	(£0.010)	(£0.005)	£0.070	£0.000	£0.070	£0.000	£0.000	£0.081	£0.000	£0.081	£0.000	£0.000	£0.000	£0.000
Estate Management - Corporate Landlord															
Fernhill Gypsy and Traveller Site	£1.566	(£0.196)	£0.000	£1.370	£1.423	£1.418	£0.047	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000	£0.000
Springwater Park	£1.850	(£1.250)	£0.000	£0.600	£0.023	£0.600	£0.000	£0.750	£0.000	£0.000	£0.750	£0.000	£0.850	£0.000	£0.850
Muslim Burial Extension	£0.025	(£0.021)	£0.000	£0.003	£0.000	£0.003	£0.000	£0.000	£0.029	£0.000	£0.029	£0.000	£0.000	£0.000	£0.000
Welfare Facilities and Emergency Building Repairs	£1.324	(£0.335)	(£0.321)	£0.668	£0.157	£0.573	(£0.095)	£1.482	(£0.669)	£0.296	£1.109	£0.000	£0.000	£0.000	£0.000
Estate Management - Corporate Landlord Total	£4.765	(£1.803)	(£0.321)	£2.642	£1.603	£2.594	(£0.048)	£2.232	(£0.641)	£0.296	£1.888	£0.000	£0.850	£0.000	£0.850
Older People and Disabled Facilities Grant															
Older People	£0.223	(£0.128)	£0.000	£0.095	£0.007	£0.095	£0.000	£0.000	£0.128	£0.000	£0.128	£0.000	£0.000	£0.000	£0.000
Disabled Facilities Grant	£0.487	£1.094	£0.000	£1.581	£0.995	£1.500	(£0.081)	£0.000	£1.522	£0.000	£1.522	£0.000	£0.000	£0.000	£0.000
Older People and Disabled Facilities Grant Total	£0.710	£0.966	£0.000	£1.676	£1.002	£1.595	(£0.081)	£0.000	£1.650	£0.000	£1.650	£0.000	£0.000	£0.000	£0.000
Housing GF															
Empty Property Strategy	£0.368	£0.000	(£0.218)	£0.150	£0.033	£0.150	£0.000	£0.000	£0.000	£0.218	£0.218	£0.000	£0.000	£0.000	£0.000
Housing Development	£0.811	(£0.544)	£0.020	£0.288	£0.209	£0.286	(£0.002)	£0.000	£2.267	£0.000	£2.267	£0.000	£0.000	£0.000	£0.000
Housing GF Total	£1.179	(£0.544)	(£0.198)	£0.438	£0.242	£0.436	(£0.002)	£0.000	£2.267	£0.218	£2.484	£0.000	£0.000	£0.000	£0.000
Housing HRA															
Housing Public Sector	£15.982	£2.012	(£1.675)	£16.318	£6.769	£16.322	£0.003	£13.447	£0.000	£3.835	£17.282	£13.200	£0.000	£0.605	£13.805
Disabled Facilities Adaptations	£0.800	£0.000	£0.000	£0.800	£0.350	£0.796	(£0.004)	£0.800	£0.000	£0.000	£0.800	£0.800	£0.000	£0.000	£0.800

	2023/24				In-Year Performance			2024/25				2025/26			
	Approved Programme FEB23	Approved In-Year Programme Updates	Proposed In-Year Programme Updates	Revised Programme	Actual Spend at Q3	Forecast Spend Q3	Forecast (Under) / Over Spend	Approved Programme FEB23	Approved In-Year Programme Updates	Proposed In-Year Programme Updates	Revised Programme	Approved Programme FEB23	Approved In-Year Programme Updates	Proposed In-Year Programme Updates	Revised Programme
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Housing HRA Total	£16.782	£2.012	(£1.675)	£17.118	£7.119	£17.118	(£0.000)	£14.247	£0.000	£3.835	£18.082	£14.000	£0.000	£0.605	£14.605
Climate Change Total	£0.171	£0.106	(£0.030)	£0.247	£0.028	£0.247	£0.000	£0.000	£0.142	£0.030	£0.172	£0.000	£0.000	£0.000	£0.000
TOTAL EXPENDITURE	£127.198	(£49.645)	(£7.471)	£70.081	£32.038	£67.834	(£2.247)	£73.500	£54.000	(£10.537)	£116.963	£28.630	£10.623	£23.544	£62.797
Financing the Capital Programme															
Prudential Borrowing	£54.274	(£35.916)	(£0.734)	£17.623		£18.156	£0.533	£55.330	£10.408	(£22.029)	£43.709	£11.057	£8.923	£22.939	£42.919
External Funding	£50.165	(£11.859)	(£5.298)	£33.008		£30.840	(£2.168)	£3.446	£40.251	£6.840	£50.536	£3.446	£0.000	£0.000	£3.446
Capital Receipts	£5.575	(£3.867)	£4.943	£6.651		£6.526	(£0.125)	£0.477	£2.776	£0.600	£3.853	£0.127	£1.700	£1.959	£3.786
General Fund RCCO	£1.632	(£0.015)	(£0.218)	£1.399		£0.912	(£0.487)	£0.000	£0.566	£0.218	£0.783	£0.000	£0.000	£0.000	£0.000
Housing Revenue Account DRF/MRR	£15.552	£2.012	(£6.164)	£11.400		£11.400	£0.000	£14.247	£0.000	£3.835	£18.082	£14.000	£0.000	(£1.354)	£12.646
TOTAL FINANCING	£127.198	(£49.645)	(£7.471)	£70.081		£67.834	(£2.247)	£73.500	£54.000	(£10.537)	£116.963	£28.630	£10.623	£23.544	£62.797

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Quarter 3 2023/24 Prudential Indicators

The Authority measures and manages its capital expenditure and borrowing with references to the indicators set out within this report. CIPFA Prudential Code (2021) sets out the requirement for the prudential indicators to be reported on a quarterly basis.

Capital Expenditure:

The Authority has undertaken and is planning capital expenditure as summarised below.

Table 1: Capital Expenditure Forecast

Capital Programme	2022/23 Actual £m	2023/24 Estimate £m	2024/25 Forecast £m	2025/26 Forecast £m
General Fund services	£35.095	£50.716	£98.881	£48.192
Council housing (HRA)	£13.296	£17.118	£18.082	£14.605
Policy/Non-Financial Investments	£20.099	£0.000	£0.000	£0.000
Total Capital Expenditure	£68.490	£67.834	£116.963	£62.797
Resourced by:				
External Funding	£17.760	£30.840	£50.536	£3.446
Capital Receipts	£0.254	£6.526	£3.853	£3.786
General Fund RCCO	£0.706	£0.912	£0.783	£0.000
Housing Revenue Account DRF/MRR	£12.257	£11.400	£18.082	£12.646
Total Resources	£30.977	£49.678	£73.254	£19.878
Financing Requirement	£37.513	£18.156	£43.709	£42.919

The main General Fund capital projects to date include: Highways schemes of £15.117m, Regeneration projects of £11.117m, Schools of £9.064m, Sports and Leisure schemes to a total of £3.948m, Operational Fleet of £3.735m.

HRA capital expenditure of £17.118m is recorded separately.

Capital Financing Requirement:

The Authority's cumulative outstanding amount of debt finance is measured by the capital financing requirement (CFR). This increases with new debt-financed capital

expenditure and reduces with MRP / capital loans repayments and capital receipts used to replace debt.

Table 2: CFR – Capital Financing Requirement

Capital Financing Requirement (CFR)	2022-23 Actual £m	2023-24 Estimate £m	2024-25 Forecast £m	2025-26 Forecast £m
CFR - GF	£186.619	£202.371	£243.307	£282.975
CFR - HRA	£119.216	£119.216	£119.216	£119.216
CFR - Policy/Non-Financial Investments	£65.285	£65.159	£63.299	£62.800
CFR Balance	£371.120	£386.746	£425.822	£464.991
Movement in CFR	£35.715	£15.626	£39.076	£39.169
Movement in CFR				
Financing Requirement	£37.513	£18.156	£43.709	£42.919
Minimum Revenue Provision (MRP) / Loans Fund Repayments	(£1.798)	(£2.530)	(£4.633)	(£3.750)
Voluntary Revenue Provision (VRP)	£0.000	£0.000	£0.000	£0.000
Movement in CFR	£35.715	£15.626	£39.076	£39.169

Gross Debt and the Capital Financing Requirement:

Statutory guidance is that debt should remain below the capital financing requirement, except in the short term. The Authority has complied and expects to continue to comply with this requirement in the medium term as is shown below.

Table 3: Gross Debt and the CFR – Capital Financing Requirement

Actual External Debt against Capital Borrowing Need	2022-23 Actual £m	2023-24 Estimate £m	2024-25 Forecast £m	2025-26 Forecast £m
<u>External Debt:</u>				
Debt at 1 April	£220.826	£243.629	£282.855	£326.564
Expected Change in Debt +/-	£22.803	£39.226	£43.709	£42.919
Actual Gross Debt at 31 March	£243.629	£282.855	£326.564	£369.483
Capital Financing Requirement (CFR)	£371.120	£386.746	£425.822	£464.991
Under/(Over) Borrowing	£127.491	£103.891	£99.258	£95.508

Debt and the Authorised Limit and Operational Boundary:

The Authority is legally obliged to set an affordable borrowing limit (also termed the Authorised Limit for external debt) each year and to keep it under review. In line with statutory guidance, a lower “operational boundary” is also set as a warning level should debt approach the limit.

Table 4: The Operational Boundary

Operational Boundary	2022-23 Actual £m	2023-24 Estimate £m	2024-25 Forecast £m	2025-26 Forecast £m
Borrowing	£371.120	£386.746	£425.822	£464.991
Other Long-term Liabilities	£0.010	£0.010	£0.010	£0.010
Total	£371.130	£386.756	£425.832	£465.001

Table 5: Authorised Limits

Authorised Limit	2022-23 Actual £m	2023-24 Estimate £m	2024-25 Forecast £m	2025-26 Forecast £m
Borrowing	£381.120	£396.746	£435.822	£475.991
Other Long-term Liabilities	£0.010	£0.010	£0.010	£0.010
Total	£381.130	£396.756	£435.832	£476.001

Since the operational boundary is a management tool for in-year monitoring it is not significant if the boundary is breached on occasions due to variations in cash flow, and this is not counted as a compliance failure.



Classification: Open	Decision Type: Key
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Report to:	Cabinet	Date: 13 March 2024
Subject:	Proposed Redevelopment of The Elms for the Delivery of Accommodation for Older People	
Report of	Cabinet Member for Housing Services	

1.0 Summary

- 1.1 This report seeks approval to dispose of The Elms in Whitefield for the delivery of an independent living scheme for the over 55's subject to procurement, to facilitate delivery of the Housing Strategy and generate savings to adult social care budgets.
- 1.2 The Elms is a long-term disused council owned brownfield site, located within a well-established residential area in the Unsworth Ward, Whitefield. The site was occupied by a 2.5 storey Victorian building comprising 5 flats, which had fallen into significant disrepair and had been empty for five years.
- 1.3 A condition survey was undertaken in October 2021 by Arcus Consultants who confirmed that reinstatement/refurbishment costs were unviable, and demolition was the best option.
- 1.4 Cabinet approval for the demolition of the building was obtained in June 2022. Demolition was delayed due to the need for two independent bat surveys which can only be carried out at certain times of the year. The building was finally demolished in December 2023. Works costs were funded through the Housing Revenue Account (HRA).
- 1.5 In May 2023 Continuum Consultants were commissioned to undertake a feasibility study and options appraisal to determine the future of the cleared site.
- 1.6 The feasibility study considered a range of options for the site, initially 9 in number, applying a detailed analysis, viability assessment and soft market testing exercise against each one. This study concluded in January 2024 and Continuum recommended that the delivery of an independent living scheme for the over 55's would be the best use of this site. A scheme of this nature would enable older people to live independently for as long as possible thus generating cost savings to adult social care budgets.

2.0 Recommendation(s)

That Cabinet:

2.1 Approve the proposals for the disposal and redevelopment of The Elms as set out within this report, to expedite delivery of the priorities within the Housing Strategy.

2.2 Request a report back to Cabinet on the offers received with a recommendation as to the preferred bidder.2.3

3.0 Reason for recommendation(s)

3.1 Facilitate the Councils 'brownfield first' approach to housing delivery and reduce revenue costs for holding, maintaining and securing long-term disused sites.

3.2 Delivery of much needed, affordable homes for older people to reduce the need for more costly interventions and relieve pressures on housing waiting lists.

3.3 Considerable benefits in health and community care with substantial savings on out of borough placements and the Council's adult social care budgets.

3.4 Create wider social, environmental, and financial benefits including additional council tax revenue and the potential to generate a capital receipt.

4.0 Alternative option(s) considered and rejected

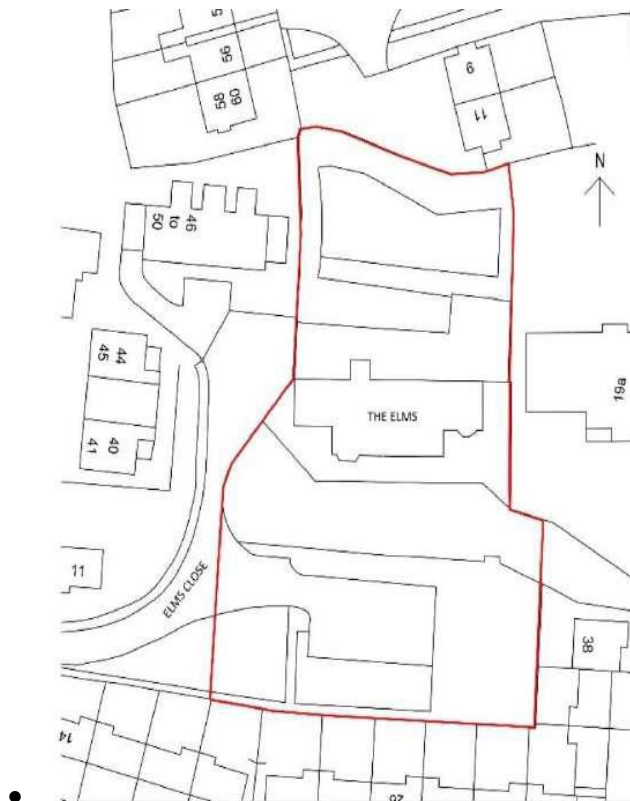
4.1 Do nothing: Bury has high levels of need for affordable housing for older people and supply is required in the marketplace immediately. This is a brownfield site in an area of high demand which is suitable for affordable housing for this cohort, to do nothing would not be an option.

4.2 A range of alternative housing options were considered as part of the feasibility study undertaken (refer to item1.6) – a number were discounted based on the assessment criteria utilised to arrive at the preferred option.

5.0 Background

5.1 The Elms is located off Elms Close on the Elms estate in Whitefield. The site is circa. 0.3 ha and consists of a landscaped area and a shared car park which includes spaces for the adjacent retirement bungalows. The site also includes land to the rear of the former property which is currently fenced off and comprises several mature trees.

5.2 The site is in a predominantly residential area, with sheltered housing to the south and west. These are in the form of bungalows and two storey apartments. The properties to the north are a mix of bungalows and two storey terraced social housing and there is a large bungalow to the east. Immediately adjacent to and opposite the site are traditional terraced housing. A range of local services including a post office, takeaway, doctor's surgery and hairdressers are within walking distance of the site. The site falls within Flood Zone 1, an area of low probability flooding.



- 5.2 Based on recent assessments, the site has capacity for circa 24 apartments / flats or, between 5 to 10 houses depending on the design and mix of accommodation.

6.0 Proposed development

- 6.1 The Council's integrated commissioners for adult social care consider this site to be suitable for a housing development for older people, to help meet the needs of this cohort.
- 6.2 The new development would offer up to 24 apartments for social/affordable rent (the Council's preference is for social rent where possible). Grant subsidy from Homes England would be required to support development costs should a registered provider be selected to develop this scheme.
- 6.3 The incoming developer will be encouraged to build the new properties to a high-quality specification incorporating low carbon technologies where possible to reduce fuel bills, support natural sustainable drainage and inspire wildlife, offering significant benefits to residents, the Council and the environment.
- 6.5 This development would help set a standard for which future homes can be built, balancing cost benefits and lifestyles for residents. It would be developed in conjunction with the Councils integrated commissioners for adult social care.
- 6.6 All properties would be owned and managed by a registered provider but, the Council would retain 100% nomination rights to all homes in perpetuity.

Generally, the Council would only be entitled to 100% nomination rights on all first lets and 50% thereafter.

7.0 Housing need and intelligence

- 7.1 There is an increasing shortage of specialist housing for older people in Bury and the number of older people is set to increase significantly by 2030. Approximately one quarter of all households currently living in the borough are older person households.
- 7.3 A Housing Market Position Statement undertaken in 2021 suggests that Bury needs an additional 114 units of accommodation for older people between now and 2025.
- 7.4 A key focus of the Housing Strategy is to address the shortfall in housing provision for older people, to drive better quality outcomes for individuals and enable more people to live independently in the borough for as long as possible. The proposed re-development of the Elms seeks to deliver on this.

8.0 Next steps

- 8.1 Senior officers from Housing and the Council's integrated commissioners for adult social care will generate a procurement brief, setting out the Council's requirements and desired outcomes for the scheme. Strategic delivery partners and members of the Council's Registered Provider Partnership Framework will be invited to submit bids through The Chest.
- 8.3 Applications from providers will be assessed against a range of performance criteria and quantitative and qualitative assessments, including previous experience and expertise of developing and delivering similar projects. The successful provider will work with the Council to deliver the proposed scheme.
- 8.4 A project plan with risk register, key milestones and timelines will be established to monitor progress, enabling the Council to take control and accelerate delivery.

9.0 Links with the Corporate Priorities:

- 9.1 This proposal contributes towards meeting the Council's priorities across a range of policy areas including increasing the supply of affordable housing to meet the current and future housing needs of older people.
- 9.2 It sets out plans for the delivery of a housing development on brownfield land and an opportunity to create successful and inclusive neighbourhoods in conjunction with the ambitions of the Bury 2030 Let's do it Strategy.

10.0 Equality Impact and Considerations:

- 10.1 This proposal demonstrates a positive impact on people with protected characteristics. It recognises the specific housing needs of older people.
- 10.2 The redevelopment of this site will result in the regeneration of the area, which will help improve the local environment by reducing opportunity for anti-social behaviour including fly-tipping. The development will also provide much needed affordable homes for the borough's older generation.

11.0 Environmental Impact and Considerations:

- 11.1 The new scheme will be built to current building regulations standards and therefore deliver a high specification and design.
- 11.2 Nesting bricks will be encouraged to side elevations in shaded areas to provide nesting and wildlife opportunities.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The scheme doesn't get delivered.	This is unlikely as there is early interest in this site from strategic delivery partners and registered providers (that are entitled to grant subsidy from Homes England to support development costs).
The Council fails to achieve best value for the land in accordance with s123 of the Local Government Act 1972	Disposal of the land through the Chest to strategic delivery partners / Registered Provider Partnership Framework would ensure that best value is achieved.

12.0 Legal Implications:

- 12.1 A full site due diligence exercise is currently being undertaken with the Land & Property Team, the results of which will be fed into the tender exercise.
- 12.2 A public open space notice process will need to be undertaken prior to disposal. The notice pursuant to s123 (2A) of the Local Government Act 1972 will give members of the public the opportunity to comment on this disposal. The Council will consider any comments/objections received to the proposed disposal within 28 days of the publication of the notice.
- 12.3 Approval to dispose of this land has not previously been agreed for this purpose. The Council must ensure that it meets the obligations of the best value requirements of s123 of the Local Government Act 1972. A RCIS Red Book valuation has been undertaken to determine the open market value of the land. Detailed legal advice will be provided at all stages.

13.0 Financial Implications:

- 13.1 This scheme will enable the construction of affordable homes for older people. The new homes are expected to generate savings to adult social care budgets. There is also a saving from reduced revenue costs for maintaining and securing long-term disused sites.
 - 13.2 Disposal of land usually necessitates the expenditure of fees to support technical due diligence, marketing costs and legal fees. As this proposal will be a direct transaction, cost savings can be assumed apart from in-house legal fees.
 - 13.3 The development proposals when complete would generate additional council tax revenue and contribute towards housing growth targets.
 - 13.4 The Council would retain 100% nomination rights to all social rent/affordable rent properties in perpetuity. This means that these properties would constantly be available to applicants on the Council's housing waiting lists.
 - 13.5 The costs will be funded through the Housing Revenue Account.
-

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Background papers:

Cabinet Report 1st June 2022 Demolition of the Elms, Whitefield -

<https://councildecisions.bury.gov.uk/documents/s31626/Demolition%20of%20the%20Elms%20Whitefield.pdf>

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

Term	Meaning
The Chest	The Northwest e-portal for procurement where local authorities (and some other public bodies) advertise some of their tenders.
Registered provider	Also known as a housing association.



Classification: Open	Decision Type: Key
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Report to:	Cabinet	Date: 13 March 2024
Subject:	Procurement of Water Hygiene Monitoring Services for the Prevention of Legionella Award Recommendation – Part A	
Report of	Cabinet Member for Corporate Affairs and HR	

1. Summary

The purpose of this report is to seek formal approval of a contract award recommendation following completion of the further competition exercise carried out to procure the Council's water hygiene monitoring services contract via the ESPO 198_20 Framework. The contract is for the period 1st July 2024 to 30th June 2027 with an extension option at the discretion of the Council for a further 2 years.

This Water Hygiene Monitoring Contract is for the prevention of Legionella, this is to ensure compliance with the Health and Safety at Work etc Act 1974 (HSWA) and the Control of Substances Hazardous to Health Regulations 1999 (COSHH) concerning the risk from exposure to Legionella bacteria.

This contract provides prevention of Legionella compliance to all Council-controlled properties, schools that buy into the service and buildings occupied by Persona. There are 209 properties with the current contract, comprising 57 Schools, 11 Persona Buildings, 20 Properties previously managed by Six Town Housing and 121 Council-controlled buildings.

This contract is managed through Architectural Services and is a traded service which is recharged out to individual client departments, schools that buy into the service and ALMO's such as Persona.

2. Recommendation(s)

Cabinet is asked to:

- 2.1 Approve the award of a contract to the winning bidder for the period of three years from 1 July 2024 to 30 June 2027 with the right to extend at the discretion of the Council for a further 2 years.

3. Reasons for recommendation(s)

4. Only two compliant bids were received. The winning bidder scored highest overall in the evaluation process. The evaluation of the tenders was carried out on a 50:50 price and quality/social value basis.

5. Alternative options considered and rejected

5.1 Carry out the water hygiene monitoring service in house.

This option is currently not feasible as the council does not have the labour capacity, suitably trained staff or the necessary IT infrastructure to carry out a service such as this. In order for this option to work the Council would need to invest in additional resources both in staff, training, hardware and software requirements and was therefore determined as not a financially viable solution.

5.2 Carry out an open tender procurement exercise.

This option was considered and is possible, however this would involve significantly more time and costs in the procurement process as a whole and for no real benefit. The use of this framework is free and ensures that all suppliers have been evaluated and approved based on their capabilities, expertise, and compliance within required criteria along with pre-negotiated terms and conditions. Further competition exercise enabled the council to tailor the service requirements to the Council's specific needs. There are little or no benefits to going out to open tender over using this framework and as a result this option was dismissed.

6. Report Author and Contact Details:

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7. Background

The Approved Code of Practice (ACOP) L8 gives advice on the requirements of the Health and Safety at Work Act 1974 and the Control of Substances Hazardous to Health Regulations 2002 (COSHH) and applies to the risks from exposure to Legionella bacteria. It states that duty holders and those with responsibilities for the control of premises must identify and assess sources of risk in hot and cold water systems and where appropriate prepare a written scheme for preventing and controlling the risk.

Water Hygiene Monitoring forms part of the written scheme of control and is a scheduled regime of water system checks, monitoring and service requirements to ensure the water within the system is being stored appropriately, that necessary servicing of equipment is being carried out to reduce the risk of Legionella and other waterborne bacteria from proliferating.

In order to help manage the authorities' responsibilities and obligations with regards to water hygiene for the prevention of Legionella, Bury council has historically procured a competent and accredited water hygiene monitoring contractor to carry out all water hygiene risk assessments and ongoing water hygiene monitoring for all Bury Council controlled sites, schools (who opt into the council's service), Persona and Six Town Housing controlled properties.

The current contract was procured using a previous ESPO framework for Water Hygiene Monitoring Services and successfully provided the council with a competent water hygiene contractor to carry out the required water hygiene monitoring actions. This current contract was awarded in July 2019 as a 3-year contract with an option to extend for a further 2 years. Following a satisfactory appraisal of the contract after the first 3 years, a decision to extend was agreed and the current contract will now expire on the 30 of June 2024.

8. Links with the Corporate Priorities:

The Let's Do It Strategy sets out the Council's corporate priorities. This contract will support delivery in two key areas:

- 8.1 **Improved Quality of Life:** By its very nature this contract helps to ensure health and safety compliant water systems to protect all council-controlled building users and visitors, school staff and children, by preventing dangerous diseases such as Legionellosis.
- 8.2 **2025 Vision and Aims** - Connecting buildings & people to maximise performance and operational efficiency by transforming our building infrastructure into an integrated, rationalised, decarbonised health and safety compliant estate in support of Bury's 2030 'Lets-do-it' strategy. This contract works towards creating and maintaining a health and safety compliant estate by ensuring all buildings domestic hot and cold water systems are controlled appropriately to prevent conditions that promote the proliferation of harmful bacteria within water systems.

9. Equality Impact and Considerations:

The proposal does not bring about any changes that would impact on one protected characteristic over and above another, it does not result in increased/decrease access to services or provision for any particular group of the population or cause any disadvantage to a community of interest. The approach is to ensure value for money in procuring a water hygiene monitoring service for the council.

10.Environmental Impact and Considerations:

Contributes to ensuring a safe and compliant environment for all Council-controlled building users and visitors, school staff and children, by preventing dangerous diseases such as Legionellosis.

11.Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
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Water Hygiene Monitoring Contract expires without being renewed resulting in potential risk from water systems not properly monitored or maintained. Risk of proliferation of Legionella bacteria within water systems.	March 2024 cabinet approval will enable the council to award the new water hygiene monitoring contract in sufficient time for when the current contract expires.
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12. Legal Implications:

The procurement route employed and evaluation criteria adopted utilising the ESPO framework is compliant with both the Public Contract Regulations 2015 and the Council's Contract Procedure Rules.

13. Financial Implications:

Budget is available to fund the procurement of this contract.

14. Appendices:

None

15. Background papers:

None

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

Term	Meaning
ESPO	Eastern Shires Purchasing Organisation
ACOP	Approved Code of Practice
COSHH	Control of Substances Hazardous to Health
PBO	Public Buying Organisation
ALMO	Arms-Length Management Organisation



Classification: Open	Decision Type: Key
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Report to:	Cabinet	Date: 13 March 2024
Subject:	Adoption of Mill Gate 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 a draft Regeneration Framework, was developed. This work has been undertaken by the Mill Gate Joint venture and appropriate consultants.
- 1.3 The draft regeneration framework document was therefore 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.
- 1.4 Following cabinet sign off to consult on the draft regeneration framework, a period of public and stakeholder consultation has taken place. The results of which have been fully reviewed and amendments have been made in accordance with the results of the consultation where appropriate.
- 1.5 It is proposed that the regeneration framework at Appendix A is adopted to establish the long-term vision for the future development of the Mill Gate estate.

Recommendation(s)

It is recommended that cabinet:

- 2.1 Provide approval to adoption of the Mill Gate Regeneration Framework.

Reasons for recommendation(s)

- 2.1 The regeneration framework is a vital component of delivering the Bury Town Centre Masterplan.
- 2.2 The regeneration framework has been designed to support the Council's aims and objectives around inclusive economic growth in the Let's Do it! Strategy
- 2.3 The regeneration framework provides a clear long-term vision for redevelopment of the Mill Gate estate.

- 2.4 The regeneration framework will provide strategic guidance to enable coordinated delivery of development to maximise the environmental, economic, and social potential of Bury town centre.

Alternative options considered and rejected

- 3.1 Not applicable

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Department: BGI
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Background

- 4.1 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.
- 4.2 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.
- 4.3 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.
- 4.4 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.
- 4.5 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.

- 4.6 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.
- 4.7 Cabinet approved the JV to procure resources to deliver a draft 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.
- 4.8 Cabinet subsequently provided approval in November 2023 for the JV to carry out a formal period of public and stakeholder consultation on the draft regeneration framework produced. The project team then consulted with key stakeholders, organisations and the wider community. Consultees had several ways to be involved and have their say. These included a standalone website / consultation platform and in person events including two public consultation events on the 25th November 2023 and 6th January 2024.
- 4.9 The consultation concluded in line with the previous cabinet approval. All feedback received has been carefully considered and working collaboratively with the local community and other stakeholders has helped to shape the future plans for the Mill Gate and shape a number of amendments and additions to the framework now presented for adoption. From the feedback forms completed it is clear there is broad support for the vision outlined in the regeneration framework.
- 4.10 Changes made following consultation comments include;
- The updated regeneration framework fully recognises the importance of Bury's market offer and the requirement for the Mill Gate to celebrate and enhance the iconic and unique markets.
 - Accessibility was an important issue for a number of respondents and the regeneration framework states that proposals should ensure the public realm is accessible and inclusive addressing the needs of the diverse community.
 - A number of respondents suggested maintaining vehicle access to the town centre was a key issue (especially for those with reduced mobility). The Regeneration Framework recognises the key role the Mill Gate and Bury Town Centre will continue to act as a central hub for surrounding communities.

- Respondents welcomed improved green spaces and public realm however concerns were raised about maintenance of such spaces. The Regeneration Framework is clear that a long-term management strategy be put in place and that public realm within the joint venture ownership will be managed and maintained by the joint venture.
 - A number of comments regarding the importance of access to outdoor space for residents. The RF confirms that proposals should seek to ensure that future residents have access to sufficient provision of dedicated open space (private, communal and / or public).
- 4.11 Several comments were received that suggested that the masterplan doesn't go far enough and should include a wider area of the town centre. The Framework area is informed by the ownership of the joint venture but is mindful of the interfaces with the wider town centre and additional areas have been included to assist with future public realm improvements.

Links with the Corporate Priorities:

- 5.1 The vision for the Mill Gate is intrinsically linked to 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 reference to the Council's Housing Needs and Demand Assessment, community strategies and inclusive growth agenda. 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 development of the Mill Gate provides opportunities for providing new community infrastructure including adult learning, civic facilities and other health related services and deliver 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 has been a focus through the consultation of the regeneration work, and this will continue as phased development is brought through the planning process.

- **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 of the Mill Gate estate 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:

- 6.1 The regeneration framework has been produced to be mindful of the Council's equality commitments and responsibilities. An EqlA (Equality Impact Assessment) has been undertaken.
-

Environmental Impact and Considerations:

- 7.1 The regeneration framework makes specific reference to the policies in place to achieve sustainable development by delivering economic, social, and environmental benefits together. Sustainability is one of the key drivers for regeneration identified within the regeneration framework. Further information on Sustainability and Climate Change can be found from Page 25 of the regeneration framework.
- 1.2 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.
- 1.3 The provision of sustainable transport options will contribute to achieving these targets, by reducing emissions from personal vehicle usage and 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
- 1.4 Low-carbon development at Mill Gate also presents an opportunity to support Greater Manchester and Bury's net-zero carbon goals.
- 1.5 The Bury Bruntwood Joint Venture 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 sustainable.

- 1.6 Biodiversity - Within the objectives of the regeneration framework, the joint venture partners will look to deliver the required Biodiversity net gain across the masterplan area. Proposals to enhance the public realm will seek to explore opportunities for urban greening to enhance biodiversity and ecological value.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation

Legal Implications:

The proposed Regeneration Framework is a non-statutory, informal document. There are therefore no statutory requirements for consultation or adoption of the document. If approved by Cabinet, it will not form part of the statutory development plan, and the force of s38(6) of the Planning and Compulsory Purchase Act 2004 will not apply to it. It will be a material consideration to which regard may be had in consideration of planning applications, but it will carry less weight than a Supplementary Planning Document. It will not be a document with which development control decisions must accord unless material considerations indicate otherwise.

Financial Implications:

The costs associated with this are covered within the capital programme.

Appendices:

Appendix A – Mill Gate 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 \(bury.gov.uk\)](#)

Mill Gate Strategic Regeneration Framework – Cabinet November 2023

<https://councildecisions.bury.gov.uk/documents/s37663/Mill%20Gate%20Strategic%20Regeneration%20Framework.pdf>

Draft - Mill Gate Strategic Regeneration Framework

<https://councildecisions.bury.gov.uk/documents/s37664/Mill%20Gate%20Strategic%20Regeneration%20Framework%20-%20Appendix%201.pdf>

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

Term	Meaning
RF	Regeneration Framework
JV	Joint Venture

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Mill Gate.

BURY MILL GATE REGENERATION FRAMEWORK



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Introduction.

1

Introduction

1.1



- 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.



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.

Structure of the Regeneration Framework



Report Navigation

This Regeneration Framework follows the below structure:



Section 01: Introduction

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



Section 03: Site Analysis

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



Section 02: Drivers for Regeneration

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



Section 04: Development Principles

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



Section 06: Landscaping & Public Realm Strategy

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



Section 08: Glossary

- An overview and explanation of terms used within the document.

Framework Area

1.4



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

The Framework Area is informed by the ownership of the Joint Venture. A number of additional areas of land have been included within the Framework area to extend to include areas of the public realm, within the ownership of Bury Council.





Key

- Mill Gate Regeneration Framework
- Bury Town Centre Masterplan
- Conservation Area



Challenges

1.5



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, including an over dominance of servicing yards and car parking, 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.

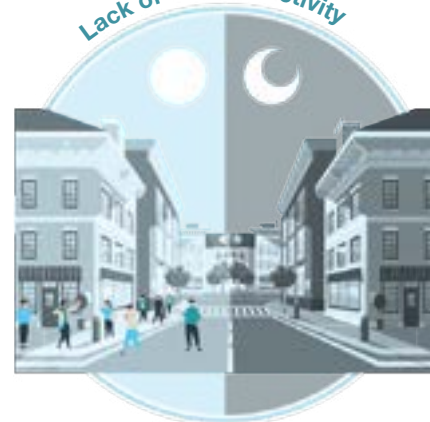
Retail Mix



Limited residential offer



Lack of evening activity



Low quality public spaces



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.



The Vision + Objectives

1.7



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 and unique 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 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 individuals, 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 Biodiversity 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.

Planning Policy + Guidance

1.8



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
- Greater Manchester Joint Minerals Plan – 2013
- Greater Manchester Joint Waste Plan – 2012

The Council is also currently progressing a new Local Plan which, once adopted, will replace the saved policies of the Bury UDP.

At the time of writing, PfE is due to be formally adopted in early 2024. It is therefore presumed that PfE will form part of the Development Plan, when the first planning application is brought forward within the Mill Gate Framework Area.

In addition, Bury has been working alongside eight other Greater Manchester districts to prepare the Places for Everyone Joint Development Plan (PfE). This was submitted

to the Government for examination in February 2022. The Inspectors have now concluded their examination of the plan and have issued their findings and recommendations in their Inspectors' Report which was received on 14 February 2024. In that report the Inspectors conclude that all legal requirements have been met and that, with the recommended main modifications, PfE is sound.

The nine districts will be seeking Council approval during February and March 2024 to adopt PfE with effect from 21 March 2024. Once PfE is adopted it will become a key part of the statutory development plans of each constituent district, including Bury, and would be given full weight in the determination of any planning applications to be submitted within the Mill Gate Framework area.

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

National planning policy and guidance, including:

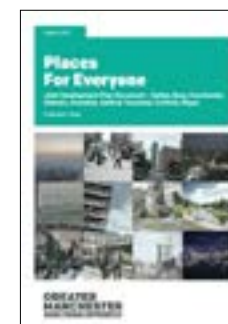
- National Planning Policy Framework (2023)
- National Planning Practice Guidance
- National Model Design Code (2021)

Regional and sub-regional policy and guidance, including:

- Greater Manchester Strategy 2021-2031
- Places for Everyone (PfE) Main Modifications Draft (2023)
- 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
- Bury Economic Development Strategy 2024 - 2034



Planning Policy and Guidance Front Covers

Engagement

-

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



Status of the Regeneration Framework



This Framework has been subject to a period of public consultation. Following the consultation period, the responses received have been considered and, as required, the Framework has been updated.

This updated Framework will be considered by Bury Council's Cabinet for endorsement.

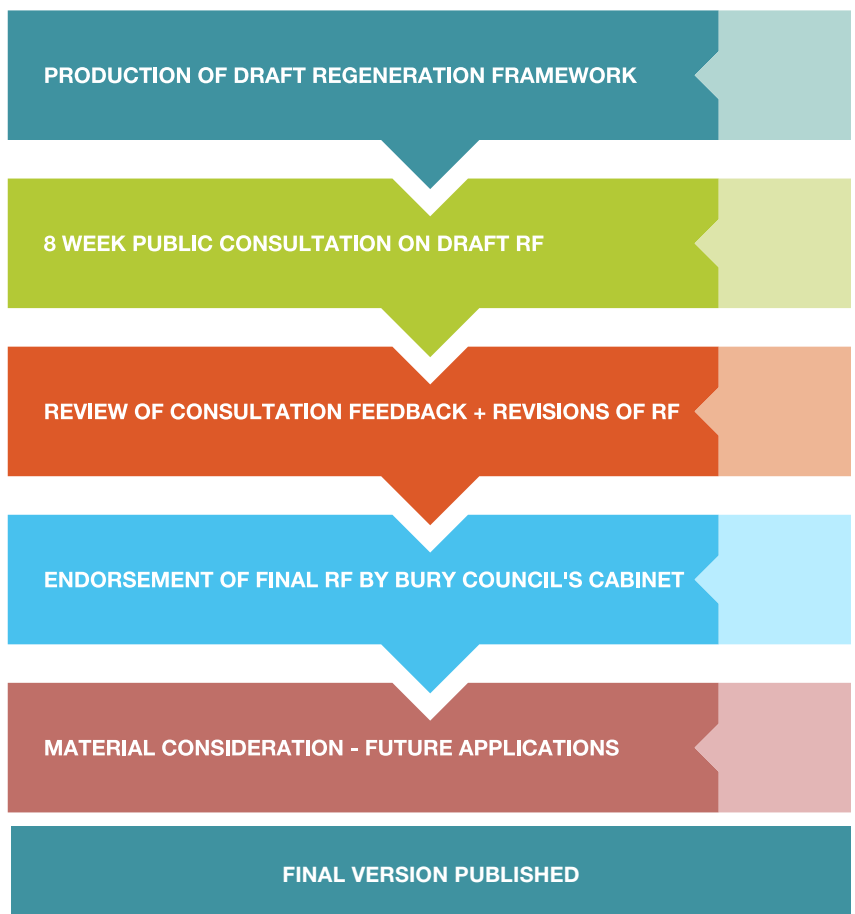
Once endorsed by Bury Council, the Mill Gate RF will act as a material consideration for the Local Planning Authority in the determination of future planning applications that fall within the Framework area.

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.



The Team

1.11



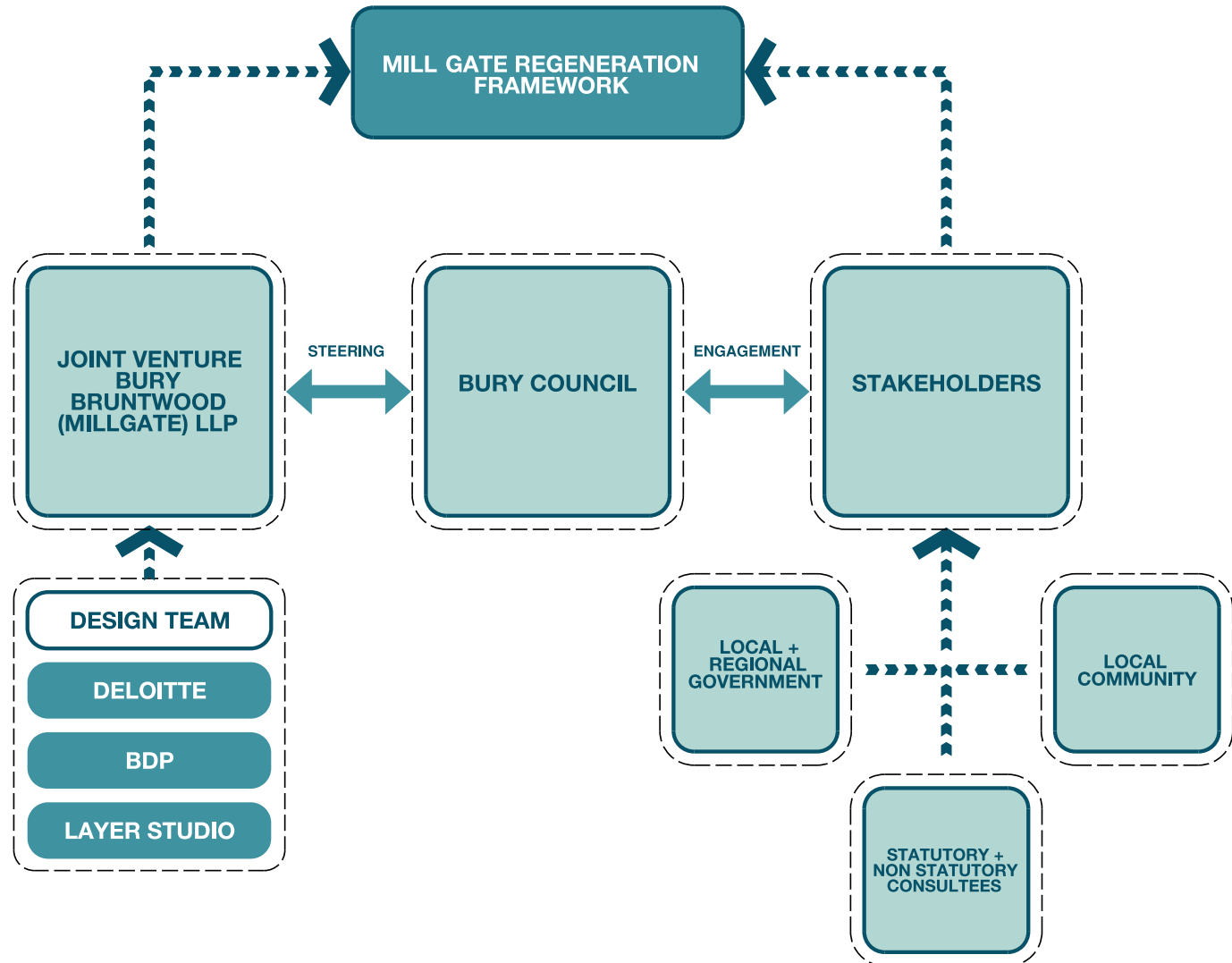
Project Team

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 it 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

Strategic Regeneration

2.1



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//
2//
3//

Bury Interchange - Metrolink
Manchester Piccadilly Station
The Rock -Northern Powerhouse Study



Mill Gate.

Role of the High street

2.2



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, value brands. Today, retail units within the Mill Gate struggle to attract national and regional brand 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//
2//
3//
4//

High Street Amenity Spaces
High Quality Homes
Places to Work
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.



NORTHERN |  **HM Government**
POWERHOUSE

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 important 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

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 this 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 Bury's 2030 "Let's Do It!" Strategy and the Bury Economic Strategy 2024-2034. 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 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

Site Overview

3.1



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.



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

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 and New Look) 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 coachfuls 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 football 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.

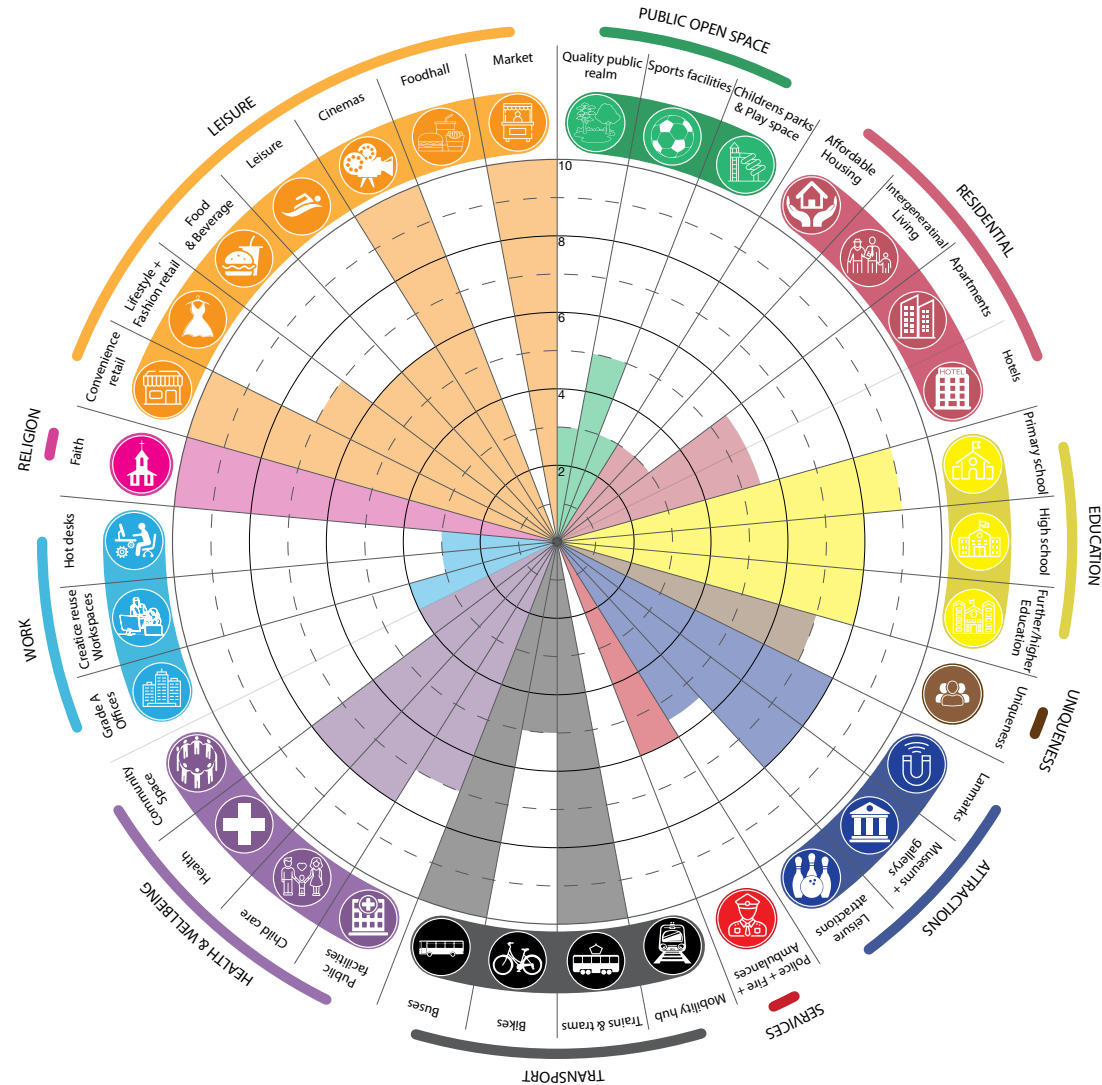
The approach of the Mill Gate to the south is most notable, with the impact of the arterial Angouleme Way compounding the feeling of being a back to the town centre when it is a place where many arrive.



Existing Building Use Analysis

The adjacent Town Centre analysis tool has been utilised to assess 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.

Key

- 1/2 Storeys
- 3/4 Storeys
- 5/6 Storeys
- 7/8
- 9+ Storeys



The Bury Palette

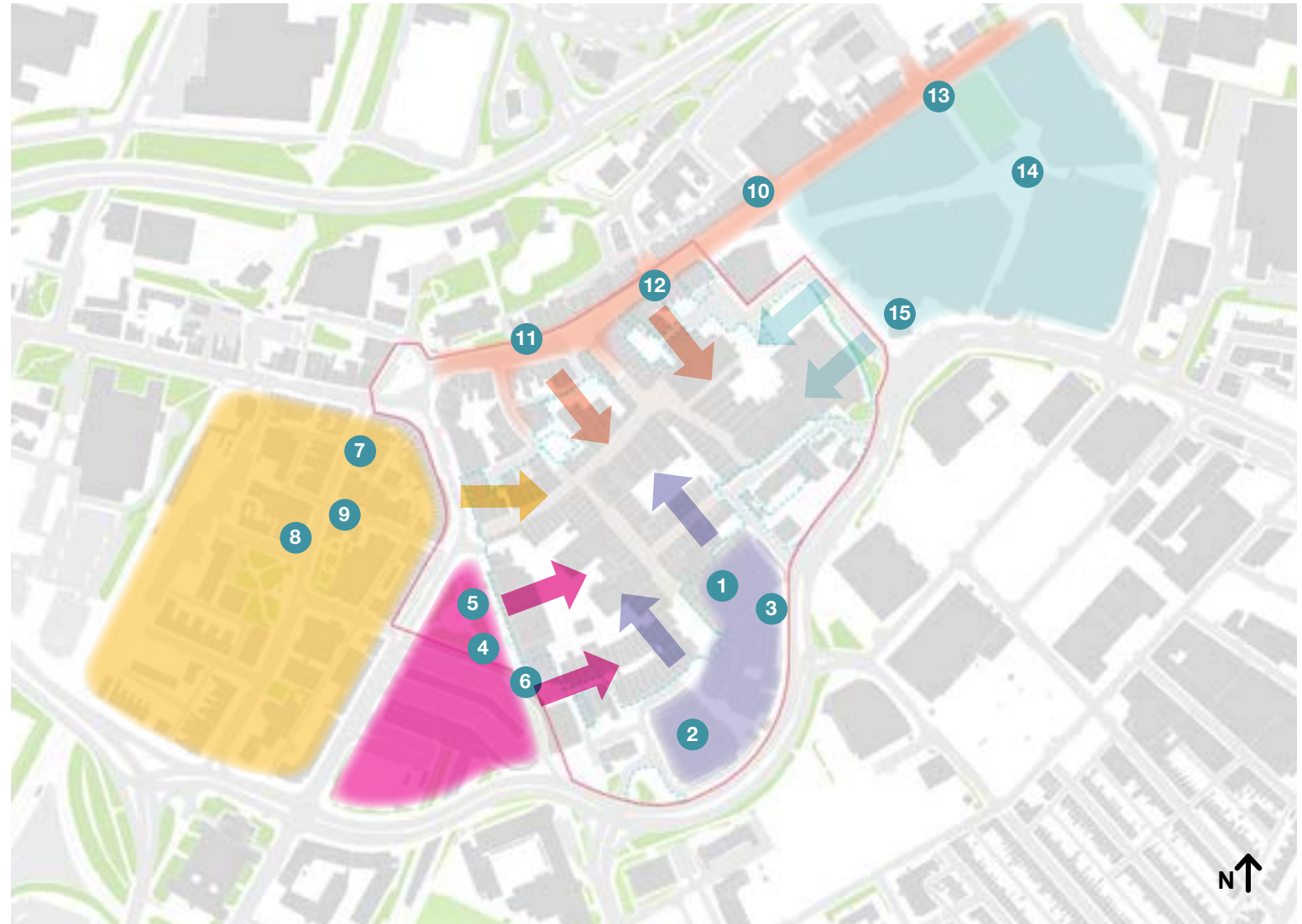
As described earlier in this section the site and surrounding context has a rich history and character that can help provide the Mill Gate redevelopment with several cues and inspirations from which to work.

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

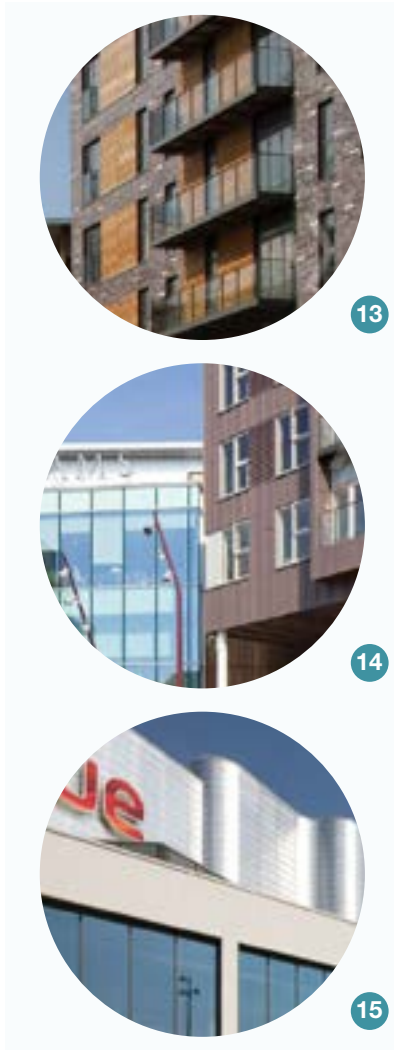
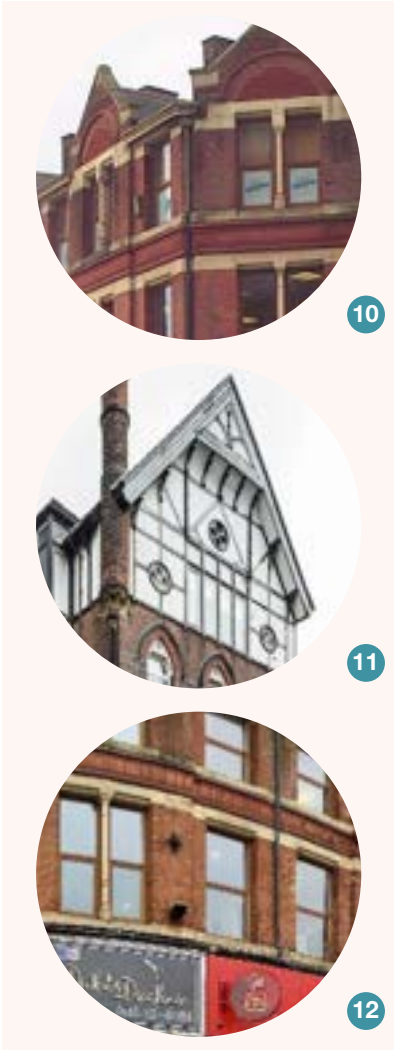
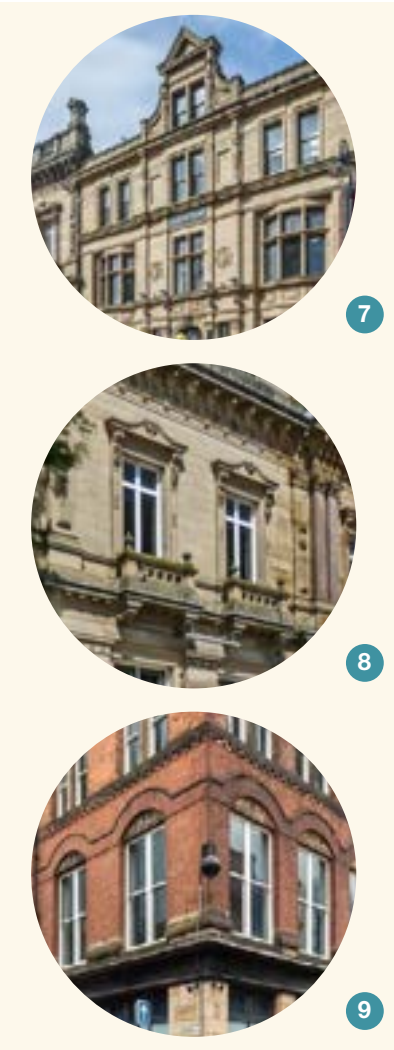
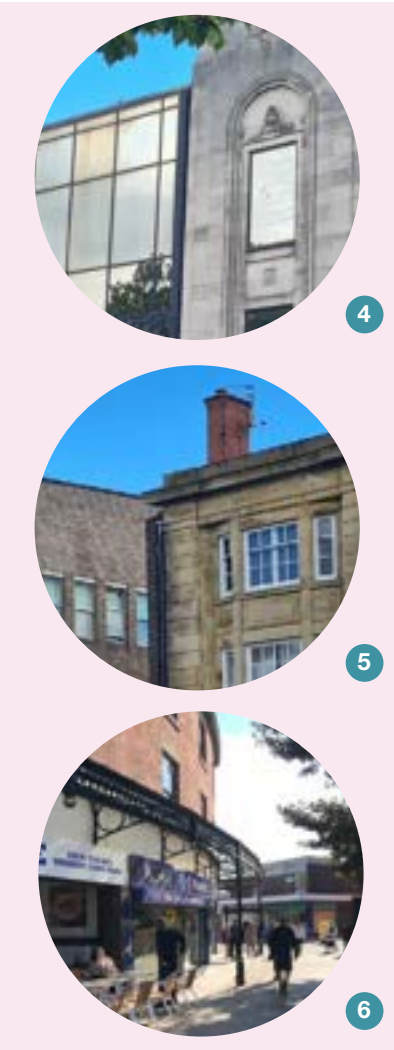
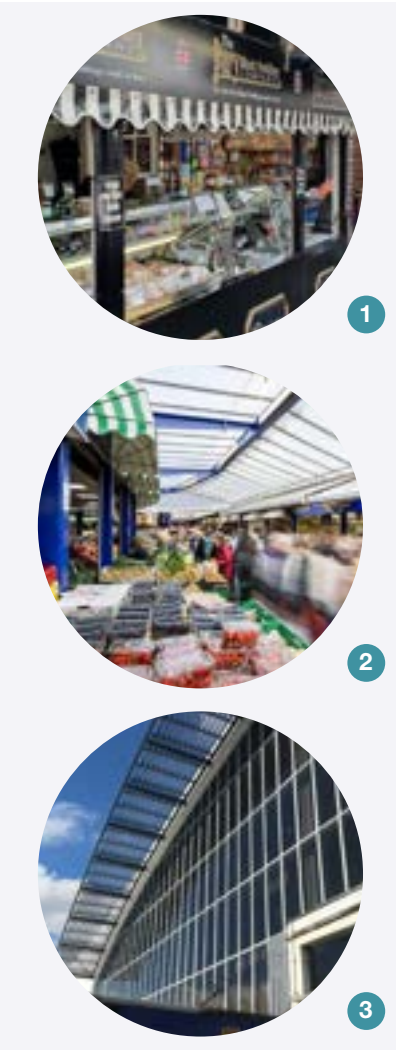
ARCHITECTURAL STYLE //
Contemporary / Victorian / Edwardian / Art Deco / Tudor

THE ROCK

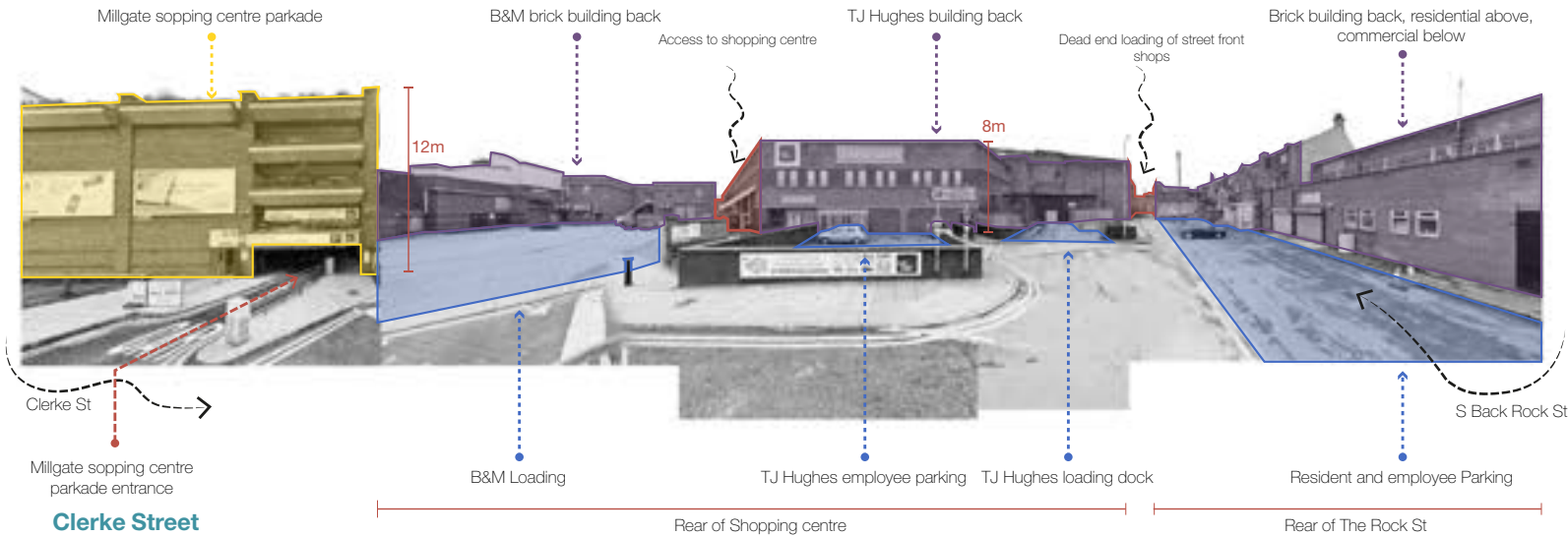
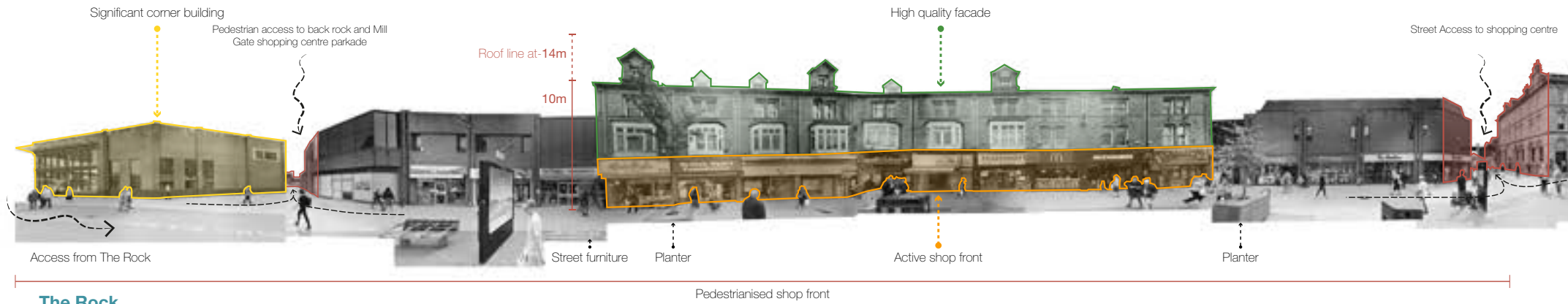
MATERIALITY //
Brick / Metal / Timber / Curtain Walling

ROOFSCAPE //
Flat

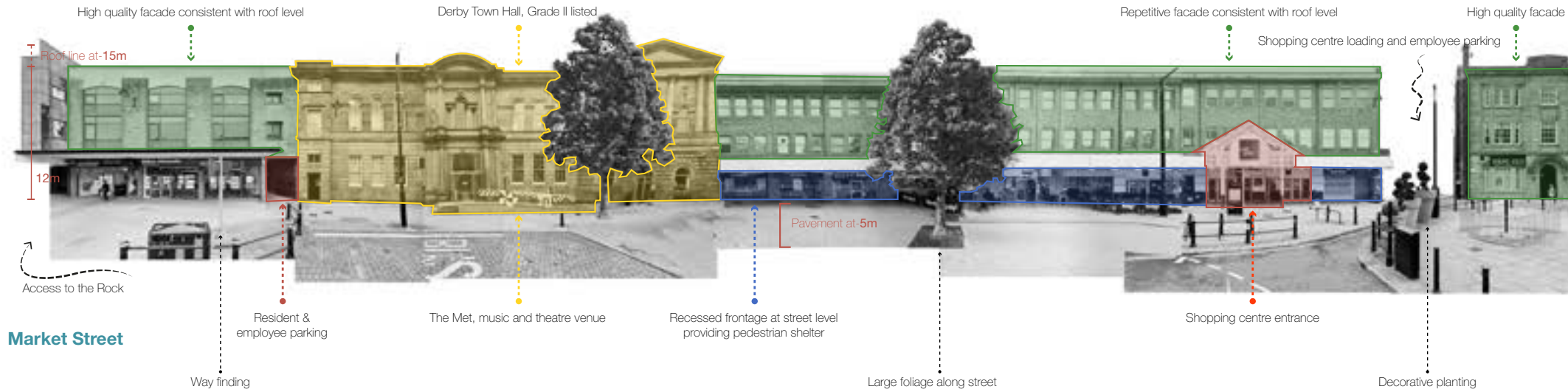
ARCHITECTURAL STYLE //
Contemporary



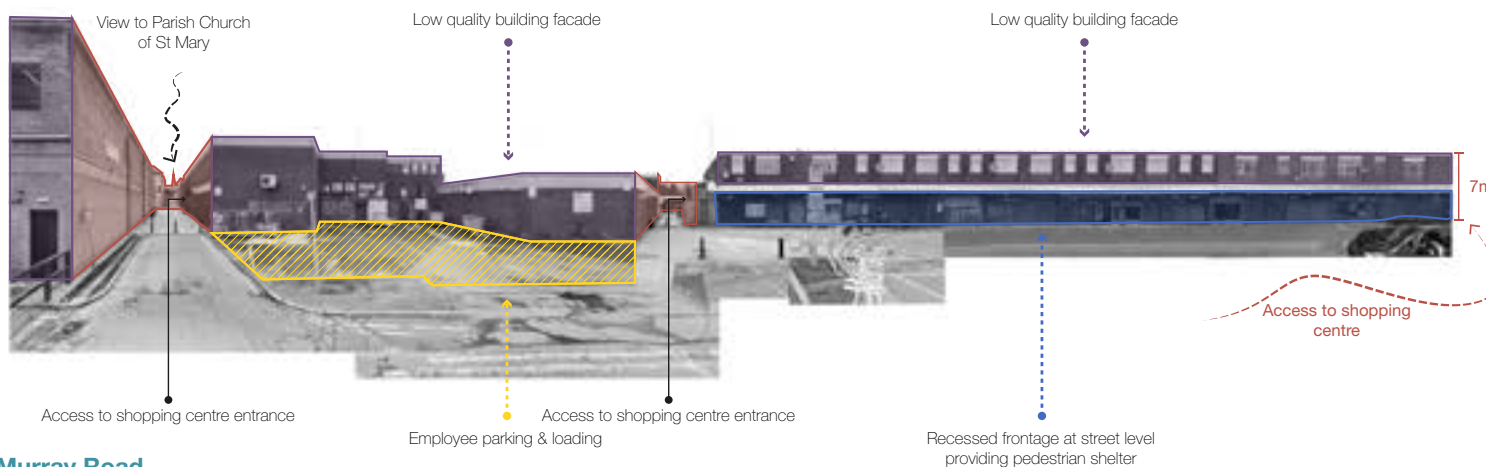
Existing Street Scenes



Existing Street Scenes



Market Street



Murray Road



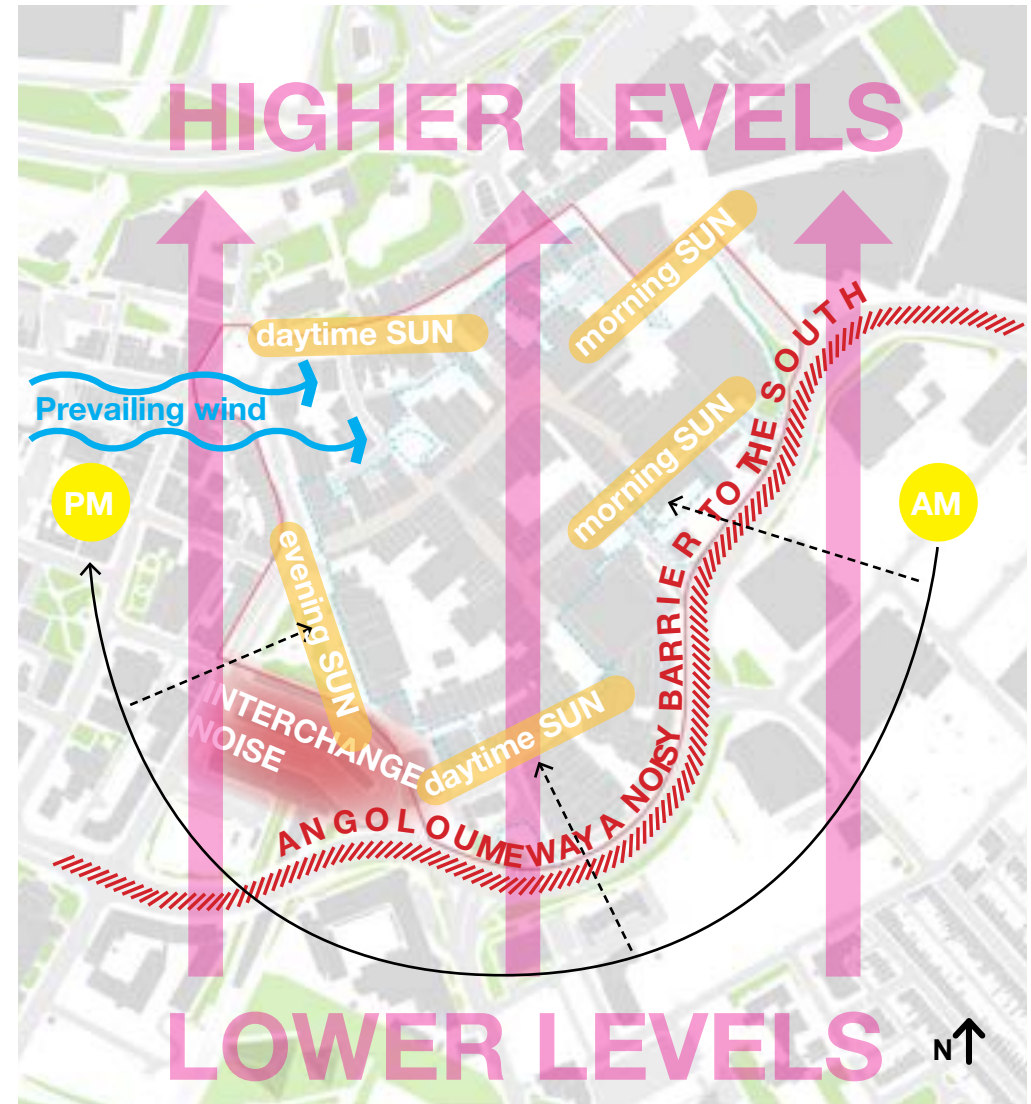
Street Scene Location Plan

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

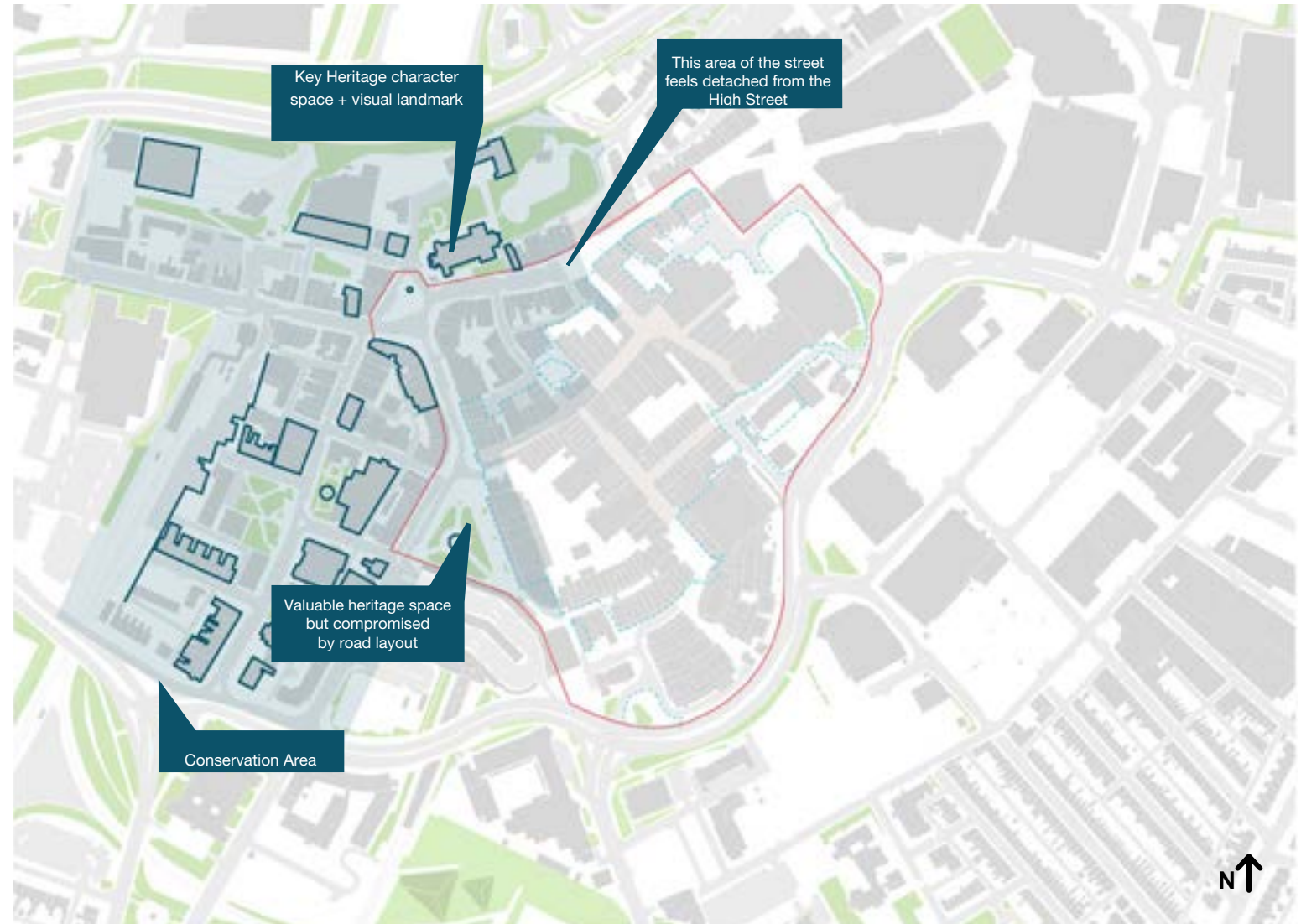
Heritage, Landmarks + Key Views

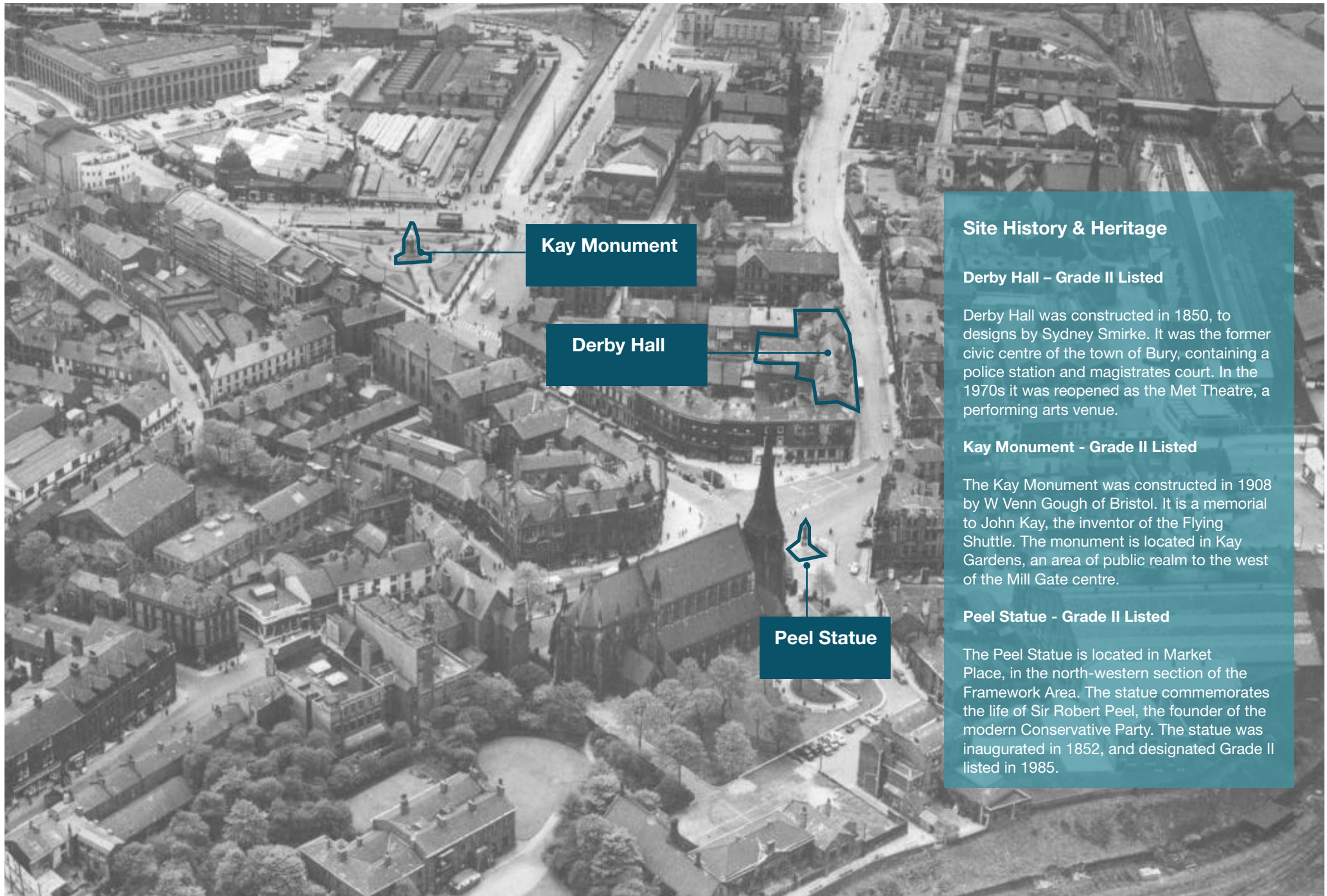
Listed Buildings +
Conservation Areas

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.



**Kay Monument****Derby Hall****Peel Statue**

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

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.

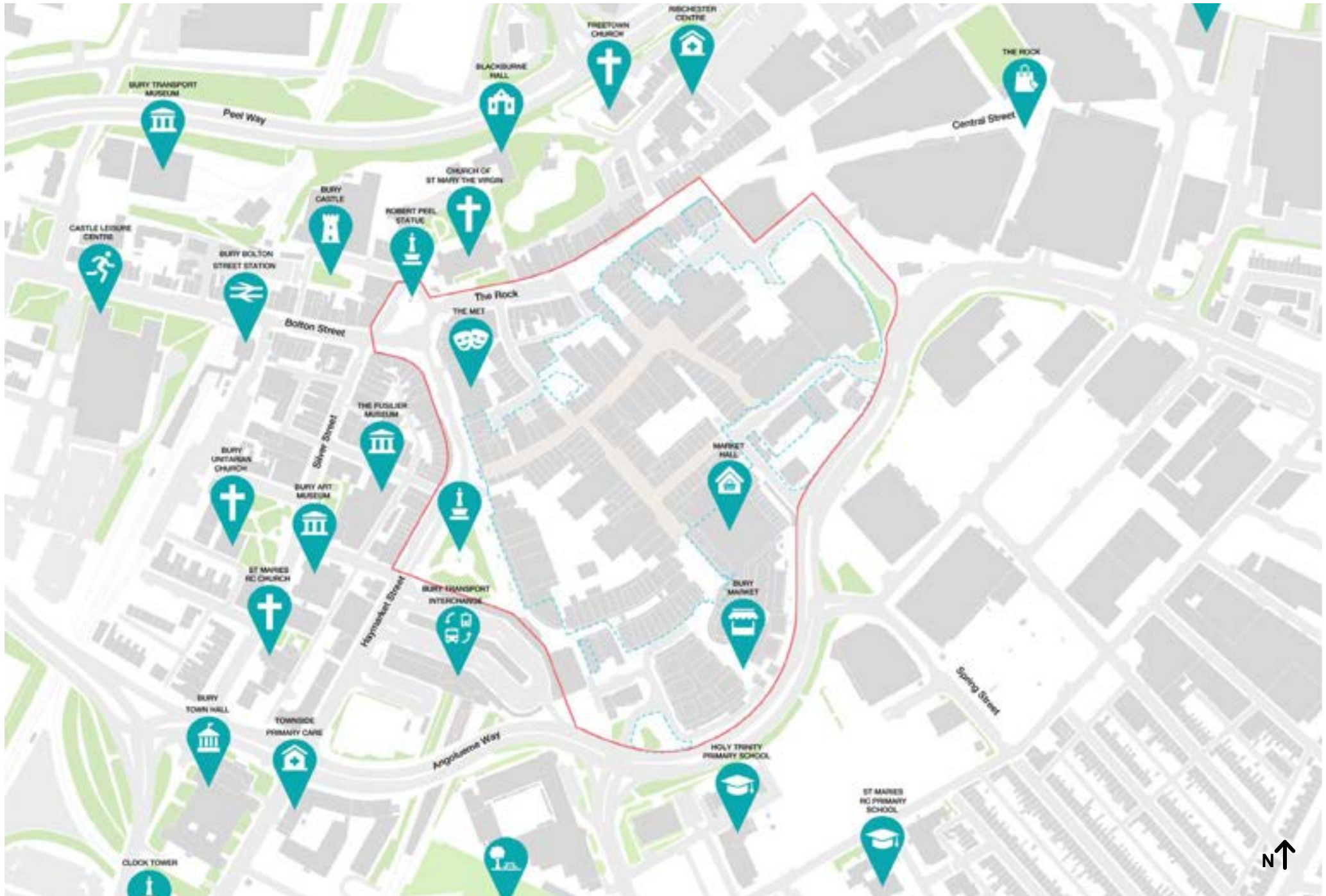
St Mary's Church

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.





1



2



3



4



5



6



7



8

- 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 Kay Gardens 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

3.4

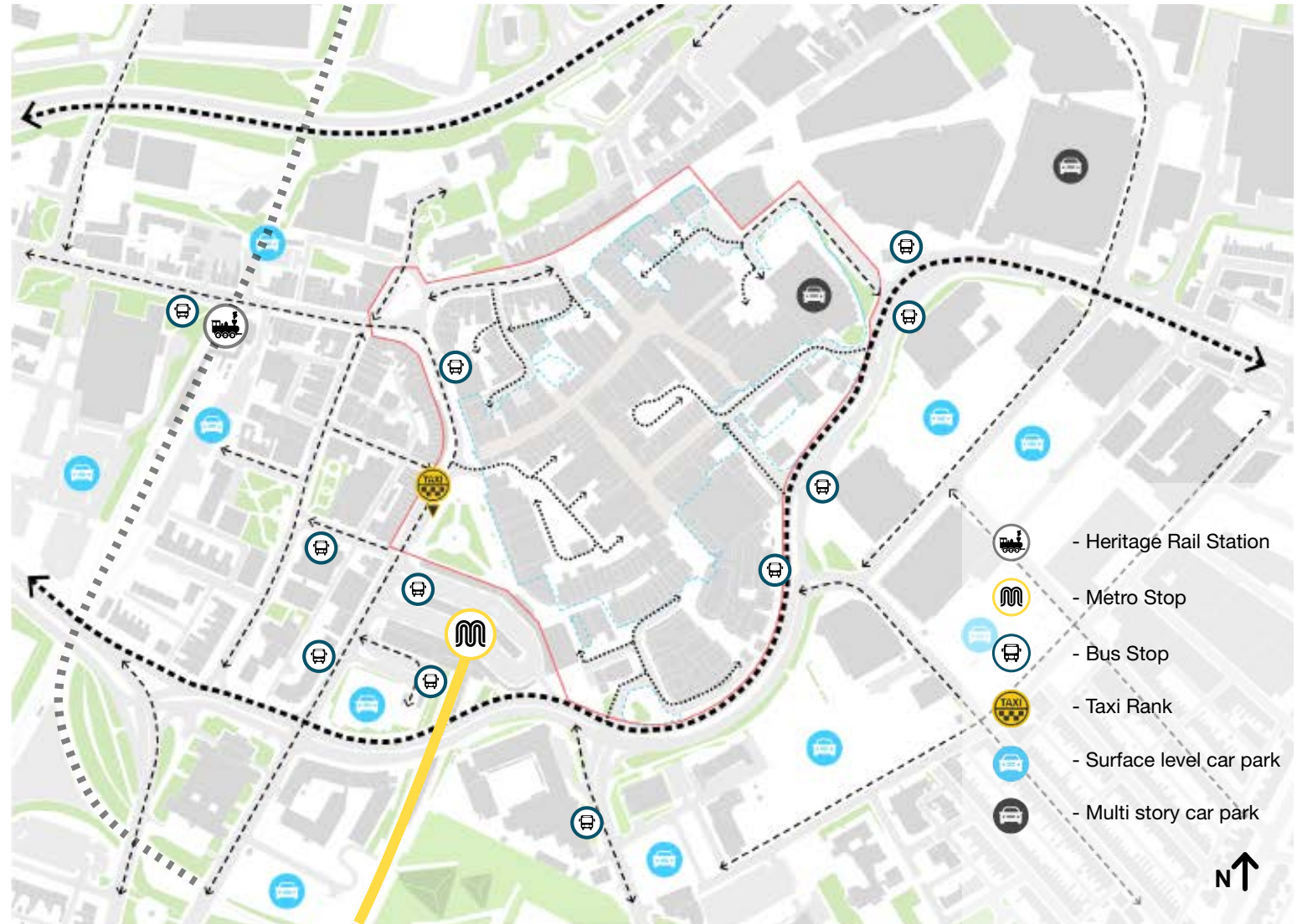
Connectivity + Public Realm



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).



Service Yards

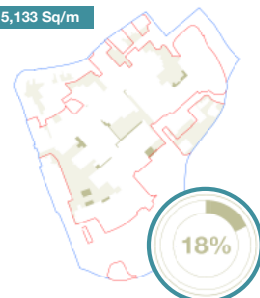
The Mill Gate is dominated by service yards, making up in the region of 18% of the site area. Some of these are very large designed to accommodate a higher frequency and demand by tenants on vehicle type that does not match modern retailer requirements.

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 Angouleme 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



Key

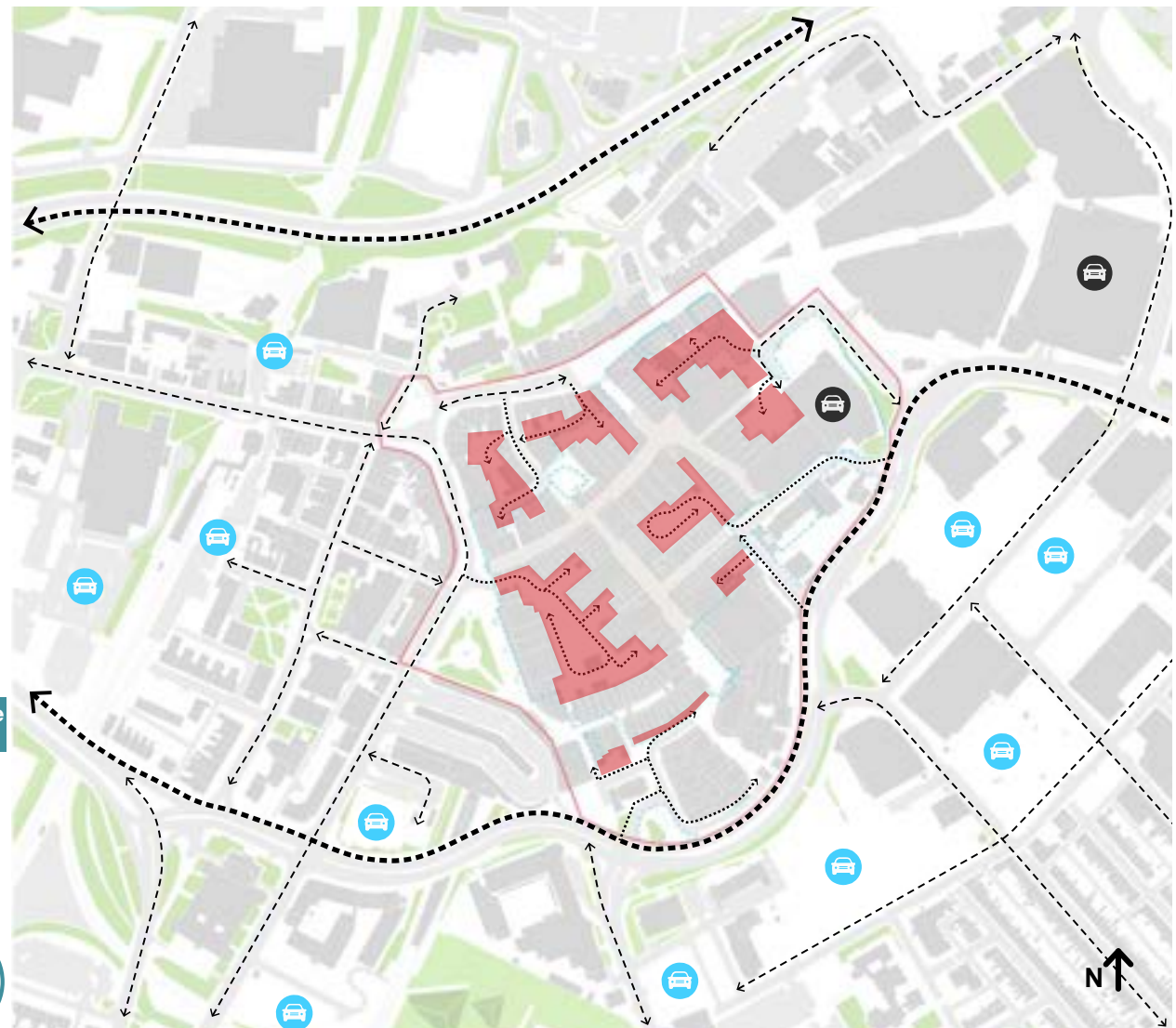
----- - Service Vehicle Movement

■ - Service Yard

 - MSCP

 - Surface carpark

— - Primary Vehicle Movement



Service Movement and Parking Plan

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.

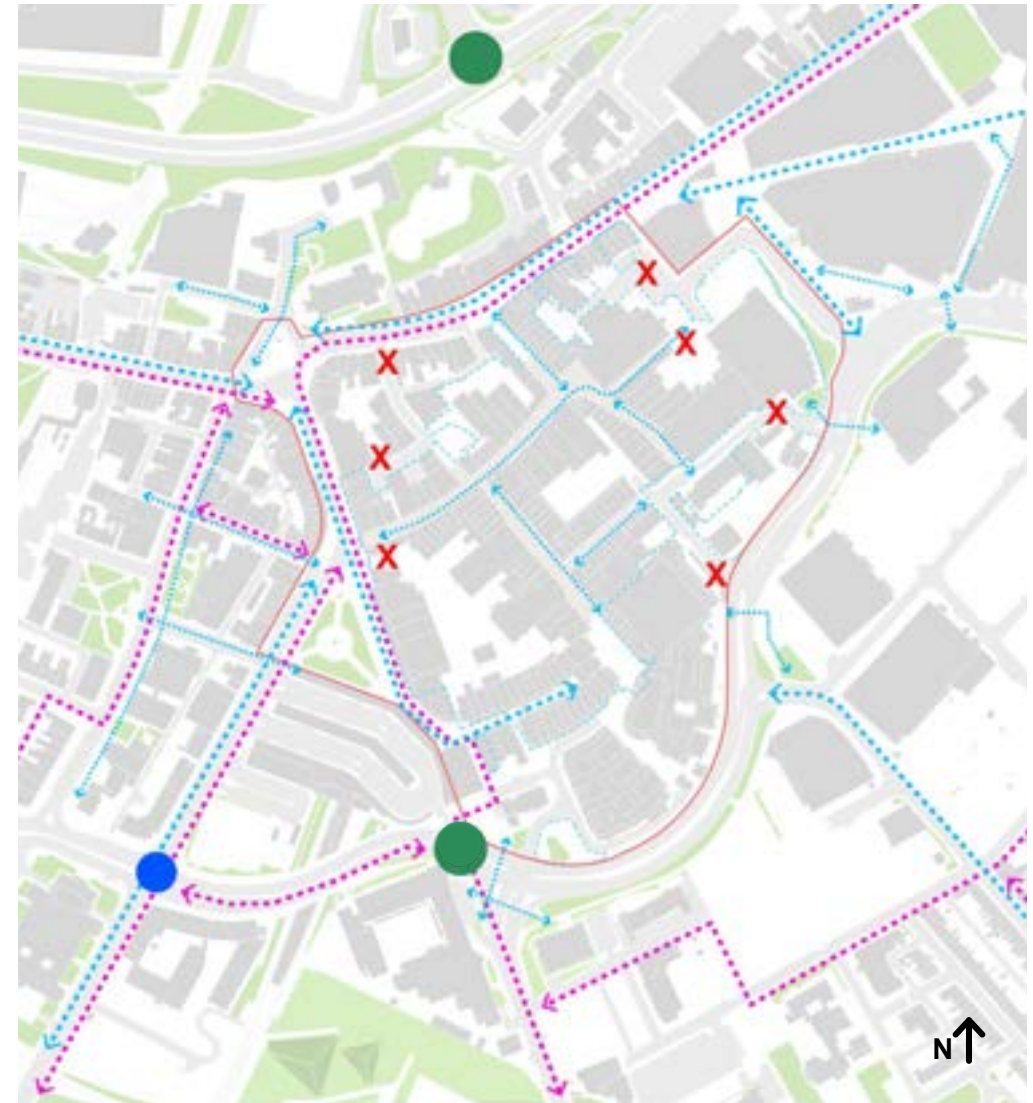
The Mill Gate is open between 09:00 and 17:30, which limits the leisure and food & beverage offerings which can be operated successfully within those fixed parameters. This opening time is shortened by a further hour on Sundays and Bank Holidays.

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



Public Realm

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

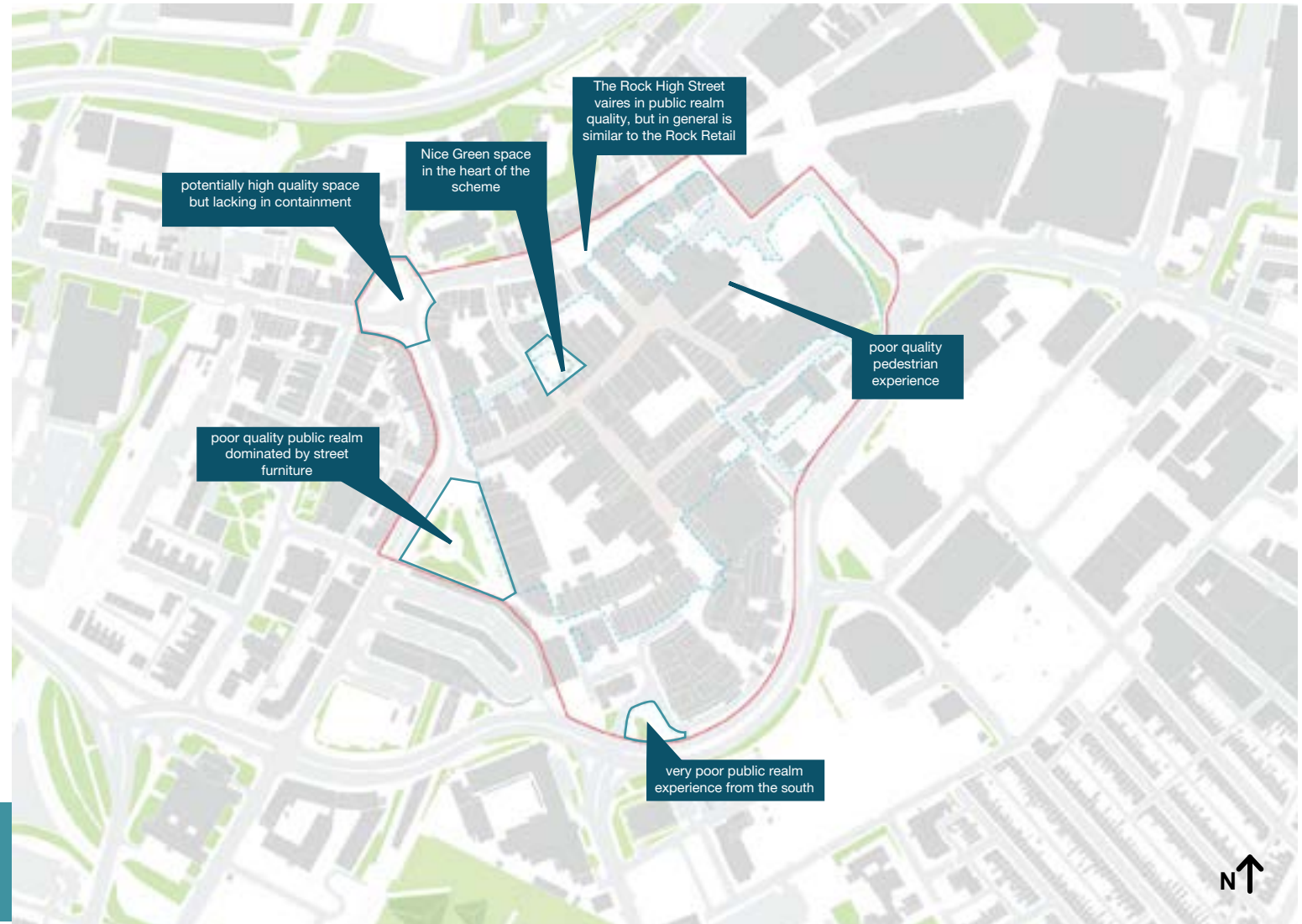
- **Kay Gardens**, to the west of the Mill Gate centre, features an over-provision of seat furniture and highway infrastructure with limited shelter for visitors. In its current configuration, the space lacks animation and is not regularly used. Antisocial behaviour is common in Kay Gardens.
- **Lions 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.

Key



- Key Public Space



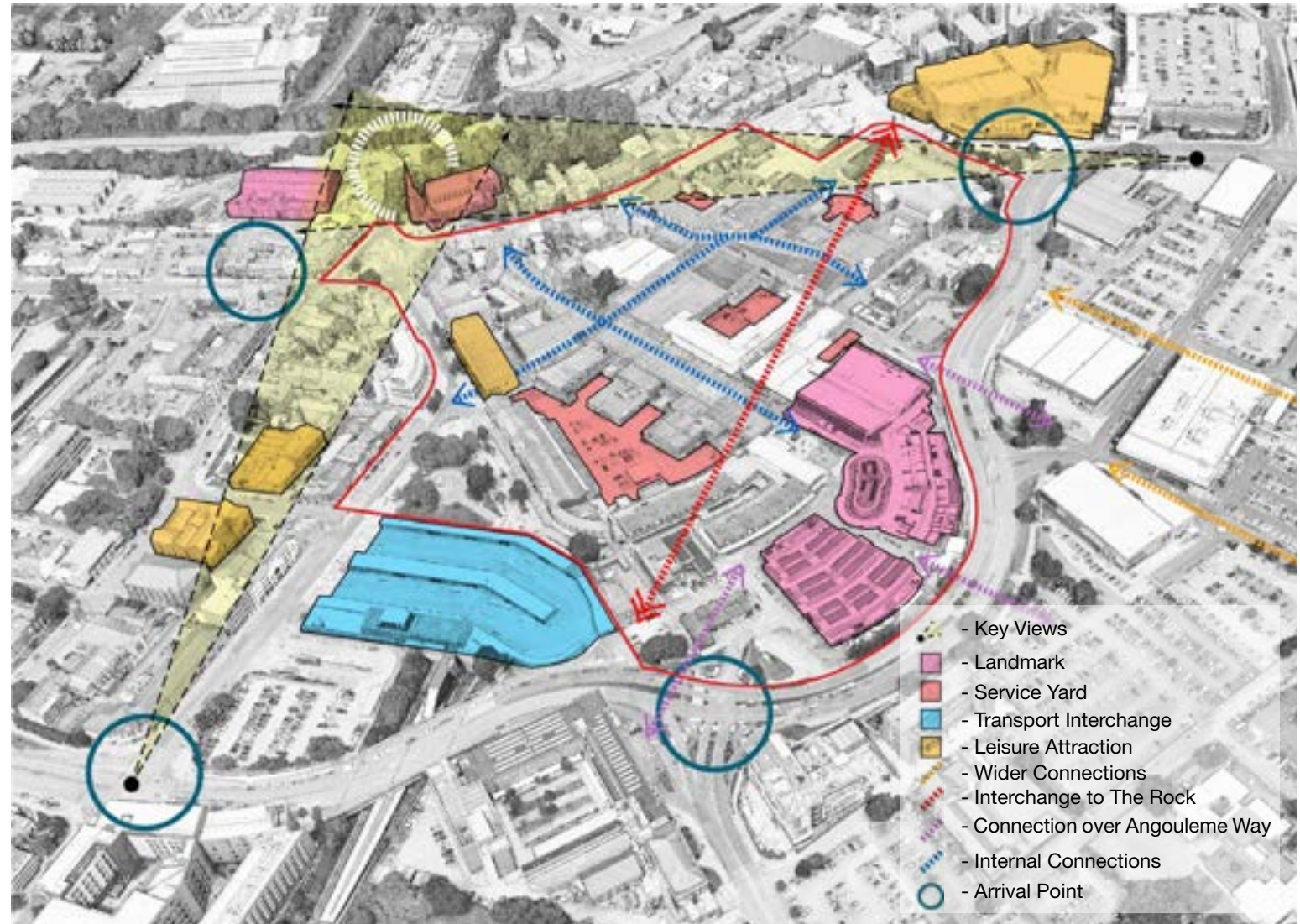
Site Opportunities

3.5



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

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 quantum per use for the masterplan are as set out as follows - these quantum 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 quantum 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 surrounding 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

- Future proposals will be expected to make a commitment to maximising use of local labour through construction, delivery and operation of future development phases.
- Future development proposals should engage with education providers and commercial occupiers to identify opportunities to support pathways to education, skills and employment. Consideration should also be given to potential use of non-residential spaces to be occupied by education and skills providers.



ENGAGING LOCAL VOICES

- Provide ongoing opportunities for community engagement, to deliver active participation that positively shapes 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 must 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.



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 from 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 demonstrate a minimum 10% biodiversity net gain ('BNG') from January 2024 as a requirement of the Environment Act 2021 which 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 considered, recognising the potential to provide shade and shelter from the sun, wind and rain.



4.4

A Sustainable Residential Community



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. This should include considering the potential needs of those with reduced or limited mobility.



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.

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.





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.



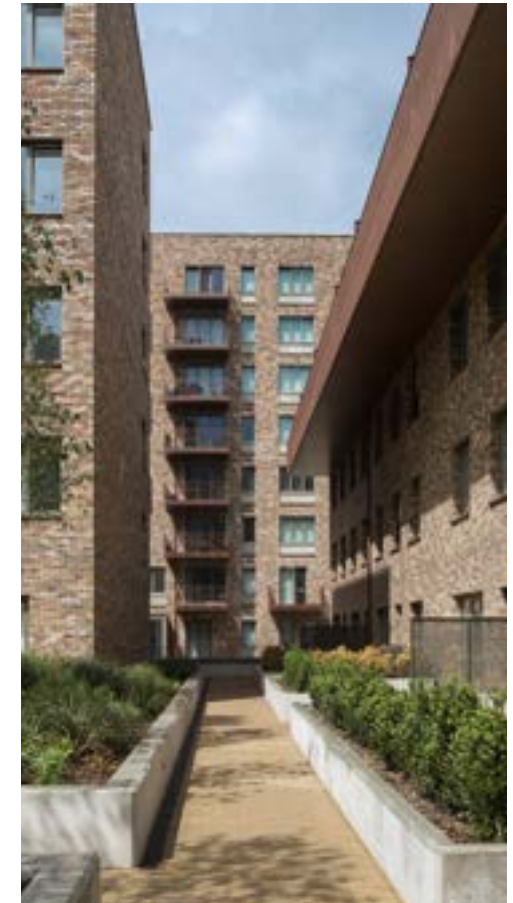
RESIDENTIAL STREETS AND SPACES

- 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 seek to ensure that future residents have access to sufficient provision of dedicated open space (private, communal and / or public). 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.



A Diverse Town Centre Offer



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.

SUSTAINABLE RETAIL AND LEISURE STRATEGY

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.



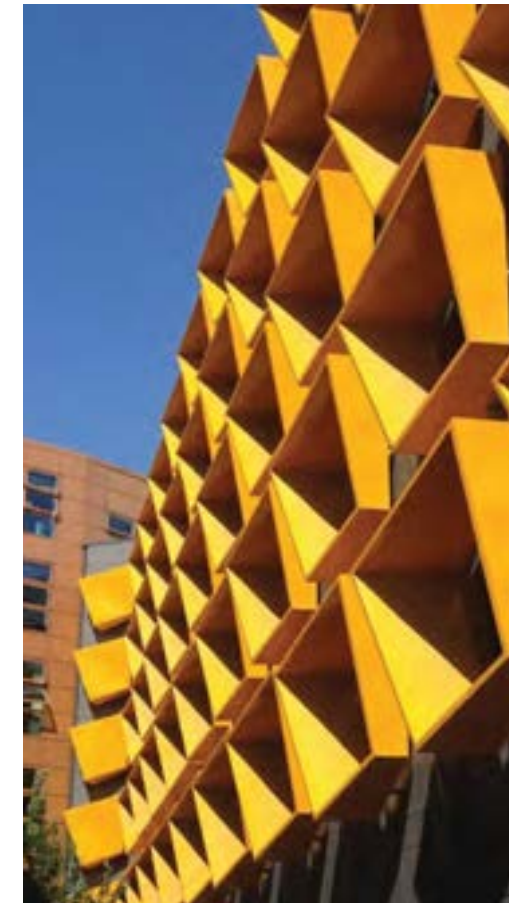
ACTIVE FRONTAGES

- 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 include 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 indoor and outdoor 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.





4.7

Key Connections, Public Realm + Placemaking



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.



HIGH QUALITY ARCHITECTURE

- 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 complementary 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 contribute 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, careful consideration should be given to building layouts and orientations. This should include 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 as 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 animated 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 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, including those with reduced mobility. 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

- 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.
- To maintain the quality of the public realm a long term management strategy should be prepared for the Mill Gate – the public realm within the JV's ownership will be maintained and managed by the JV. 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.
- 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.



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 deliver 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.



Transport and Highways



SUSTAINABLE AND ACTIVE TRAVEL

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.



- 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 (e.g. those with reduced mobility). 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.





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.



5.2

Understanding the Opportunity

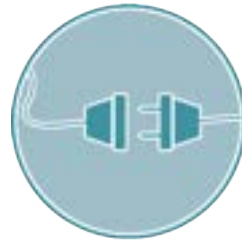


Key Considerations

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

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

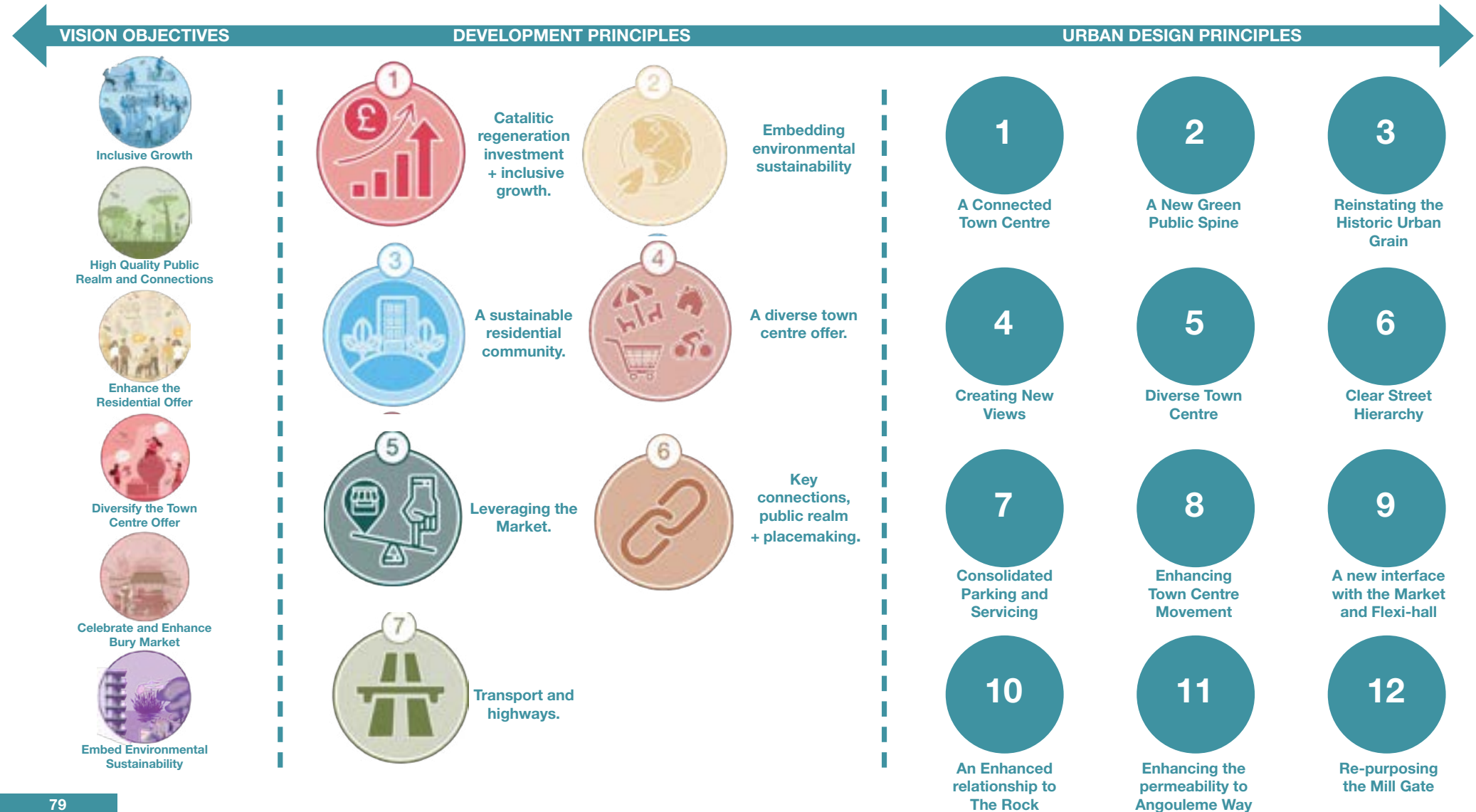
The illustrative masterplan for the Mill Gate brings together important existing characteristics of the Framework Area alongside new considered design strategies that respond to key existing site problems. The proposed masterplan significantly enhances the area and helps it achieve high potential - contributing 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.



Urban Design Principles

5.5

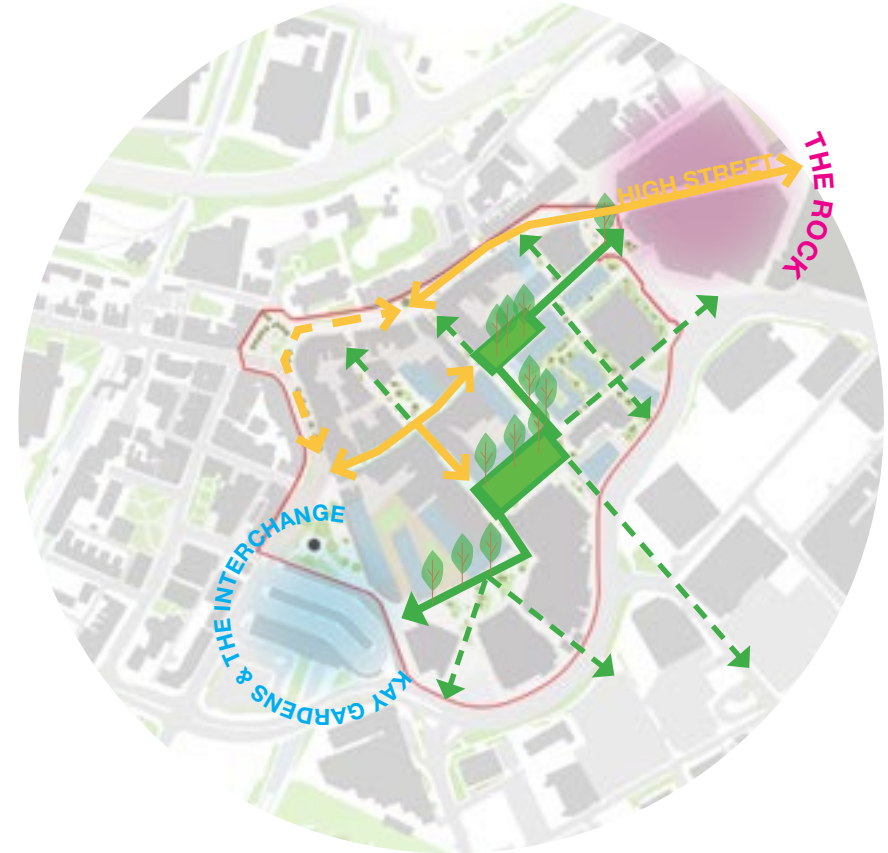


Key Interventions



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.

DEVELOPMENT PRINCIPLES



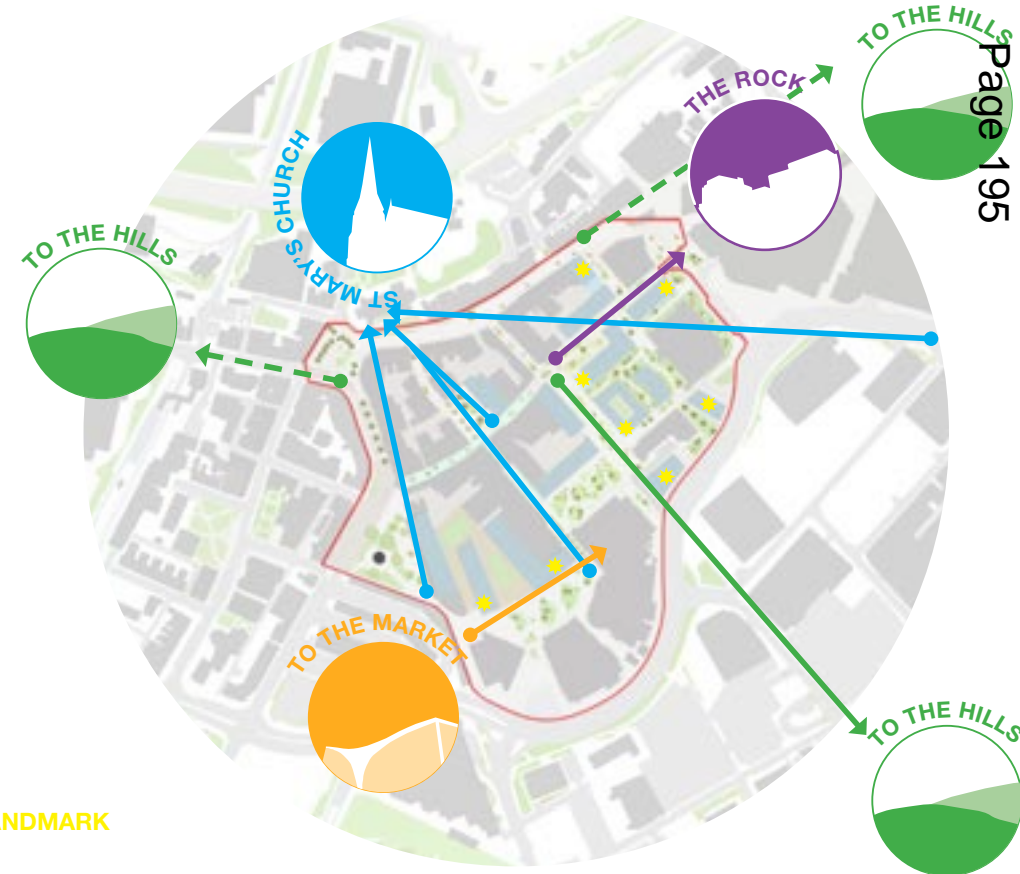
DEVELOPMENT PRINCIPLES





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.



* LANDMARK

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

DEVELOPMENT PRINCIPLES



DEVELOPMENT PRINCIPLES





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, cafes and bars and other town centre amenities supporting sustainable life styles, health and well-being.



6. CLEAR street hierarchy

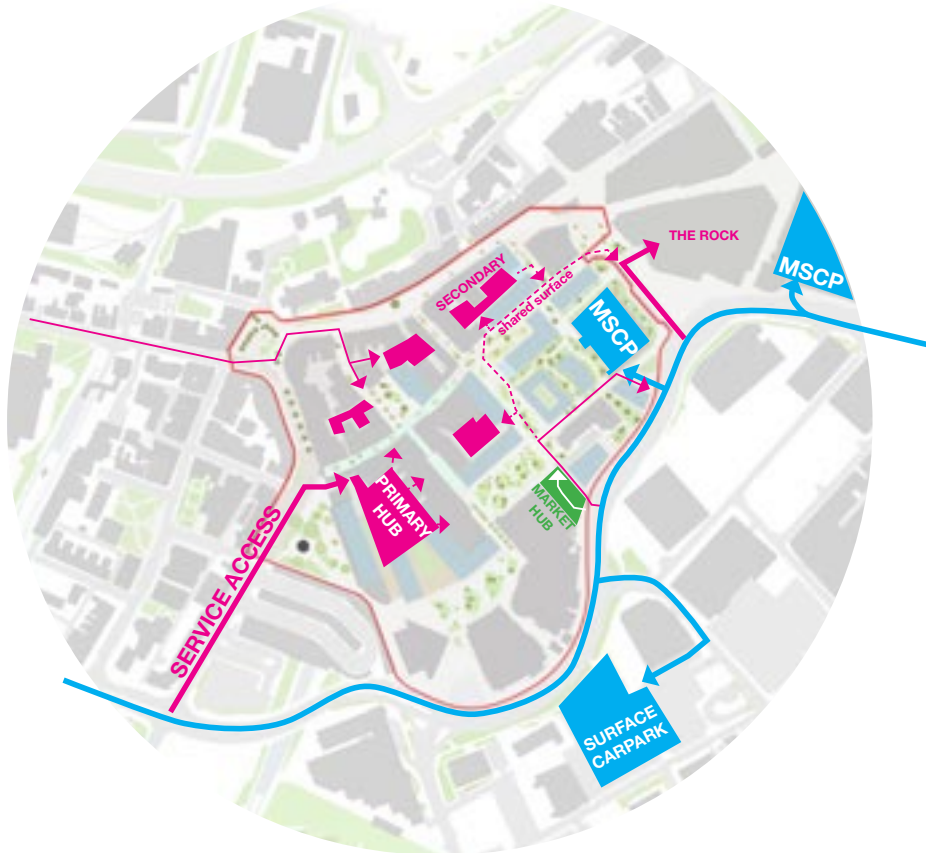
Creating a street pattern that is clear for users is a key principal. Primary streets will focus on public facing high street uses with retail, restaurants and leisure as a focus creating streets that feel vibrant and active. Secondary streets will continue this public facing activity, but be focused 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.

DEVELOPMENT PRINCIPLES



DEVELOPMENT PRINCIPLES





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

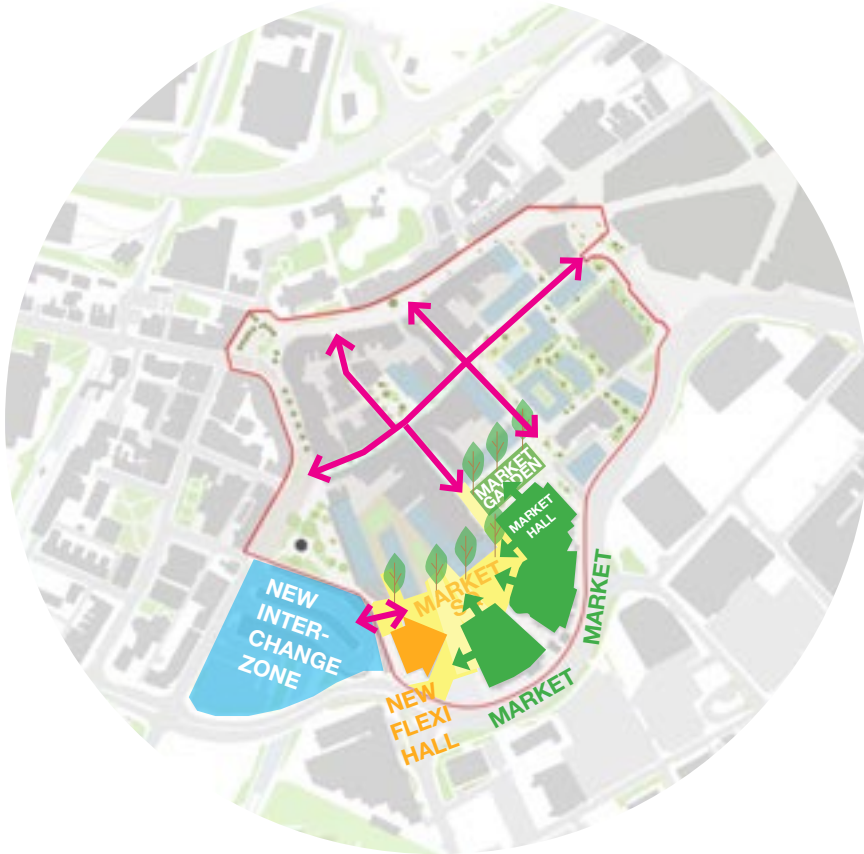
Part of reconnecting Mill Gate back into the town centre is enhancing movement along existing routes. Kay Gardens is a key arrival space in the town and one that is negatively impacted by highways and street furniture creating a space that feels unloved. Market Place is seen as a key opportunity to capitalise 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.

DEVELOPMENT PRINCIPLES



DEVELOPMENT PRINCIPLES





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.

DEVELOPMENT PRINCIPLES



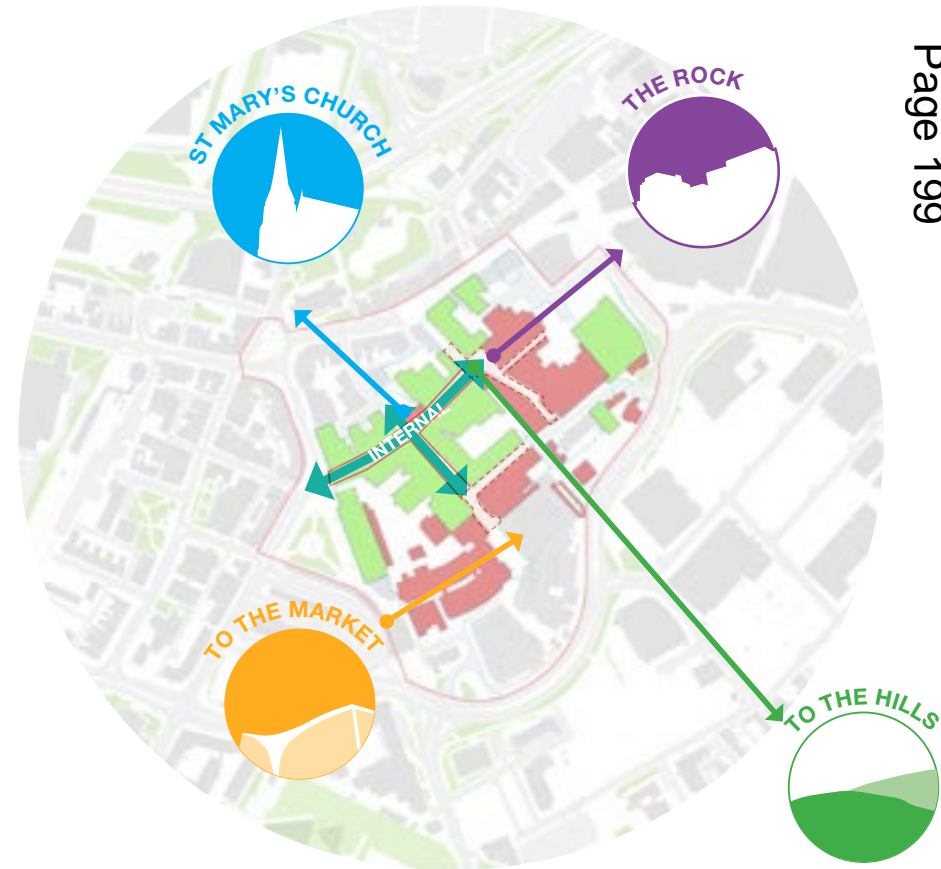
DEVELOPMENT PRINCIPLES





11. Enhancing the PERMEABILITY across Angoulême way

Angoulême Way is a bypass style piece of highways infrastructure rather than one of placemaking and drawing people into the town. Creating enhanced connections across Angoulême 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 Bury's unique townscape.

DEVELOPMENT PRINCIPLES



DEVELOPMENT PRINCIPLES



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.



Within the Mill Gate RF 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)

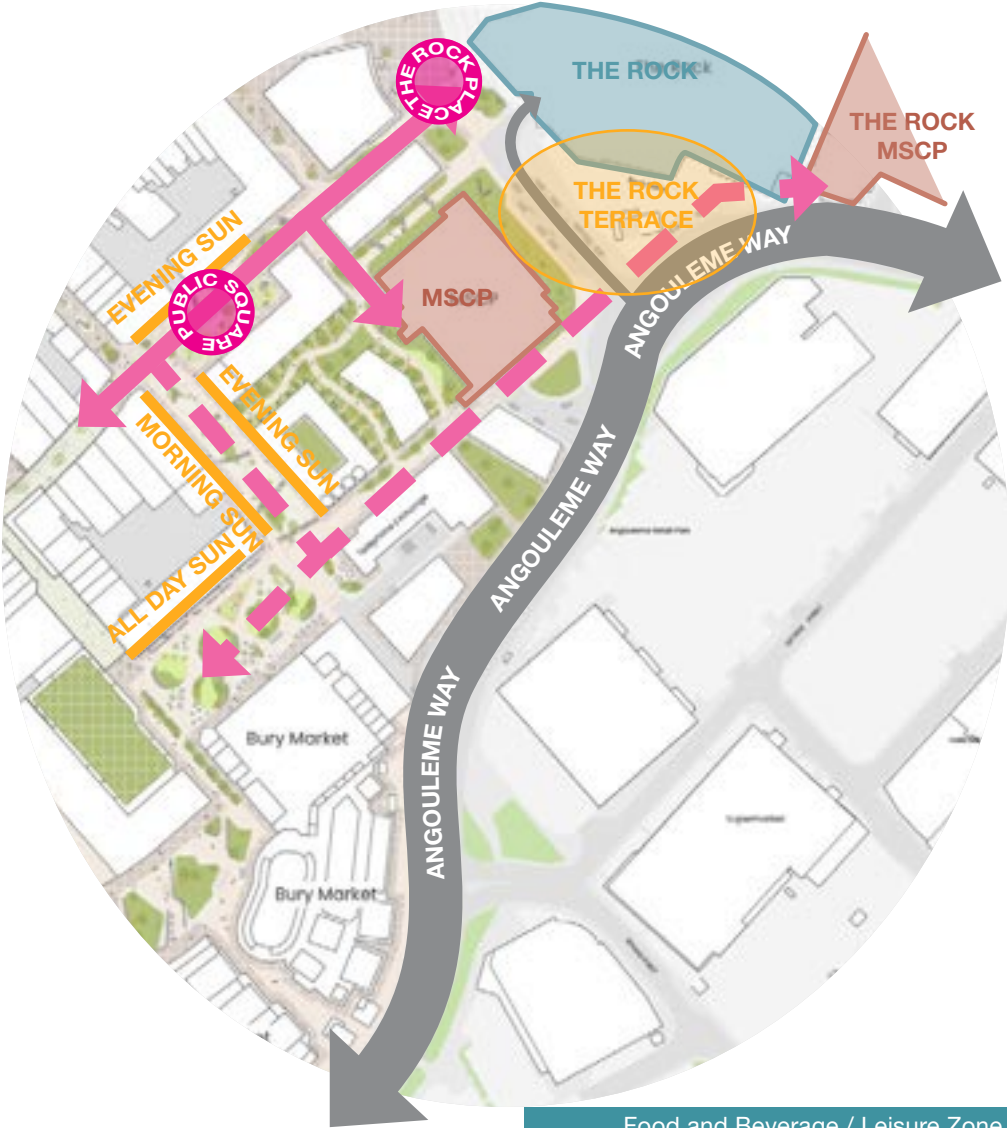
ROOFSCAPE //
Flat / Single Pitched / Punctuating Chimneys

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.



Food and Beverage / Leisure Zone

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

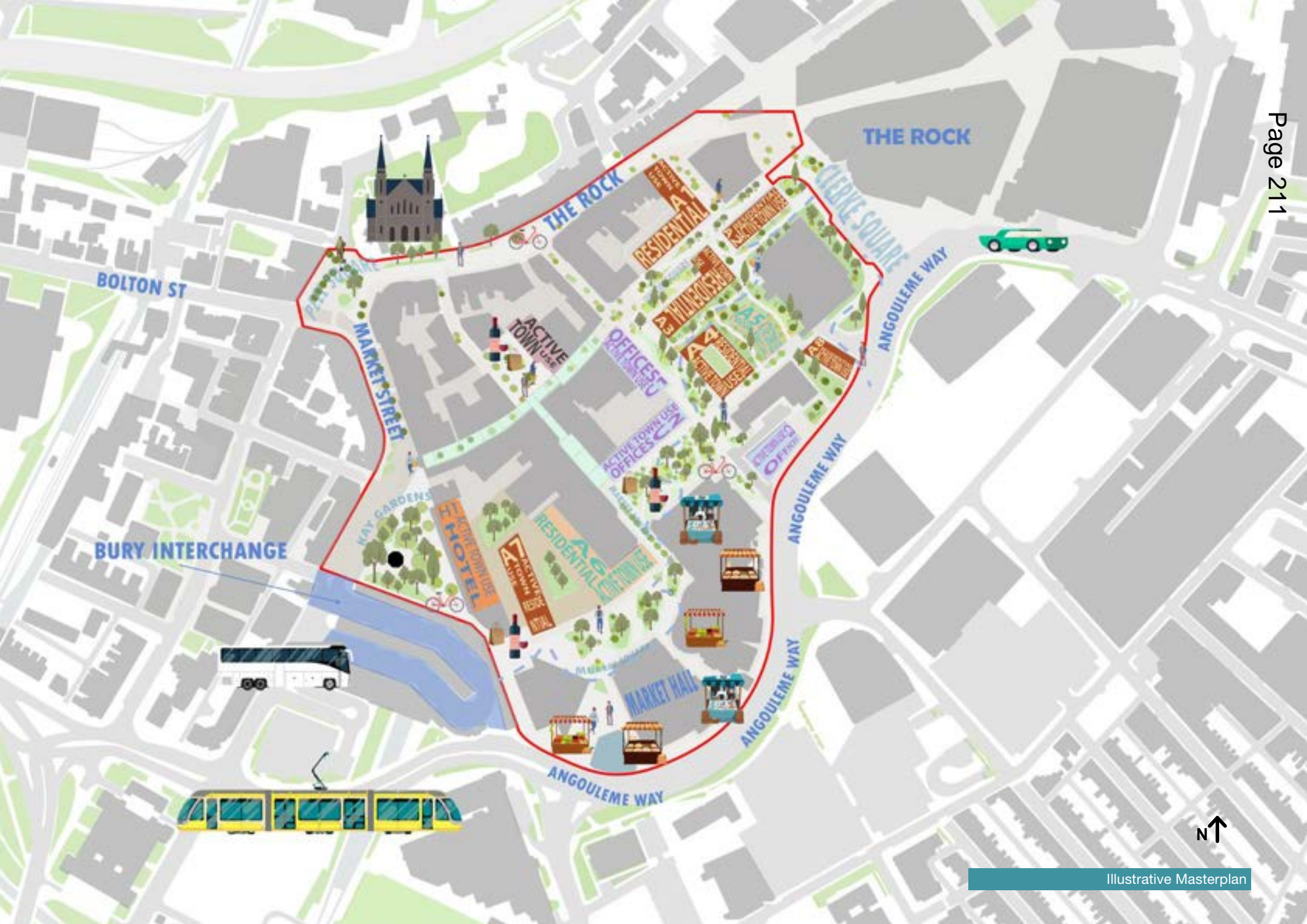
THE ROCK

MATERIALITY //
Brick / Metal / Timber / Curtain Walling

ROOFSCAPE //
Flat

ARCHITECTURAL STYLE //
Contemporary





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 |
| | - Retained Mill Gate Use |
| | - Proposed Flexi-hall |
| | - Existing Market |
| | - Existing Telephone Exchange |
| | - Existing Multi Story Car Park |



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 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

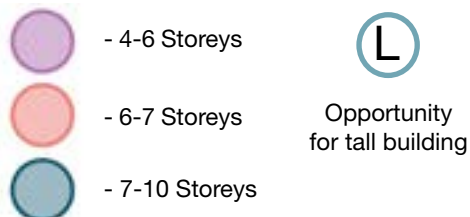
5.9

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.





5.10

Active Frontages and Interface Distances



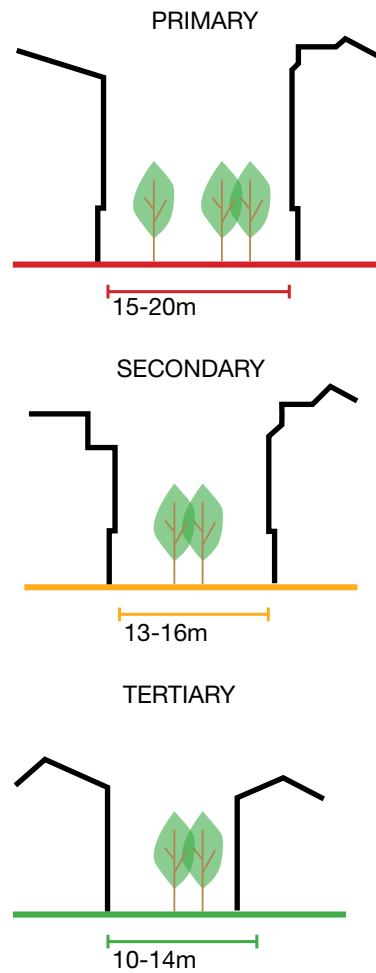
Active Frontages

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 multi-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

Interface Distances.



Key

- Primary Streets
- Secondary Streets
- Tertiary Streets





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 within 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





Landscaping & Public Realm Strategy

6

6.1

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 (RF). 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 RF 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.



Illustrative Landscape Masterplan

6.2











ILLUSTRATIVE LANDSCAPE MASTERPLAN




GENERAL INFORMATION

-  **SRF CORE AREA - 10.9ha**
-  **MILL GATE ESTATE BOUNDARY**
-  **SRF BURY COUNCIL / BRUNTWOOD JV BOUNDARY**

HARDWORKS

-  **PAVING TYPE A**
PEDESTRIAN PAVING 1
-  **PAVING TYPE B**
PEDESTRIAN PAVING 2
-  **PAVING TYPE C**
VEHICULAR BUILD UP PAVING
-  **PAVING TYPE D**
GREEN GAP PAVING
-  **PAVING TYPE E**
CROSSING POINT 'DECK'
-  **MACADAM**
TO VEHICULAR AREAS
TO ENGINEER'S DETAIL & SPECIFICATION
-  **MACADAM**
TO PEDESTRIAN AREAS
TO ENGINEER'S DETAIL & SPECIFICATION
-  **RAISED TABLE**
TRANSITION MARKER

SOFTWORKS

-  **PROPOSED TREE PLANTING**
-  **PROPOSED SHRUBS & GRASSES**
-  **LAWN**



Street Hierarchy

6.3



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.



- Pedestrianised
- Pedestrianised with emergency access
- Pedestrianised with managed service access
- Low traffic
- Regular traffic

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

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

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 final 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.

7.2

Introduction (Continued) & Indicative Phasing



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.

- Phase 1
- Phase 2
- Phase 3
- Phase 4
- Phase 5

Mill Gate.



Indicative Phasing

7.3



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.

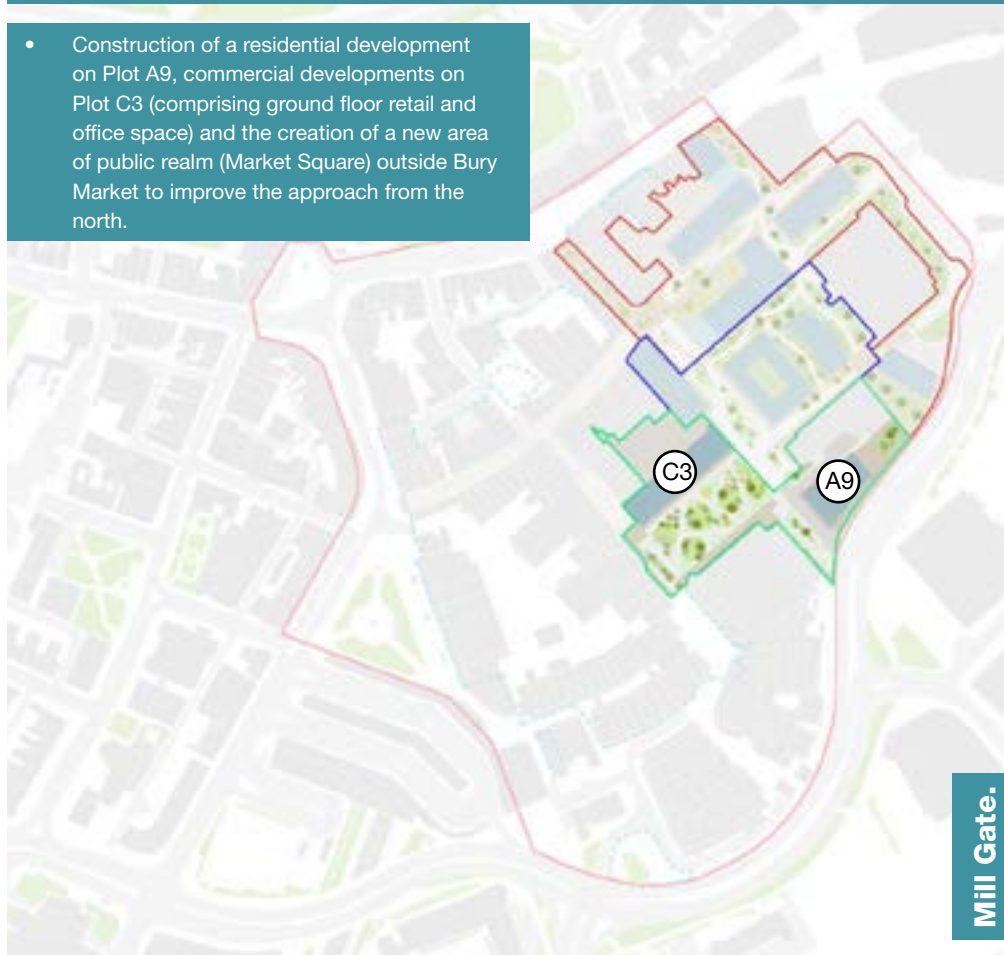
Mill Gate.

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;

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.

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.



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.

Mill Gate.

- Phase 1
- Phase 2
- Phase 3
- Phase 4
- Phase 5



7.4

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 ultimate 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.





Glossary.

8

8.1

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.

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Council



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Classification: Open	Decision Type: Non-Key
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Report to:	Cabinet	Date: 13 March 2024
Subject:	Gigg Lane Stadium	
Report of	Cabinet Member for Culture, Economy and Skills	

Summary

1. The Cabinet approved an investment of up to £450k in the Gigg Lane Stadium at its meeting on the 13th of July 2022. At this meeting Cabinet agreed the following -

It is recommended that subject to the successful outcome of the vote on the proposed merger by the members of Bury Football Club Supporters' Society Ltd ('BFCSS' previously 'Forever Bury') and Shakers Community Society Ltd ('Shakers'), that -

- Cabinet agree to commit £450k of funding to Bury Football Club Company Limited, to be used for the purpose outlined within the report.
 - The detailed terms of the commitment to be delegated to the Chief Executive and the Executive Director of Finance after consultation with the Leader and the Cabinet Member for Culture and the Economy, for approval.
 - The £450k recommended grant to be conditional on:
 - Satisfactory financial diligence on the business plan;
 - Evidence that the match funding from the private benefactors and balance of the grant from the Community Benefit Fund is available;
 - An agreed merger, following a successful outcome of voting by both the BFCSS and Shakers Community Benefit Societies, in line with the structure set out in Appendix 2; and
 - £450k to be deployed to fund the capital expenditure outlined in this report with the final costs to be determined through tender exercises.
2. The conditions set out above have not been met in full. This intention of this paper is to update the Cabinet, and to refresh the delegations. The reason for such an action is that there is a time pressure to secure a decision from the Council, the reason for which is outlined below.

Recommendation(s)

3. That the Council restates its intention to invest £450k of funding to Bury FC. Note that this sum would contribute towards the cost of installing a 3G pitch at Gigg Lane.
4. The detailed terms of the commitment and consideration of whether to become a co-signatory of the lease to be delegated to the Chief Executive and the Executive Director of Finance after consultation with the Leader and the

Cabinet Member for Culture and the Economy, for approval subject to the following conditions.

- The financial due-diligence demonstrates that the FSSB (the merged entity) represent a low-risk for an investment in a 3G pitch.
- That the FSSB complete the drawdown of their remaining grant funding from the Community Ownership fund administered by DLUH
- That the Council must agree to the terms of the lease between FSSB and Bury FC and shall be a co-signatory of the lease.
- That within six months of signing a grant funding agreement a community engagement plan will be agreed between the Council and the FSSB.

Reasons for recommendation(s)

5. The Council has strongly supported the merger of the two football societies. This is because it represents the only realistic route back to securing football league fixtures and to secure the associated economic benefit realised by hosting regular fixtures, often with more than 3,000 spectators.
6. It is important that Gigg Lane is a financially sustainable facility. It is a large stadium (especially for non-league football) with not insignificant costs associated with its upkeep. Meeting this cost burden is best achieved through active use of the Stadium outside of matchdays. It is possible to create significant new income streams through the installation of a 3G pitch, which so long it is of a specific standard, is allowed at Step 9 of the football pyramid (Bury's current position is in the Northwest Counties Football League) and leagues above.
7. There are strong economic benefits for the Borough associated with guaranteeing the future of the Gigg Lane facility and there are also additional benefits in providing floodlit 3G sports facilities in the Borough. The Council see this as an opportunity to develop a pioneering approach to working with a fan owned football club to develop real and meaningful community benefit.
8. For the Club it builds goodwill that will eventually translate into new supporters. Our ambition for Bury is to develop an exemplar of how a fan-owned club can drive real social benefit.
9. To achieve this objective, we will agree a comprehensive community engagement plan. This will be a multi-year endeavour. We are working with the Club on the final shape of the document and would intend to sign the agreement within three months of the Cabinet approval.
10. The following activities are indicative of what will be in the final document:
 - Proposals for concessionary use of the pitch by community groups;
 - The use of the venue to run motivational programmes targeted at young people not in work or education;

- Public health activities to encourage fitness and health, particularly in the local community;
 - Activities which help with tackling issues of isolation or loneliness in older cohorts;
 - An agreement to provide free tickets for matches on a to be agreed basis to groups such as care leavers, looked after children as well as local school children.
11. To oversee the delivery of a community benefit plan, it is proposed that the following governance arrangements are put in place:
- The establishment of a quarterly Community Board meeting, to involve key Council staff as well as representatives of the Bury VCFA and others on an ad-hoc basis;
 - The placement of a Bury Council representative on the Board of the merged community society (which manages the Stadium) to oversee the implementation of the plan;
 - An annual refresh of the community development plan

Alternative options considered and rejected

12. The Council has the option to 'do nothing'. This would mean the installation of the 3G pitch would likely not proceed. It would prove difficult for the Stadium to be developed without the income stream generated from a for-hire pitch. It also allows for a much-enhanced community engagement plan, as without the 3G pitch it would be difficult to meaningfully utilise the facility.

Report Author and Contact Details:

Name: Paul Lakin
Position: Executive Director (Place)
Department: BGI
E-mail: p.lakin@bury.gov.uk

Background

13. This paper is a refresh of the approval granted by Cabinet in July 2022. Since that time, it has become clear not all conditions for release of the funding have been met. It is also apparent that the Council will need to exercise a degree of control relating to the issuing of a lease, this is an issue which has arisen after the July 2022 council approval.
14. The Stadium was originally purchased by a combination of the Bury Football Supporters Society and a group of private individuals, the Founders. The public funding was provided by DLUH (Department of Levelling Up, Communities and Housing) through a community ownership funding grant.

15. Following the award of the community ownership grant an immediate challenge materialised, Bury Football Supporters Society owned the stadium, and a separate group, the Shakers Community Society, operated a football club, AFC Bury. The club had been established following the demise of Bury FC. They secured a position in the football pyramid and successfully established a football infrastructure from scratch. AFC Bury put in place a ground sharing agreement with Radcliffe FC to enable them to fulfil home fixtures.
16. In October 2022 the two societies fell short of the two-thirds majority required for a merger to proceed. This raised a possibility of an untenable position, with the possibility Bury Football Supporters Society might seek to establish their own separate football club in Bury. It is the view of most observers that the town cannot support two clubs, and a split fan base would mean no realistic prospect of a return to the football league.
17. The Council held a line that a merger was a prerequisite for a Council investment. The logic of this position is that the stadium would not warrant saving unless there is a single 'senior' football club playing as an anchor which enables additional community activity.
18. On the 5th of May 2023 the two societies voted to merge. The Football Supporters Society of Bury (the FSSB) were established and shortly thereafter had elections to the new Board. It should be noted whilst the societies merged the FSSB and the Bury FC football operation remain separate entities.
19. The successful merger allowed Bury FC (the name change from AFC was a part of the merger agreement) to open the 2023/24 season with a home fixture at Gigg Lane on the 29th of July 2023. Following the return to Gigg Lane crowd numbers have remained buoyant and the club look well positioning for a further promotion.
20. The FSSB have now approached the Council seeking to draw-down the £450k and match it to the remaining DLUCH tranche of funding, which is yet to be drawn, to install a 3G playing pitch at Gigg Lane. There is a very tight timescale for the installation of the pitch, as it will require the pitch to be installed and laid after the final home fixture of this season and ahead of the first home fixture of the 2024/25 season.
21. The Council is supportive of the installation of a 3G pitch at the Stadium, as it will have multiple sports, leisure and community benefits. It is recognised that if the timescale is not hit for the start of the 2024/25 season it will push back the installation by a year, denying the FSSB valuable income.

22. However, some of the key issues from the previous delegated approval have not been completed and there remain some challenging issues to resolve. The Council want to give the Club the opportunity to draw down the funding in time for the installation of the pitch and note some key decisions must be resolved for this to be possible.

23. These issues are:

- The Benefactors have indicated they will not make their final committed investment into the FSSB. This will leave the business plan with a potential funding gap. It needs to be established if the failure to secure this investment is material to the risk of part-funding the installation of a 3G pitch.
- The Council has received financial documentation from the FSSB. This needs to be examined to ensure that the organisation is sufficiently financially robust to enable the Council to be assured the 3G facility will be operational longer-term.
- The FSSB intends to offer a lease to Bury FC for its occupation of the Stadium. The lease will allow the football club to retain ticket receipts to fund its football operation and gives the Council assurance that a long-term tenant is in place to assure both ongoing use of the facility and funding to provide for upkeep of the Stadium.
- The issuance of the lease by the FSSB to Bury FC is key to unlocking the final tranche of funding from DLUCH. The department will want assurance that the Stadium will be used in line with the objective of the community ownership fund. To this end the Council will consider whether it shall agree to be a co-signatory of the lease, ensuring the society nor any of its subsidiaries could reassign or change the terms of the lease without council approval. A lease would also provide step-in rights for the Council if the business should fail.
- The Council will want to co-produce a community development strategy for the Gigg Lane facility and will, within six months of signing the funding agreement, shall expect the production of an agreed and joint strategy.

Links with the Corporate Priorities:

24. The aspirations to develop a comprehensive community plan is central to the objectives of 'Let's Do It'. This will promote the stadium as a facility central to the community which lives around Gigg Lane, which itself contains pockets of deprivation. The community activity described above has a strong fit to health, community engagement and training and development delivered in a neighbourhood.

Equality Impact and Considerations:

25. The Bury East community has a diverse population and suffers from high levels of deprivation. The previous owners of Gigg Lane did not make use of the facility to reach out and engage in their local community. This was both counter-productive for the club, as it meant that they were missing the opportunity to create a supporter-base in the heart of the neighbourhood from where they operated, and it represented a missed opportunity for a large facility to be used to provide genuine local community benefit.

Environmental Impact and Considerations:

26. The Gigg Lane Stadium is a large facility with a considerable amount of carbon embedded within the structure. The structures contain a lot of concrete and steel. The Club has the option, as it stabilises, to also consider other environmental investments, such as rain-water harvesting from the roof, and potentially the installation of solar to further enhance the environmental performance of the building.
27. Gigg Lane is also located within walking distance of the town centre. This means there is access to the Metrolink for supporters, which should reduce the number of car journeys. The stadium is also closely connected to the main north-south bus corridor. This contrasts to some of the out-of-town Stadiums constructed over the last 20-years which are often entirely car dependent.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
	The £450k grant is recommended under a number of conditions as set out in the report to safeguard the financial arrangements.

Legal Implications:

28. This report sets out the decision made by Cabinet in July 2022 wherein it was agreed to provide capital funding on the basis that several conditions were met. This report for consideration by Cabinet details that these conditions have not been met in full and the reasons for this. If Members are minded to agree to the release of the capital this would be on the basis of revised conditions being met. These revised conditions include a financial due diligence review of the pitch proposal, the final draw down of Government funding, lease arrangements and a community engagement plan. Legal advice and support will be provided to include a grant agreement.

Financial Implications:

29. The Capital programme includes £450,000 which has been set aside in the to fund the works.

Appendices:

None.

Background papers:

Cabinet report: July 2022 -

<https://councildecisions.bury.gov.uk/documents/s32188/Council%20investment%20in%20Gigg%20Lane%20Stadium.pdf>

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

Term	Meaning
FSSB	Football Supporters' Society of Bury
DLUCH	Department for Levelling Up, Housing and Communities
Bury FC	Bury Football Club

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Classification: Open	Decision Type: Non-Key
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Report to:	Cabinet	Date: 13 March 2024
Subject:	Appointments Update	
Report of	Cabinet Member for Corporate Affairs and HR	

Summary

This report sets out amendments to the appointments made at the Annual Meeting of the Council held on 24th May 2023.

Recommendation(s)

That:

1. Cabinet notes the appointments and amendments to appointments made since the Annual Meeting of Council as set out at paragraph 2; and
2. Council be recommended to appoint Councillor Noel Bayley as Deputy Mayor for the Civic year 2024/25.

Reasons for recommendation(s)

N/A

Alternative options considered and rejected

N/A

Report Author and Contact Details:

Name: Julie Gallagher

Position: Head of Democratic Services

E-mail: Julie.gallagher@bury.gov.uk

Background

1. At the Annual Meeting of the Council held on 24th May 2023 the Council resolved, in respect of the various appointments made at that meeting, that the Chief Executive, in consultation with the Leaders of the political groups on the Council, be authorised to determine any appointments to bodies which remain to be filled and any changes in appointments or any new appointments to be made during the 2023/2024 Municipal Year and that any such appointments be reported to the Cabinet for information.
2. Since that meeting, the following appointments and amendments to appointments have been made:-

Committees:

Audit Committee

- Councillor Donald Berry be appointed in place of Councillor Carol Birchmore.

Cabinet:

- Cabinet Member for Health & Adult Care – Councillor Tamoor Tariq
- Deputy Leader – Councillor Tamoor Tariq (Statutory Deputy)
- Councillor Boroda to become Deputy Cabinet Member for Health and Adult Care

By virtue of the Cabinet position:

- Locality Board – Councillor Tamoor Tariq
- Health and Wellbeing Board – Councillor Tamoor Tariq

Committees:

- Employment panel – Councillor Tamoor Tariq
- JCC Teachers – Councillor Tamoor Tariq
- Licensing Committee – Councillor Boroda

Outside Bodies:

- Integrated Care Partnership GM appointment – Councillor Tamoor Tariq
- Democratic Arrangements Forum – Councillor Tamoor Tariq to attend as Deputy Leader
- Persona (Shareholder panel) – Councillor Tamoor Tariq
- Local Government Association – General Assembly – Councillor Tamoor Tariq
- North West Local Authorities' Employers Organisation – Councillor Tamoor Tariq

Appointment of Deputy Mayor 2024/25

3. To confirm that Councillor Khalid Hussain was currently Deputy Mayor and therefore Mayor elect for the forthcoming year, and propose that Councillor Noel Bayley be appointed as Deputy Mayor.

Links with the Corporate Priorities:

N/A

Equality Impact and Considerations:

N/A

Environmental Impact and Considerations:

N/A

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
N/A	

Legal Implications:

Any changes in appointments subsequent to the Annual Council meeting are authorised to be determined by the Chief Executive in consultation with the Leaders of the political groups on the Council. These are reported to the Cabinet for information. The Deputy Mayor nomination will be formally approved by Council, following a recommendation from Cabinet.

Financial Implications:

There are no financial implications.

Background papers:

[Annual Appointments Report 2023/24](#)

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

Term	Meaning

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**MINUTES OF THE MEETING OF THE GREATER MANCHESTER COMBINED
AUTHORITY HELD ON FRIDAY 26TH JANUARY 2024 AT STOCKPORT TOWN
HALL**

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
Salford	City Mayor Paul Dennett
Stockport	Councillor Mark Hunter
Tameside	Councillor Ged Cooney
Trafford	Councillor Tom Ross

ALSO IN ATTENDANCE:

Bolton	Councillor Nadim Muslim
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OFFICERS IN ATTENDANCE:

Chief Executive Officer, GMCA & TfGM	Eamonn Boylan
GMCA Deputy Chief Executive	Andrew Lightfoot
GMCA Monitoring Officer	Gillian Duckworth
GMCA Treasurer	Steve Wilson
GMCA Director of Governance & Scrutiny	Julie Connor
Bolton	Sue Johnson
Bury	Lynne Ridsdale
Manchester	Carol Culley
Oldham	Harry Catherall
Rochdale	Mark Robinson
Salford	Tom Stannard

Stockport	Caroline Simpson
Tameside	Sandra Stewart
Trafford	Sarah Saleh
Wigan	Sonia Halliwell
Office of the GM Mayor	Kevin Lee
GMCA	Lee Teasdale
GMCA	Nicola Ward

GMCA 01/24 APOLOGIES

That apologies be received from Councillor David Molyneux (Wigan), Alison McKenzie-Folan (Wigan), Joanne Roney (Manchester), Sara Todd (Trafford) and Steve Rumbelow (Rochdale).

GMCA 02/24 CHAIRS ANNOUNCEMENTS AND URGENT BUSINESS

Andy Burnham, Mayor of Greater Manchester, opened with the sad news of the passing of Sir Tony Lloyd MP, recalling his many years of immeasurable public service in the region. Sir Tony had first been elected as a Trafford Councillor in 1979, before going on to serve as the MP for Stretford, Manchester Central and Rochdale. Additionally, he served as the first Police & Crime Commissioner for Greater Manchester and also served as the region's interim mayor, being a key architect in laying the foundations for what Greater Manchester had become today. Condolences were sent to Sir Tony's family, and his constituency staff at this time.

Those present reflected on their memories of Sir Tony. How he served in politics as 'the best of us' and had an unwavering ability to bring people together, both across the political sphere and within the communities he served, and how he supported others in growing their confidence with a sincere empathetic heartfelt and human touch often missing nowadays. It was commented that "if politics has a moral centre – it looks like Tony Lloyd".

Deputy Mayor Kate Green was invited to provide an update on the latest developments in concluding the Baird Review of women and girls in custody suites in Greater Manchester. The investigation process had now been completed and the

development of the final report had now begun. This would involve several stages including legal and due diligence checks, as well as sharing the findings with the relevant complainants. It was critical that they were made aware of what was going to be in the report in advance. Whilst a precise timeframe could not be placed upon this process – it was aimed to have the report published before the close of the current mayoral term.

The Mayor advised that National Holocaust Memorial Day would be taking place on Saturday 27th January with events taking place throughout the region's boroughs. It was advised that the GMCA had held a deeply moving event on Wednesday 24th January – with particular thanks expressed to Falinge Park High School students who were involved in this event.

RESOLVED /-

1. That tributes and reflections from members on the passing of Sir Tony Lloyd MP be noted and that condolences be sent to his family and constituency staff at this time.
2. That all who wished to leave their condolences on the passing of Sir Tony Lloyd MP be invited to do so via the [Rochdale Council](#) website.
3. That the Deputy Mayor's update on the progress of the Baird Review be received and noted.
4. That the events taking place throughout the region to mark Holocaust Memorial Day on 27th January be noted.

GMCA 03/24 DECLARATIONS OF INTEREST

RESOLVED /-

That there were no declarations of interest made in relation to any item on the agenda.

GMCA 04/24 MINUTES OF THE GMCA MEETING HELD ON 15 DECEMBER 2023

RESOLVED -/-

That the minutes of the GMCA meeting held on 15 December 2023 be approved as a correct record.

GMCA 05/24 MINUTES OF THE GREATER MANCHESTER STANDARDS COMMITTEE MEETING HELD ON 15 DECEMBER 2023

RESOLVED -/-

That the minutes of the Standards Committee meeting held on 15 December 2023 be approved.

GMCA 06/24 MINUTES OF THE GMCA OVERVIEW AND SCRUTINY COMMITTEE MEETINGS HELD ON 13 DECEMBER 2023

RESOLVED -/-

That the minutes of the GMCA Overview & Scrutiny Committee meetings held on 13 December 2023 be noted.

GMCA 07/24 MINUTES OF THE BEE NETWORK COMMITTEE MEEETING HELD ON 14 DECEMBER 2023

RESOLVED -/-

1. That the minutes of the Bee Network Committee meeting held on 14 December 2023 be noted.
2. That the commencement of the new regular weekly reports on Bee Network performance through social media channels be acknowledged.

**GMCA 08/24 MINUTES OF THE GMCA WASTE & RECYCLING COMMITTEE
MEETING HELD ON 17 JANUARY 2024**

RESOLVED -/

That the minutes of the Waste & Recycling Committee meeting held on 17 January 2024 be noted.

**GMCA 09/24 MINUTES OF THE GREATER MANCHESTER CLEAN AIR
ADMINISTRATION COMMITTEE MEETING HELD ON 20
DECEMBER 2023**

RESOLVED -/

That the minutes of the Clean Air Administration Committee meeting held on 20 December 2023 be noted.

GMCA 10/24 MAYORAL GENERAL BUDGET AND PRECEPT PROPOSALS

Andy Burnham, Mayor of Greater Manchester, presented a report setting out his proposals for the Mayoral General Budget and precept for 2024-25 for consideration by the members of the GMCA. Unique amongst Mayoral Combined Authorities, the proposals being made included a significant element for the Fire Service which had previously fallen to the GM Fire and Rescue Authority to determine.

It was advised that the police precept consultation process had just concluded and that the Mayor's request for a £13 annual increase would be considered by the GM Police, Fire & Crime Panel on Tuesday 30th January. The challenges faced in terms of police funding stemmed from a below inflation increase in funding received from the Home Office in late 2023, with the expectation that PCC's would seek an increased precept. This was similar to the situation faced in terms of fire funding, and hence why a £5 annual increase would be sought for the functions previously covered by the Fire & Rescue Authority.

It was fully understood that increasing precepts in a time when the cost-of-living-crisis was still very much active was a difficult thing to do and was not a decision taken lightly. Due to this, the Mayor would not seek an increase in the precept for other Mayoral general functions.

Councillor Nadim Muslim was invited to feed back the comments raised at the GM Overview & Scrutiny Committee on the proposals. The Committee fully understood the difficulties involved in the latest round of budget setting across the public sector and appreciated that the proposals made did show restraint and could be justified. The Committee did raise concerns about Home Office legislation reimplementing 28 day evictions and the potential impact on homelessness.

Members expressed continued concern about the lack of government funding into local authorities, and that the recent announcement of £600m extra national funding was a sticking plaster over an increasing crisis and did represent a long-term sustainable solution to the many issues being faced.

Members noted the impact of the increasing homelessness being seen across the region and welcomed the Mayor's continued commitment to A Bed Every Night. However, the increases seen in the need for temporary accommodation were reaching a point of severe unsustainability, with an increasing number of children having to be placed in these types of accommodation. It was considered vital that the Renters Reform Bill, issues around no-fault evictions and the local housing allowance uplift were resolved to begin to address this crisis.

RESOLVED /-

1. That approval be given to the Mayor's proposal to increase the Mayoral General Precept by £5 to £112.95 (for a Band D property) comprising of:
 - i. Functions previously covered by the Fire & Rescue Authority – Precept of £81.20 (£5 Increase).
 - ii. Other Mayoral general functions – Precept of £31.75 (no increase)

2. That the GMCA was given the opportunity to note and comment on:
 - i. The overall budget proposed for the Fire & Rescue Service.
 - ii. The use of the reserves to support the revenue and capital budgets, and the assessment by the Treasurer that the reserves as at March 2025 are adequate.
 - iii. The proposed Fire Service capital programme and proposals for funding.
 - iv. The medium-term financial position for the Fire and Rescue Service covered by the Mayoral precept.
3. That the GMCA was given the opportunity to note and comment on the detailed budget proposals for other mayoral functions.
4. That the GMCA was given the opportunity to note and comment on the use of reserves as set out in Paragraph 3.3 of the report.
5. That the process for submitting any written comments to the Mayor in line with the legal process and timetable described in this report be noted.
6. That it be noted that at the GMCA meeting on 9 February 2024 there will be an updated budget submitted, consistent with the precept proposals, to reflect final tax base and collection fund calculations and the final baseline funding settlement.
7. That the comments raised by the Chair of the GMCA Overview & Scrutiny Committee be received and noted.
8. That the challenges presented by the below inflation increase in home office funding for both police and fire be noted.
9. That concerns that the current government funding package offered does not represent a long-term solution to the many issues faced within local authorities be noted.

GMCA 11/24 VISION ZERO STRATEGY

Andy Burnham, Mayor of Greater Manchester, presented a report containing the draft strategy for Vision Zero including the key features and targets for 2040. The report underlined the current picture, highlighting the key aims and objectives of the strategy, and sought to gain approval of the draft from members.

The Mayor also highlighted the changes seen in Greater Manchester Police's addressing of road safety issues over the past few years – with an increase in the number of new speed cameras and a much more visible presence on the region's roads. 852 people were killed or seriously injured on the roads of GM in 2022 (64 of which were deaths) and this was an unacceptably high number.

It was important to be clear that this was not an 'anti-motorist' strategy as some may look to perceive it – if the strategy was to be successful it would not only make all forms of transport safer – it would also help ensure that traffic also flowed better for all users, including motorists. The strategy was "not anti-car, but pro-road safety".

Councillor Nadim Muslim was invited to feed back the views of the GM Overview and Scrutiny Committee. It was advised that the Committee fully agreed that there was a need for this strategy and that every one road death in GM was one too many. The Committee hoped that the acceleration of this work could take place as soon as practicably possible. The Committee expressed concern that speed cameras could only be installed after a series of road deaths in a location and hoped that GM could begin to use its own criteria. It was also noted that speed and traffic calming measures that worked in some locations were not applicable to every location and that local knowledge should be used in adopting the best approach.

Members sought assurances that the strategy would be taken to individual authorities to be considered by their own scrutiny functions to ensure wider member engagement. It was advised that the strategy was deliberately broad rather than prescriptive at this stage so that stakeholders and the public could take part in shaping a final strategy that works best for the region. A detailed action plan would be drawn up that would include significant engagement with elected members ahead of the wider consultation.

RESOLVED /-

1. That the comments on the content of the draft strategy be noted.

2. That the draft Vision Zero Strategy and the commencement of a period of engagement with stakeholders and the public be approved.
3. That it be noted that a supporting Action Plan will be developed and brought to the GMCA following the period of stakeholder and public engagement on the strategy.
4. That the comments raised by the Chair of the GMCA Overview & Scrutiny Committee be received and noted.

GMCA 12/24 GREATER MANCHESTER INVESTMENT PLAN

Councillor Bev Craig, Portfolio Lead for Economy, Business and Inclusive Growth presented a report detailing the contents of the Investment Plan which related to the investment approach to support inclusive growth across Greater Manchester, including the things that needed to be done to drive inclusive growth in GMs key sectors and 10 Local Authorities over the next 10-15 years.

RESOLVED -/

1. That the Investment Plan set out in this document and the receiving of periodic updates be approved.
2. That the Investment Milestones as set out in Annex 1 be agreed.
3. That the Investment Principles set out in Annex 2 be agreed.
4. That the boundaries proposed for the GM Investment Zones and GM Growth Zones as set out in Annex 3 be approved.

**GMCA 13/24 GREATER MANCHESTER BROWNFIELD PROGRAMME –
YEAR 2 & 3 METHODOLOGY AND ALLOCATIONS**

Councillor Ged Cooney, Portfolio Lead for Housing presented a report seeking approval for the allocation of the remaining £115m from the three year £150m Brownfield programme that is part of the 2023 Devolution Deal. The allocation had been determined by the methodology set out within the paper.

It was advised that work was taking place to ensure that of the minimum 7000 homes hoped to be built by 2025/26, at least 25% would be available as genuinely affordable homes at social rent levels and there would also be a significant focus on the continued provision of net zero/additional environmental benefits.

It was agreed that the pace at which the region was able to deliver on the development of brownfield sites was exemplary and a true embodiment of the vision of levelling up. With this in mind, the Mayor and Councillor Cooney would write to the government to make clear how successful the region was at delivery in this area, and that further funding would conclusively deliver the outputs sought by government at a pace beyond that seen in the rest of the country.

RESOLVED /-

1. That approval be given to the methodology for prioritising schemes in Year 2 and Year 3 of the Brownfield programme, as set out in Section 2 and Appendix 1.
2. That approval be given to the allocation of the remaining £115m of the overall £150m funding devolved to GMCA.
3. That approval be given to the utilisation of up to £500k from Brownfield grant overage payments to contribute to the revenue funding requirements of delivering the programme.
4. That authority be delegated to the GMCA Treasurer, acting in consultation with the GMCA Monitoring Officer, to effect the necessary legal agreements

for the individual grants between the GMCA and grant recipients, as set out in Appendix 2.

5. That Mayor Burnham and Councillor Cooney will write to government to update on its strength and ability to deliver on brownfield projects, and that further funding would deliver the outputs sought by government at a pace beyond the rest of the country.

GMCA 14/24 GREATER MANCHESTER HOUSING INVESTMENT RECOMMENDATIONS

Councillor Ged Cooney, Portfolio Lead for Housing, presented a report seeking approval to the GM Housing Investment Loans Fund loan detailed in the recommendation below.

The loans and equity investments would deliver the development of 41 apartments and 19 townhouses on the site of the former Probation Centre in Victoria Park, Manchester, and the loan would support a SME developer to bring forward the redevelopment of a brownfield site, with a Section 106 agreement in place for 12 of the new homes to go forward for discounted market sale at a discount of at least 20% and ringfenced for sale to key workers or those on low incomes.

RESOLVED /-

1. That approval be given to GM Housing Investment Loans Fund loan detailed in the table below, as detailed further in this and the accompanying Part B report;

BORROWER	SCHEME	DISTRICT	LOAN
Britannia Victoria Ltd	Victoria Park Probation Centre	Manchester	£9.632m

2. That authority be delegated to the GMCA Treasurer acting in conjunction with the GMCA Monitoring Officer to prepare and effect the necessary legal agreements.

GMCA 15/24 GREATER MANCHESTER INVESTMENT FRAMEWORK

Eamonn Boylan, Chief Executive Officer GMCA & TfGM, presented a report seeking approval for a loan to HM Pasties Ltd – a company that worked closely with ex-offenders to help bring them into employment. The loan would be made from recycled funds and would fund expansion at a new larger location.

RESOLVED /-

1. That approval be given for a loan of up to £300,000 to HM Pasties Ltd.
2. That authority be delegated to the Combined Authority Treasurer and Combined Authority 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 16/24 TFGM SENIOR APPOINTMENTS

Eamonn Boylan, Chief Executive Officer GMCA & TfGM presented a report seeking approval to recruit to the role of Chief Network Officer, TfGM, which will be a member of the Executive of TfGM; and to appoint to the role of TfGM Managing Director, on an interim basis, in line with the proposals agreed by the GMCA Resources Committee in relation to the recruitment of a Group Chief Executive Officer (CEO) for GMCA.

RESOLVED /-

1. That the disestablishment of the role of TfGM Chief Operating Officer and the creation of and recruitment to a new role of TfGM Chief Network Officer be noted and approved.
2. That authorisation be given to the commencement of a recruitment process of the TfGM Chief Network Officer.

3. That approval be given to the use of a recruitment executive search agency to provide independent support to the process.
4. That approval be given to the appointment of Steve Warrener as Interim Managing Director, in addition to his substantive role of Finance and Corporate Services Director, pending further discussions with the incoming Group CEO.
5. That approval be given to the appointment of the role of Chief Network Officer as a member of the TfGM Executive to replace the Chief Operating Officer and retain the Finance and Corporate Services Director as a member of TfGM Executive in the renamed joint role of Interim Managing Director/Finance and Corporate Services Director.
6. That it be noted that the Director General has been consulted on the content of this report.

GMCA 17/24 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 18/24 GREATER MANCHESTER HOUSING INVESTMENT
RECOMMENDATION**

Clerk's Note: This item was considered in support of the report considered in Part A of the agenda (minute 14/24)

RESOLVED /-

That the report be noted.

GMCA 19/24 GREATER MANCHESTER INVESTMENT FRAMEWORK

Clerk's Note: This item was considered in support of the report considered in Part A of the agenda (minute 15/24).

RESOLVED /-

That the report be noted.

**MINUTES OF THE MEETING OF THE GREATER MANCHESTER COMBINED
AUTHORITY HELD ON FRIDAY 9TH FEBRUARY 2024 AT TRAFFORD TOWN
HALL**

PRESENT:

GM Mayor	Andy Burnham (in the Chair)
GM Deputy Mayor	Kate Green
Bury	Councillor Eamonn O'Brien
Manchester	Councillor Bev Craig
Oldham	Councillor Arooj Shah
Rochdale	Councillor Neil Emmott
Salford	Councillor Tracy Kelly
Stockport	Councillor Mark Hunter
Tameside	Councillor Gerald Cooney
Trafford	Councillor Tom Ross
Wigan	Councillor David Molyneux

ALSO IN ATTENDANCE:

Chair of GMCA Overview & Scrutiny	Cllr Nadim Muslim
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OFFICERS IN ATTENDANCE:

Chief Executive Officer, GMCA & TfGM	Eamonn Boylan
GMCA Deputy Chief Executive	Andrew Lightfoot
GMCA Deputy Monitoring Officer	Gwynne Williams
Deputy Monitoring Officer	Melinda Edwards
GMCA Treasurer	Steve Wilson

Bolton	Sue Johnson
Bury	Lynne Ridsdale
Manchester	James Binks
Oldham	Harry Catherall
Rochdale	Steve Rumbelow
	Julie Murphy
Salford	Tom Stannard
Stockport	Caroline Simpson
Tameside	Sandra Stewart
Trafford	Sarah Saleh
Wigan	Alison McKenzie-Folan
Deputy Chief Fire Officer, GMFRS	Ben Norman
Managing Director, TfGM	Steve Warrener
Office of the GM Mayor	Kevin Lee
GMCA	Julie Connor
GMCA	Sylvia Welsh
GMCA	Lee Teasdale

GMCA 20/24 APOLOGIES

RESOLVED /-

That apologies be received and noted from City Mayor Paul Dennett (Salford), Councillor Nicholas Peel (Bolton), Joanne Roney (Manchester) & Sara Todd (Trafford).

GMCA 21/24

CHAIRS ANNOUNCEMENTS AND URGENT BUSINESS

The Mayor of Greater Manchester, Andy Burnham, opened by expressing the best wishes of the region, and hopes for a speedy recovery, to King Charles following the recent announcement of his cancer diagnosis.

The Mayor advised that a meeting of the GM Police, Fire & Crime Panel had taken place on 30th January, at which his request to increase the police precept by £13 per year for a Band D property (£10.11 for Band B) had been unanimously approved and would therefore commence from 1st April 2024.

The Mayor, together with Councillor Tom Ross, expressed their concerns following the announcement that Kellogg's would be undertaking a review of operations at its Trafford premises with possible closure of the site being one of the review considerations. The GMCA and its partners were on standby to provide support to Kellogg's employees should the consultation result in closure. There would also be close engagement throughout the whole consultation process as any closure would impact not just Trafford but the whole region.

RESOLVED -/

1. That the GMCA record its best wishes to His Royal Highness, King Charles, for a speedy recovery from his recent cancer diagnosis.
2. That it be noted that the GM Police Fire & Crime Panel, at its meeting on 30th January 2024 unanimously agreed the Mayor's request to increase the police precept by £13 per year for a band D property (£10.11 for a Band B property) with effect from 1 April 2024.
3. That the concerns raised by the Mayor of Greater Manchester, Andy Burnham and Councillor Tom Ross in relation to the review of the current Kellogg's premises within the Trafford borough be noted, and that the GMCA and partners would closely engage with Kellogg's throughout the full review period.

GMCA 22/24 DECLARATIONS OF INTEREST

RESOLVED -/

There were no declarations of interests received.

**GMCA 23/24 MINUTES OF THE GMCA MEETING HELD ON 26 JANUARY
2024**

RESOLVED -/

That the minutes of the GMCA meeting held on 26 January 2024 be approved.

**GMCA 24/24 MINUTES OF THE GMCA RESOURCES COMMITTEE HELD
ON 26 JANUARY 2024**

RESOLVED -/

That the proceedings of the Resources Committee meeting held on 26 January 2024 be approved.

**GMCA 25/24 MINUTES OF THE GMCA AUDIT COMMITTEE HELD ON 24
JANUARY 2024**

RESOLVED -/

That the proceedings of the Audit Committee meeting held on 24 January 2024 be noted.

**GMCA 26/24 MINUTES OF THE GMCA OVERVIEW & SCRUTINY
COMMITTEE HELD ON 24 JANUARY 2024**

RESOLVED -/

That the proceedings of the Overview & Scrutiny Committee meeting held on 24 January 2024 be noted.

GMCA 27/24 BUDGET REPORTS

GMCA Revenue and Capital Budgets 2024/5 Overview

Councillor David Molyneux, Portfolio Lead for Resources, was invited to introduce the overarching report on the GMCA budget proposals for 2024/25. The report summarised the position on the Mayoral General Budget and Precept Proposals, The GMCA General Budget, GMCA Transport budgets including Transport Levy and Statutory Charge and the GM Waste Services Levy. It also set out the implications of the proposed budgets and the resultant charges on districts and the Mayoral Precept.

The GMCA recorded its thanks to GM Treasurers, GMCA Treasurer Steve Wilson and Deputy Treasurer, Rachel Rosewell, and the GMCA finance team for the significant work put into managing the overall budget process.

Steve Wilson was invited to comment, expressing his thanks to the local authority treasurers of the ten Greater Manchester authorities who supported his team throughout the budget setting process. It was highlighted that this year had seen a particular focus on ensuring that extra cost pressures were not passed on to residents through the form of levies or council tax precepts wherever possible.

RESOLVED -/-

That the contents of the summary report be noted.

A. Mayoral General Budget & Precept Proposals 2024/25

Councillor Bev Craig, GMCA Deputy Mayor, took the Chair for this item of business.

The report sought approval for the Mayoral General Precept for 2024/25 and recommended the setting of the Revenue Budget for 2024/25 as required under section 42A of the Local Government Finance Act 1992 (updated in the Localism Act 2011) and the precepts and relevant levels of Council Tax required under sections 40, 42B and 47 of the Act.

Cllr Nadim Muslim, Chair of the GMCA Overview & Scrutiny Committee was invited to report back on the Committee's discussion of the budget and proposals. He advised that the Committee Members had recognised the importance of Our Pass and A Bed

Every Night, and they were reassured that the use of reserves to fund these was related to phasing of funding across financial years. Members also recognised the difficulty of financial forecasting for the franchising of the bus network when two tranches were still to commence, however they were still keen to keep a watching brief over performance as the risk re-profiled over the coming year. The Committee had also offered to take a closer look at the Housing Investment Fund; and would welcome to opportunity to look closer at how the GM element of the Business Rate Retention Scheme for 2024/25 would be allocated.

The Mayor of Greater Manchester, Andy Burnham, was invited to comment on his budget and proposals. He stated that the budget proposals had been prepared with a full knowledge of the household pressures still being felt acutely across the region – and due to this a freeze was proposed in terms of the Mayoral General Budget. Within this the prudent use of reserves would allow for the current offer within the Mayoral General Budget to be retained over the coming financial year.

In relation to the Fire Budget, it was advised that following the Fire Review, it was acknowledged that to meet the increasing needs of a vibrant and growing city region, there was a need not only to stop the cuts seen in the 2010s, but to actively reverse this trend. The proposal made was a £5 per year increase that would allow for a permanent fleet of 52 pumps around the city region. This was also necessary due to a below inflation increase seen in the fire grant received from central government this year.

The meeting was advised that a named vote was required to approve the proposals for The GM Mayoral General Budget. Members voted on the recommendations as follows:

District	GMCA Member	
Bury	Cllr Eamonn O'Brien	Agreed
Manchester	Cllr Bev Craig	Agreed
Oldham	Cllr Arooj Shah	Agreed
Rochdale	Cllr Neil Emmott	Agreed
Salford	Cllr Tracy Kelly	Agreed

Stockport	Cllr Mark Hunter	Agreed
Tameside	Cllr Ged Cooney	Agreed
Trafford	Cllr Tom Ross	Agreed
Wigan	Cllr David Molyneux	Agreed

RESOLVED /-

1. That the Mayor's General budget for 2024/25, as set out in this report together with the calculation of the precepts and Council Tax rates set out in Appendix 2, be approved.
2. That the Mayoral General Precept to £112.95 (Band D) comprising of £81.20 for functions previously covered by the Fire and Rescue Authority precept and £31.75 for other Mayoral General functions be approved.
3. That the following be approved:
 - i. the overall budget for the Fire and Rescue Service for 2024/25 covered by the Mayoral precept.
 - ii. the medium-term financial position for the Fire and Rescue Service.
4. That approval be given to the use of reserves, as set out in section 3 of the report, and the assessment by the Treasurer that the reserves as at March 2025 were adequate.
5. That it be noted that in accordance with legal requirements, the minutes will record the names of those Members voting for or against the Mayor's budget and precept proposals.

6. That the feedback from the GMCA Overview and Scrutiny Committee be received and noted.

Mayor of Greater Manchester, Andy Burnham retook the Chair from this point in the meeting.

B. GMCA Transport Revenue Budget 2024/25

Steve Wilson, GMCA Treasurer, advised that there were a number of unique challenges set against the transport revenue budget, given this was a transitional year, being in the process of moving from a deregulated service towards a regulated service covering the whole city region. Issues still remained around the recovery of patronage following the COVID pandemic and heightened energy costs. However, a balanced budget had still been achieved, partly in thanks to the Financial Sustainability Plan that had been worked to over the course of the year.

RESOLVED /-

1. That the risks and issues which were affecting the 2024/25 transport budgets, as detailed in the report, be noted.
2. That the GMCA budget relating to transport functions funded through the Levy, as set out in this report, for 2024/25 be approved.
3. That a Transport Levy on the District Councils in 2024/25 of £119.473m, apportioned on the basis of mid-year population 2022, be approved.
4. That a Statutory Charge of £86.7m to District Councils in 2024/25, as set out in Part 4 of the Transport Order, apportioned on the basis of mid-year population 2022, be approved.
5. That the proposal to increase fees and charges, as noted in the report, including the increases proposed Departure Charges and Bus stop closure charges, as set out in paragraphs 4.24 and 4.25, be endorsed.

6. That the use of Transport reserves in 2023/24 and 2024/25, as detailed in section, be approved.

C. GMCA Revenue General Budget 2024/25

The Levy to councils would remain unchanged. This was a budget area that exemplified the complexities around Government grant funding that would hopefully be improved once transition to the single settlement had completed. It had been agreed that inflationary pressures would be absorbed within the GMCA and not passed onto local authorities.

RESOLVED -/

1. That the budget relating to the Greater Manchester Combined Authority functions, excluding transport and waste in 2024/25, as set out in section 2 of the report, be approved.
2. That District contributions of £8.5 million, as set out in section 5 of the report, be approved.
3. That the use of reserves, as set out in section 6 of the report, be approved.

D. GM Waste Budget and Resources - Budget and Levy 2024/25 and Medium Term Financial Plan to 2023/24 - 2025/26

In setting the levy, significant efforts had been made to mitigate the pressures faced within these services. Mitigation had been managed through a reduction in tonnage coming through household waste recycling centres and an increased level of income through recycling of paper & card. This did allow, with a small amount of reserve usage, to offset some of the inflationary pressures with an average levy increase of 3.1% - a significant reduction on the headline 6.6% - though this did vary from authority to authority.

In addition to the mitigation, the reserves position had been reviewed, which had resulted in the GMCA being able to return £20m to local authorities during Quarter 1 of 2024/25.

Members recorded their thanks for the work undertaken by the Finance Team that had allowed for the return of funds into local authority budgets.

RESOLVED /-

1. That the proposed 2025/26 Trade Waste rate of £138.93, to allow forward planning by Greater Manchester Local Authorities, be approved.
2. That the budget and levy for 2024/25 of £174.3m (3.1% increase) be approved.
3. That a one-off reduction of £20m to the levy in 2024/25, funded from reserves reducing the 2024/25 requirement to £154.3m be approved and that authority be delegated to the GMCA Treasurer to agree the basis of distribution with Greater Manchester Local Authority Treasurers.

1. That the risk position set out in the Balances Strategy and Reserves be noted.
2. That Members welcome the work undertaken by the Finance Team that has allowed for the return of funds into local authority budgets.

E. GMCA Capital Programme -2023/24 - 2026/7

These figures now included an update on 2023/24 alongside the proposed budget for 2024/25. Of the £685.2m capital programme budget, £118m would be funded through borrowing and the revenue costs of that would be picked up by the relevant budgets. The large majority of the funding however was either through grants being received or reserves related to grants received in previous years.

RESOLVED /-

1. That the current 2023/24 forecast of £579.1m compared to the 2023/24 previous forecast of £623.6m be noted and that changes to the capital programme, as set out in the report and Appendix A, be approved.
2. That the capital programme budget for 2024/25 of £685.2m and the forward plan for future years, as set out in the report and Appendix A, be approved.
3. That the addition to, and the subsequent drawdown from, the 2023/24 capital programme of £4.4m for local highways maintenance activities, as outlined in section 3.9.4 of this report, be approved.
4. That the inclusion of Trailblazer funding, as outlined in section 4.14 of the report, be approved.

GMCA 28/24 GMCA REVENUE UPDATE – QUARTER 3 2023/24

Councillor David Molyneux, Portfolio Lead for Resources, presented a report informing the GMCA of the 2023/24 financial position at the end of December 2023 (quarter 3) and the forecast revenue outturn position for the 2023/24 financial year.

RESOLVED /-

1. That the 2023/24 forecast outturn position for the GMCA budgets at the end of December 2023 (quarter 3) be noted.
2. That the return of the forecast in year underspend of £10m from the Waste & resources budget be approved.

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By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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