

# AGENDA FOR CABINET



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**To: All Members of Cabinet**

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

Dear Member/Colleague

## **Cabinet**

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

<b>Date:</b>	Wednesday, 17 April 2024
<b>Place:</b>	Bury Town Hall
<b>Time:</b>	6.00 pm
<b>Briefing Facilities:</b>	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.
<b>Notes:</b>	

## **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, 15<sup>th</sup> April 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 12<sup>th</sup> April 2024.

### **5 MINUTES *(Pages 5 - 14)***

Minutes from the meeting held on 13<sup>th</sup> March 2024 are attached.

### **6 REVIEW OF NEIGHBOURHOOD HOUSING SUPPORT SERVICES- COMPLEX NEEDS AND FLOATING SUPPORT/DISPERSED ACCOMMODATION SERVICES *(Pages 15 - 22)***

Report of the Cabinet Member for Health and Adult Care is attached.

### **7 HOME TO SCHOOL TRAVEL ASSISTANCE AND TRANSPORT POLICY *(Pages 23 - 118)***

Report of the Cabinet Member for Children and Young People is attached.

### **8 CORPORATE PLAN 2024/25 *(Pages 119 - 132)***

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

### **9 LOCAL GOVERNMENT ASSOCIATION CORPORATE PEER REVIEW *(Pages 133 - 196)***

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

### **10 RENEWAL OF THE COUNCIL'S HR & PAYROLL MANAGEMENT SYSTEM CONTRACT - PART A *(Pages 197 - 204)***

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

**11 CONSTITUTION UPDATE** *(Pages 205 - 210)*

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

**12 MINUTES OF ASSOCIATION OF GREATER MANCHESTER  
AUTHORITIES / GREATER MANCHESTER COMBINED AUTHORITY**  
*(Pages 211 - 224)*

To consider the minutes of meeting of the Greater Manchester Combined Authority held on 23<sup>rd</sup> February 2024.

**13 URGENT BUSINESS**

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

**14 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.

**15 RENEWAL OF THE COUNCIL'S HR & PAYROLL MANAGEMENT SYSTEM  
CONTRACT - PART B** *(Pages 225 - 230)*

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

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**Minutes of:** CABINET

**Date of Meeting:** 13 March 2024

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

**Also in attendance:** Councillors R Bernstein and M Smith

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

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**CA.133 APOLOGIES FOR ABSENCE**

There were no apologies received.

**CA.134 DECLARATIONS OF INTEREST**

There were no declarations of interest.

**CA.135 PUBLIC QUESTION TIME**

There were no public questions.

**CA.136 MEMBER QUESTION TIME**

There were no Member questions.

**CA.137 MINUTES**

**It was agreed:**

That the minutes of the meeting held on 14 February 2024 be approved as a correct record.

**CA.138 ADULT SOCIAL CARE PROVIDER FEE UPLIFTS 2024/25**

Councillor Tamoor Tariq was welcomed back to Cabinet, and thanks were extended to Councillor Nathan Boroda for stepping up to the Cabinet Member role for the previous months.

Councillor Tamoor Tariq, Cabinet Member for Health and Adult Care, presented the report which detailed 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. It was noted that for each provider sector the Council was proposing uplifting the staffing element of the fee by 10% in line with the increase in the Real Living Wage and National Living Wage, and proposals had been developed alongside provider partners.

**Decision:**

Cabinet agreed the fee uplifts as set out in the report.

**Reasons for the decision:**

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.

**Other options considered and rejected:**

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

**CA.139 ANNUAL REVIEW OF ADULT SOCIAL CARE FEES AND CHARGES FOR THE FINANCIAL YEAR 2024/25**

Councillor Tamoor Tariq, Cabinet Member for Health and Adult Care, presented the report which detailed the proposed 2024/25 Adult Social Care fees and charges across the directorate to take effect in April 2024. It was noted that all adult social care is means tested and charges are only paid by people who have assets or income above the thresholds set by government.

**Decision:**

Cabinet approved the proposed Adult Social Care Fees & Charges for 2024/25 as set out in the report.

**Reasons for the decision:**

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

**Other options considered and rejected:**

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%.

**CA.140 ADULT SOCIAL CARE PERFORMANCE QUARTER THREE REPORT 2023/24**

Councillor Tamoor Tariq, Cabinet Member for Health and Adult Care, presented the report which outlined delivery of the Adult Social Care Strategic Plan, preparation for the new CQC Assessment regime for local authorities, and provided an illustration and report on the department's performance framework. In response to Member questions, Councillor Tariq provided assurance around the Council's preparedness for the CQC inspection, advising that work had been underway addressing specific issues raised at the LGA Peer Review last year including reviewing processes and increasing transparency. Thanks were extended to officers for their ongoing hard work in improving the service and getting Bury to a position of growing strength.

**Decision:**

Cabinet noted the report.

**Reasons for the decision:**

N/A

**Other options considered and rejected:**

N/A

**CA.141 PROPOSED REVIEW OF THE PERSONA SHAREHOLDER AGREEMENT**

Councillor Tamoor Tariq, Cabinet Member for Health and Adult Care, presented the report which proposed a review of the Persona Shareholder agreement to 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. In response to a Member's question, it was noted that the review was anticipated to take 3-4 months.

**Decision:**

Cabinet agreed to review the Persona Shareholder Agreement and report back with recommendations at a later date.

**Reasons for the decision:**

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.

**Other options considered and rejected:**

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.

**CA.142 EXPANSION OF SOLAR PV ON COUNCIL ASSETS**

This item was withdrawn from the agenda.

**CA.143 QUARTER 3 BUDGET MONITORING REPORT**

Councillor Richard Gold, Cabinet Member for Finance and Communities, presented the report which outlined 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 provided 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 set out the position for both revenue and capital and provides an analysis of the variances, both under and overspending.

Members discussed the paper and in response to questions it was noted that the Project Safety Valve (PSV) had been accepted by the Government but there were still targets for the Council to meet to stay on track. Councillor Lucy Smith advised that PSV discussions had been challenging but, now agreement had been reached, the Council could push forward with transformation plans to meet need while addressing financial controls. It was noted that PSV could come to a future scrutiny meeting for consideration.

With regards to a query regarding crossing patrols, it was noted that the overspend were most likely caused by staffing sickness and absence but specific data would be

shared with Councillor Bernstein after the meeting. In response to a question regarding "SOBC" figures in the report, it was noted that this referred to a Strategic Outline Business Case and would relate to monies drawn down for feasibility studies and design work, but specific detail regarding the £1.83m figure could be shared with Councillor Mike Smith after the meeting.

Finally, it was noted that the £1.8m overspend in Operations budgets was a reflection of rising energy costs being absorbed by the directorate, and budget planning for the coming year was taking place later in the month starting from a zero budget position.

**Decision:**

Cabinet:

1. Noted 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;
2. Noted the slight improvement in £18.555m deficit on the Dedicated Schools Grant (DSG) and the ongoing activity within the Project Safety Valve project (PSV); and
3. Noted 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 the decision:**

To update Members on the Council's budgetary position and ensure the Council's budgetary targets are achieved.

**Other options considered and rejected:**

None. This report is in accordance with the Council's financial procedure regulations.

**CA.144 PROPOSED REDEVELOPMENT OF THE ELMS FOR THE DELIVERY OF ACCOMMODATION FOR OLDER PEOPLE**

Councillor Clare Cummins, Cabinet Member for Housing Services, presented the report which sought 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. Councillor Cummins confirmed that commissioning partners had been fully involved, and thanked the Adult Social Care and Housing teams for their effective co-working. Councillors praised the scheme, welcoming the disposal of the old site and the proposed new facility.

**Decision:**

Cabinet:

1. Approved 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; and
2. Requested a report back to Cabinet on the offers received with a recommendation as to the preferred bidder.

**Reasons for the decision:**

- To facilitate the Councils 'brownfield first' approach to housing delivery and reduce revenue costs for holding, maintaining and securing long-term disused sites.
- The delivery of much needed, affordable homes for older people to reduce the need for more costly interventions and relieve pressures on housing waiting lists.
- Considerable benefits in health and community care with substantial savings on out of borough placements and the Council's adult social care budgets.
- Creation wider social, environmental, and financial benefits including additional council tax revenue and the potential to generate a capital receipt.

**Other options considered and rejected:**

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

#### **CA.145      PROCUREMENT OF WATER HYGIENE MONITORING SERVICES FOR THE PREVENTION OF LEGIONELLA AWARD RECOMMENDATION - PART A**

Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs and HR, presented the report which sought 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.

**Decision:**

Cabinet approved 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.

**Reasons for the decision:**

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.

**Other options considered and rejected:**

- 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.
- 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.

#### **CA.146 ADOPTION OF MILL GATE REGENERATION FRAMEWORK**

Councillor Eamonn O'Brien, Leader and Cabinet Member for Strategic Growth, presented the report which proposed the adoption of the revised regeneration framework following a period of public and stakeholder consultation, to establish the long-term vision for the future development of the Mill Gate estate. With regards to next steps, the Leader advised that the revised framework would be adopted by the JV Board and reported to the Town Centre Advisory Panel before delivery timescales were finalised regarding mobilisation of possible interventions around other work underway in the area (e.g. flexi hall and the interchange).

##### **Decision:**

Cabinet approved the adoption of the Mill Gate Regeneration Framework.

##### **Reasons for the decision:**

- The regeneration framework is a vital component of delivering the Bury Town Centre Masterplan.
- 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
- The regeneration framework provides a clear long-term vision for redevelopment of the Mill Gate estate.
- 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.

##### **Other options considered and rejected:**

N/A

#### **CA.147 GIGG LANE STADIUM**

Councillor Charlotte Morris, Cabinet Member for Culture, Economy and Skills, presented the report which update the Cabinet on a previous decision to approve an investment of up to £450k in the Gigg Lane Stadium at its meeting on the 13th of July 2022, and to refresh the delegations for that decision which would enable the installation of a 3G pitch.

Jacqui Dennis, Director of Law and Democratic Services, advised that the wording of the recommendations had changed since the report was published, and advised on the new wording which removed the condition for a lease to be in place providing

sustainability and longevity was secured. This allowed for greater flexibility for the stadium and the Club and would still enable the security of the grant agreement.

Members discussed the report, noting the huge opportunity for community benefit and the continued support from the Council in the development of the stadium and the Club. In response to a question regarding the benefactors, it was noted that they had made significant financial contribution thus far, and financial due diligence undertaken still gave confidence in the Council's investment for the pitch. With regards to the timescales involved, these were for the Club to manage but they were aiming to have the pitch installed over summer to be in place for the next season.

### **Decision:**

Cabinet:

1. Agreed that the Council restates its intention to invest £450k of grant funding to Bury FC. (Noted that this sum would contribute towards the cost of installing a 3G pitch at Gigg Lane.)
2. Agreed a delegation to the Chief Executive, Director of Finance, and Monitoring Officer following consultation with the Leader and the Cabinet Member for Culture, Economy and Skills to enter into a grant agreement, 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 DLUCH
3. Noted that within six months of entering in to the grant agreements, a community engagement plan will be agreed between the Council and FSSB.

### **Reasons for the decision:**

- 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.
- 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.
- 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.
- 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.

### **Other options considered and rejected:**

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.

**CA.148 APPOINTMENTS UPDATE**

Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs and HR, presented the report which sets out amendments to the appointments made at the Annual Meeting of the Council held on 24th May 2023 and the proposal for Councillor Noel Bayley to be appointed as Deputy Mayor for the Civic year 2024/25.

**Decision:**

Cabinet:

1. Noted the appointments and amendments to appointments made since the Annual Meeting of Council as set out at paragraph 2; and
2. Agreed to recommend to Council that Councillor Noel Bayley be appointed as Deputy Mayor for the Civic year 2024/25.

**Reasons for the decision:**

N/A

**Other options considered and rejected:**

N/A

**CA.149 MINUTES OF ASSOCIATION OF GREATER MANCHESTER AUTHORITIES / GREATER MANCHESTER COMBINED AUTHORITY**

Councillor Quinn highlighted the Vision Zero Strategy, which sought to eliminate all traffic fatalities and severe injuries, while increasing safe, healthy, equitable mobility for all.

**It was agreed:**

That the minutes of the Greater Manchester Combined Authority meetings held on 26 January and 9 February 2024 be noted.

**CA.150 EXCLUSION OF PRESS AND PUBLIC**

**Decision:**

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

**CA.151 PROCUREMENT OF WATER HYGIENE MONITORING SERVICES FOR THE PREVENTION OF LEGIONELLA AWARD RECOMMENDATION - PART B**

Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs and HR, presented the Part B report which set out the full financial details.



**Decision:**

Cabinet approved 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.

**Reasons for the decision:**

As set out for Part A.

**Other options considered and rejected:**

As set out for Part A.

**COUNCILLOR E O'BRIEN**  
**Chair**

**(Note: The meeting started at 6.00 pm and ended at 7.15 pm)**

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<b>Classification:</b> Open	<b>Decision Type:</b> Key
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<b>Report to:</b>	Cabinet	<b>Date:</b> 17 April 2024
<b>Subject:</b>	Review of Neighbourhood Housing Support Services- Complex Needs and Floating Support/Dispersed accommodation services	
<b>Report of</b>	Deputy Leader and Cabinet Member for Health and Adult Care	

## 1 Summary

- 1.1 This report requests the approval for the Community Commissioning division to commence in reviewing two lots of housing related support provision in Neighbourhood Housing Support services. These lots are:
- **Adullam Homes**- Bury Bridges- Complex Needs Accommodation
  - **Calico Enterprise**- Bury Gateway- Floating Support/Dispersed Accommodation
- 1.2 Housing related support services, which includes supported accommodation and floating support services are essential in breaking cycles of homelessness, by providing bespoke support packages to develop independent living skills and improving quality of life. This type of housing is essential to ensure people address their support needs to move forward in their lives.
- 1.3 Adullam Homes was commissioned on 1<sup>st</sup> October 2019 for 3 years (with the option to extend for 2 years), to deliver 30 units of communal accommodation facilities, available to those with higher levels of mental health needs and exhibiting chaotic / complex behaviours. Due to saving demands, the contract value was reduced from £410,216.59 to £338,343.48 per annum, generating a saving to the Council of £71,873.11 per annum, a total of £143,746.22 over a 2-year period.
- 1.4 Calico Enterprise was commissioned to deliver floating support/dispersed accommodation in 2019. The service included delivering 875 hours of support to households regardless of tenure and 30 units of accommodation for single homeless and childless couples. Due to savings demands reduce the contract value from £634,970.77 to £599,970.77 per annum- saving the Council £70,000 over a 2-year period.
- 1.5 Calico Enterprise contractual arrangements end on the 31<sup>st</sup> June 2024. Adullam arrangements end on the 31<sup>st</sup> September 2024.
- 1.6 The combined budget for both services is £938,314.25 pa.

## **2. Recommendation(s)**

2.1 The recommendations are for Cabinet to:

- Extend contractual arrangements of Calico Enterprise from the 1st July 2024 to 31<sup>st</sup> September 2024 to align with the end of contractual arrangements of Adullam at a cost of £151,233
- Agree to reviewing of both services.
- Agree to the procurement of the services to a specification informed by the review.
- Note Cabinet will receive a further report setting out recommendations as to preferred bidders and costs.

## **3. Reasons for recommendation(s)**

3.1 There has been a significant increase of single people that require tenancy related service and households that requires interventions to sustain their tenancies.

3.2 Rough sleeping has increased locally, due numerous factors which include:

- Increase in the number of people with complex needs (mental health, substance misuse and offending behaviours)
- Expensive housing market in the borough contributing to lack of access to the private rented sector and finite support of social housing.
- Regional and local challenges regarding providing accommodation to increased asylum and refugee presentations due to government policy and leave to remain cases.
- Cost of living has increased which has meant that more households are struggling to sustain their tenancies.

There needs to be a review to ensure that supported accommodation for single people and floating support for household reflects these challenges. Services must be fit for purpose, to prevent people from failing in their tenancies and provide housing solutions that develop independent living skills and improve quality of life in the community.

## **4 Alternative options considered and rejected**

4.1 Procurement rules do not allow any further extensions to contractual arrangements. Therefore, it provides an opportunity to review the current services and housing and homelessness pressures in Bury.

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### **Report Author and Contact Details:**

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*Position: Integrated Strategic Lead*

*Department: Health and Adult Social Care*

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## **5 Background**

- 5.1 The Community Commissioning division commissioned a range of Neighbourhood Support Housing services in 2018/19. Each service area was commissioned as separate lot 1 – 4. Lot 1 Complex Needs Service was awarded to Adullam Homes and Lot 2 floating support was awarded to Calico Enterprise.
- 5.2 Lot 3 domestic abuse service was commissioned with contract management transferred to another department in the authority. Lot 4 Young Peoples (16-25) end their contractual arrangements in April 2025, which is still managed by Community Commissioning.
- 5.3 The Council has a statutory duty to support people that are homeless in the Borough and the Council must have a robust Homelessness Strategy to clearly demonstrate how it will meet the required statutory duties and obligations for homelessness in the Borough.
- 5.4 The Council has core strategies that underpin the approach to preventing homelessness. In 2020 a new Housing Strategy was agreed which included a commitment to end rough sleeping by 2024. The Homelessness Strategy, approved in 2022 details the ethos of prevention, early intervention and the targeting of public service resources. The Bury Housing for Adults with Additional Needs Strategy outlines the need to increase the number of beds / units in Bury for people with Adult Social Care needs, which the complex needs service and floating support service also addresses.
- 5.5 **Evidence of housing need due to homelessness/risk of homelessness.**
- 5.6 Since April 2021, demand for statutory homeless services in Bury has increased by over 46% and this is expected to increase further because of the effects of the Covid-19 pandemic and the current 'cost of living' crisis.
- 5.7 The number of recorded rough sleepers has been increasing year on year, from 20 in 2019/20 to 140 in 2022/23. However, these figures are for customers who have been provided non statutory emergency accommodation. It is becoming more challenging to accommodate and support this cohort due to the increasing complexities of their support needs and the limitations of the existing resources and accommodation available.
- 5.8 The Homelessness and Housing Options service is currently supporting and assisting 964 homeless cases and on average the Council receives around 250 homeless self-referrals/new cases per month (a 300% increase from before Covid-19) and over 60 "duty to refer" cases each month. The overall number of homeless presentations to the Council has been increasing significantly year on year, from 2,933 in 2018/19 to 4,044 in 2022/23.
- 5.9 Over the last 24 months demand for statutory services in Bury has increased by over 46% and is expected to increase further.

- 5.10 The complexity and number of asylum seekers, new arrivals and refugees continue to increase within the Borough as the Government introduce and implement new and changed approaches to managing migration.
- 5.11 Due to the implementation of the Afghan Bridging hotel scheme it is estimated that that 82 singles and 23 families will initially be referred to the Homelessness and Housing Options Service. There is evidence that rough sleeper numbers are also increasing due to migration.
- 5.12 Circa 440 asylum seekers are accommodated in Serco / Home office accommodation within the Borough using circa 150 Private Rented Sector properties. This is projected to increase by 100% to 970. It is expected that a high percentage will access homelessness services following Home office asylum decision – either negative or positive decisions.
- 5.13 Home office fast track system to determine immigration status – projected 70 new cases within Bury over the next 3+ months in addition to existing numbers.
- 5.14 The reason for this increase in the incidence and presentation of homelessness cases includes:
- Complex and chaotic lifestyles can result in an inability to sustain tenancies and result in evictions. Most homeless people have experienced some combination of financial, emotional, health or substance abuse.
  - Mortgage repossessions is increasing due to the cost-of-living crisis. The full impact of the crisis is yet to become evident, however the expectation over the next 12 months projects numbers increasing, particularly amongst working families/individuals due to their reducing ability to pay their mortgages and rent along with the associated other housing and general costs.
  - Increased Private Rented Sector (PRS) evictions and Section 21 notices. This is mainly due to affordability issues but also landlords looking at other options due to recent Government policies/intervention that now make it more difficult for landlords in the PRS to operate and it is now less financially attractive to rent properties.
  - The asylum seekers and refugee crisis that has had an impact on both statutory and non-statutory services and will likely continue, in the future in terms of increasing number of people presenting as homeless and many with complex support needs.
  - The lack of available and affordable 'move-on' properties because of the limited housing supply in Bury, means people are staying longer in emergency/temporary accommodation, which limits its availability for other people. The average length of stay in emergency/temporary accommodation is currently 169 days with some families in temporary accommodation for over 12 months.

- 5.15 The Council, despite its extensive range of homelessness prevention activities and effective homelessness strategy, has recently in 2023 had to start using 'bed and breakfast' accommodation due to the increase in homelessness cases and the limited capacity of existing accommodation resources. This is expensive but also not good practice for our customers.
- 5.16 Over the last 1-2 years statutory accommodation has been operating at full capacity. The numbers of individuals/households using temporary accommodation has been increasing year on year.
- 5.17 There were 50 households in temporary accommodation in November 2019; by November 2022 this had increased to 108 households. The lack of affordable and suitable accommodation means that average stay in this temporary accommodation was 169 days in 2021/22 up from 85 days in 2020/21, i.e. an increase of over 100% over that period.
- 5.18 There is currently no slack capacity and, despite the Council's policy of not using 'bed and breakfast' accommodation, over the last few months it has had no alternatives other than to use bed and breakfast accommodation on a short-term basis, which is also expensive to provide.

## **6 Highlights from previous extension reviews of Neighbourhood Housing Support Services**

- 6.1 Feedback from previous reviews during the length of the service has identified the following key issues and headlines in relation to the current range of commissioned provision.
- There is significant demand for all the commissioned supported housing services, i.e. current supply is at full capacity in relation to need.
  - The floating support and dispersed supported housing services were reviewed by the Council in spring 2023. This identified that:
    - The number of people on the waiting list for dispersed accommodation indicates that demand is exceeding supply.
    - The outcomes achieved are clearly improving people's lives by preventing homelessness, building resilience, maximising income and improving health and wellbeing in local communities.
  - The Complex Needs service reviews identified that the shared housing model should be reconsidered. The nature of complex needs means that sharing with others may trigger and intensify challenging behaviours particularly where support levels available would not be as high.
  - The referral and access arrangements should be remodelled, in relation to the current Central Access Point arrangements.
  - Feedback from residents, providers and stakeholders indicates that the main barrier to moving on from supported housing services to independent living is a lack of available move on properties in the social housing sector, and a lack of access to private rented sector housing due to affordability barriers.
  - The current dispersed model of providing statutory temporary accommodation for single people in Bury is not sustainable.

- Feedback from the homeless team indicates that the current A Bed Every Night (ABEN) service model is not effective in addressing the complex support needs of many rough sleepers and other single homeless people.
- Feedback from the homeless team and providers indicates that the routes into different types of accommodation for single homeless people with complex support needs should be redesigned so that there is a more effective 'pathway' from referral through a range of housing options.
- There is a need for additional self-contained supported housing, as well as shared supported housing provision.
- The support available in some of the supported housing services includes a 'floating' nighttime staff member. Whilst this will be sustainable for many clients, some homeless people with complex support need are likely to require 24/7 support.
- There is an ongoing need for access to floating support to assist people to maintain a tenancy once they move into general needs housing.

## **7 Aligning Lot 1 and 2 contractual arrangements**

- 7.1 The services of both lots do not align to each other regarding contract end (Calico- 31<sup>st</sup> June 2024 and Adullam- 31<sup>st</sup> September 2024). This is problematic as both services are closely linked in their role and function i.e. to prevent homelessness and develop independent living skills.
- 7.2 Registered Housing Providers deliver housing to both services on lease arrangements, with a combined housing portfolio of circa 62 units of accommodation. Until there is a clear understanding of what needs to be commissioned, there is a risk that housing models available do not reflect the demand regarding needs of residents.
- 7.3 There is a potential to bring both services together into more effective commissioning that provide a one service approach to housing related to support for people and household that are homeless or at risk of losing their tenancies.
- 7.4 Clearly, evidence suggest that the number of people that have complex needs has significantly increased over the last 3 years. This has meant that both services have had to accommodate people with complex needs to ensure that people are accommodated and supported i.e. demand has dictated services need to provide a similar accommodation/support service.
- 7.5 Both services have a wider range of shared accommodation, which needs to be reviewed, as the demand of people that require self-contained accommodation has increased due to risk associated with sharing communal facilities with others.

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### **Links with the Corporate Priorities:**

- 8 The Housing for Adults with Additional Needs Strategy aligns to the Bury Let's Do It Strategy which provides the vision to enable people of all ages to live



well within their neighbourhoods, supported by the integration of public services with our neighbourhood hubs.

**Local**

- Local housing options for local people
- Developing and regenerating the unique townships where people live
- Prevent the need for Bury residents to have to move out of the borough to have their needs met.
- Bring Bury residents back in borough if its right for them.
- Work with local developer's and providers who know the local area.

**Enterprise**

- Encouraging enterprise to drive inclusive economic growth through our business community.
- Enterprising innovation and creative solutions to current housing issues.
- Be bold in our housing solutions and future developments in Bury.

**Together**

- Working together to design quality, fit for purpose homes for people with additional needs in Bury.
- Working together with service users, their cares and families to shape accommodation options and design.
- Working together to ensure inclusivity throughout the housing agenda.

**Strengths**

- Taking a strength- based approach to recognise the assets and strengths of communities.
- Recognising the strengths of individuals enabling their independence, choice, and control for housing.

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**Equality Impact and Considerations:**

No EIA required at this stage due to extension of current contract arrangements. EIA will be required on the outcome of the proposed review.

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**Environmental Impact and Considerations:**

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

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**Assessment and Mitigation of Risk:**

Risk / opportunity	Mitigation
Increase of demand of people who having housing/homelessness problems	The review will consider the pathways which are required to ensure early

accessing the service and have complex needs (mental health, offending histories, and substance misuse problems).	identification of people/households that require housing related support. This will include different ways of working to develop support packages which are not only tenancy related but provide interventions for other aspects of people lives to develop independence and resilience.
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### **Legal Implications:**

A short-term extension of this kind to align one contract with another contract's termination date is permissible without a formal exemption. That is provided it is for the specific purpose of enabling an overall review of the provision followed by a procurement. In legal terms this is a holding over arrangement, but it can only be utilised in extremely limited circumstances such as this case.

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### **Financial Implications:**

The costs for letting this contract were provided for in the Medium Term Financial Plan agreed by Council in February 2024.

As part of the monthly budget monitoring cycle, Finance and Budget holders will track the expenditure linked to contract/s costs ensuring that all expenditure aligns to the funding provided. Any financial risks/pressures identified will be highlighted to the Director of Adult Social Services as part of the monthly budget monitoring cycle whereby an action plan will be deployed to mitigate any financial risks/ pressures.

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### **Appendices:**

None.

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### **Background papers:**

None.

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

Term	Meaning
ABEN	A Bed Every Night
PRS	Private Rented Sector



<b>Classification:</b> Open	<b>Decision Type:</b> Key
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<b>Report to:</b>	Cabinet	<b>Date:</b> 17 April 2024
<b>Subject:</b>	Home to school travel assistance and transport policy	
<b>Report of</b>	Deputy Leader and Cabinet Member for Children and Young People	

## 1.0 Summary

- 1.1 The Council has a statutory duty by virtue of the Education Act 1996 to make necessary travel arrangements for all 'eligible children and young people'. The Council must have a policy setting out how it will meet this duty. The current policy was last subject to review in 2015. In January 2024, the DfE published updated guidance in respect of travel assistance and school transport and the Bury policy needs to be reviewed and refreshed to reflect this guidance.
- 1.2 A new policy has been co-produced with parents and has been subject to consultation with a range of stakeholders. This report sets out the outcome from the consultation and makes recommendations in respect of the adoption of a new policy. A copy of the new policy is contained at Appendix One, with a copy of the existing policy contained at Appendix Two.
- 1.3 It is proposed that the new policy be formally adopted, to be published by the 31<sup>st</sup> May 2024, and to be implemented with effect from 1<sup>st</sup> June 2024. All families in receipt of travel assistance provided by virtue of the current policy will have those arrangements protected until a change in the family's circumstances or following a review of the child or young person's EHC Plan.

## Recommendation(s)

Cabinet is requested to:

1. Note the outcome of consultation on the draft home to school travel assistance and transport policy,
2. Approve the policy for implementation on the 1<sup>st</sup> June 2024.

## Reasons for recommendation(s)

The proposed changes respond to revised guidance from the DfE in respect of home to school transport, and reflect the outcome of engagement with parents, and consultation with wider stakeholders.

## Alternative options considered and rejected

Following an investigation by the Local Government Ombudsman, the existing policy was found not to be compliant in respect of the post-19 arrangements.

The changes are required to ensure that the policy reflects updated Government guidance and is statutorily compliant.

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## **2.0 Background**

- 2.1 The Council has a statutory duty by virtue of the Education Act 1996 to make necessary travel arrangements for all 'eligible children and young people'.
- 2.2 The legislation doesn't prescribe how the travel arrangements should be made but that the arrangements must be determined having regard for the needs of the child or young person.
- 2.3 The Council must have a policy setting out how it will meet this duty.
- 2.4 The policy was last subject to review in 2015. In January 2024, the DfE published updated guidance in respect of travel assistance and school transport and the Bury policy needs to be reviewed and refreshed to reflect this guidance.
- 2.5 At its meeting of the 13<sup>th</sup> December Cabinet received a report in respect of the Council's Home to School Transport policy (CA.97) and noted the intention to co-produce a home to school transport policy with parents for wider consultation and for Cabinet to receive a further report with recommendations having regard to the outcome of that consultation.
- 2.6 Following a Local Government Ombudsman investigation into a complaint in respect of travel assistance and transport, the LGO made a number of recommendations including that the Council review its current travel assistance policy, consult on any necessary changes, consider the draft policy for adoption at a meeting of Cabinet in April 2024, and implement the agreed policy by 31<sup>st</sup> May 2024. This was set out in a report to Cabinet at its meeting on the 14<sup>th</sup> February 2024 (CA.127).
- 2.7 An important aspect of any policy impacting on children, young people and their families are that their views are taken into account when designing and implementing those policies.

- 2.8 Throughout January 2024 a series of engagement workshops, facilitated by Bury2gether, took place. They were attended by a number of parents, each themed to focus discussion on key aspects of the current travel assistance policy and how it operates.
- 2.9 These workshops enabled a better understanding of barriers faced by children, young people and their families when in need of travel assistance and/or transport to access school, and the measures that could be introduced that could minimise or remove those barriers.
- 2.10 During February, meetings with Bury2gether enabled the co-production of a draft policy that reflected the key principles that emerged from the engagement workshops.
- 2.11 The key aspects of the draft policy are:
- For Children of statutory school age with an Education, Health and Care (EHC) Plan, or those who are undergoing assessment for an EHC plan or have been placed by the Authority in a school to meet their SEND that is not their local school, travel arrangements will be determined by reference to the individual child's needs;
  - For children and young people not of statutory school age, both pre-school and post 16/post 19, and in receipt of an EHCP, an individual assessment of need will inform the requirement for travel assistance;
  - For all ages, the use of mileage rates or personal budgets be promoted as a cost-effective way of facilitating travel assistance, reducing the burden on home to school transport.
  - That for young people aged 16 and over, where the individual assessment determines the need for travel assistance, other than in exceptional circumstances, this will be met through the provision of mileage payments or personal budgets.
- 2.12 The main changes to the draft policy from the current version are:
- Clearly explaining the forms of travel assistance that may be offered to eligible children and young people. These include mileage reimbursement, personal travel budgets, transport, travel passes and independent travel training.
  - Clarifying the Council's statutory duty in relation to pre-school age children, 5-16 year olds, post 16 provision and adult learners (post 19).
  - Aligning the assessment for travel assistance with the current Education Health and Care Plan (EHCP) process where appropriate.
  - Simplifying the process for a change in circumstances (change of address, school, or the child/young person's individual needs).

- Providing additional flexibility for transport wherever possible to accommodate timetable changes or changes to the school day.

## 2.13 Statutory Duties

- 2.14 The statutory duties apply to Children with Special Educational Needs, disabilities, or mobility difficulties. They largely relate to but are not exclusive to those children and young people with Education, Health and Care Plans.
- 2.15 Section 35B of the Education Act 1996 defines eligible children as those of compulsory school age, 5 to 16 years.
- 2.16 A child is eligible if they are of **compulsory school age**, attend their nearest suitable school and:
- They live more than the statutory walking distance from the school; or
  - Could not reasonably be expected to walk to school because of their special educational needs, disability or mobility problem; or
  - They would not be able to walk to school in reasonable safety even if they were accompanied by their parent.
- 2.17 There is no statutory duty to provide travel assistance or transport to **children of pre statutory school age** although there are an increasing number of children of pre-school age that are being issued with Education Health & Care Plans naming provision in schools or specialist settings, and for whom the same challenges exist as with statutory school age children, in being able to access those settings.
- 2.18 Local authorities do not have to provide free or subsidised **post 16 travel support** but do have a duty under Section 509AA of the Education Act 1996 to prepare and publish an annual transport policy statement specifying the arrangements for the provision of transport or other support that the authority considers it necessary to make to facilitate the attendance of all persons of sixth form age receiving education or training.
- 2.19 This provision may include transport, the use of personal budgets or mileage payments, but may also include concessionary fares scheme, and use of bus passes.
- 2.20 Section 509F and 508G of the Act places a statutory duty on the Council to consider **Post 19 travel assistance**. This applies to students aged 19 and over who commenced their programme of learning after their 19<sup>th</sup> birthday. The Council must consider arrangements for the provision of transport or travel assistance in respect of:
- Adults who are aged 19 or over, to facilitate their attendance at further or higher educational institutions where they are maintained or assisted by the local authority or institutions within the further education sector.

- Relevant young adults (i.e. those with an Education Health and Care plan that can be maintained up to the age of 25) receiving education or training at institutions outside both the further and higher education sectors. For these young adults, support is only provided where the local authority has secured the provision of education or training at those institutions and the provision of boarding accommodation that is linked to that education or training.
- The council must take account of all relevant circumstances, including the age of the adult, the nature of the route which the adult could reasonably be expected to take and their ability to travel independently.

2.21 For both post 16 and post 19 transport, the legislation recognises that a local response to transport arrangements is important in enabling young people's participation in education and training and the legislation therefore gives local authorities the discretion to determine what financial support or transport is necessary to facilitate young people's attendance. The local authority must exercise its power to provide financial support or transport reasonably, taking into account all relevant matters.

2.22 The draft policy sets out how the Council would propose to exercise this power through the provision of mileage payments or personal travel budgets, other than in exceptional circumstances.

### 2.23 Profile of eligibility/Cost

2.24 There are currently in excess of 2,600 children and young people with an EHCP, of which 658 are in receipt of travel assistance or transport.

2.25 The current profile of travel assistance and Transport is shown below:

	Transport		Mileage/Personal Budget		Out of Borough Transport		Total	
Age	No of children and young people	Cost	No of children and young people	Cost	No of children and young people	Cost	No of children and young people	Cost
Under 5	7	£83,951	0	£0	0	£0	7	£83,951
5-16 years	397	£2,563,905	97	£133,659	88	£498,065	582	£3,195,629
Post 16	44	£390,592	17	£21,353	0	£0	61	£411,945
Post 19	8	£139,760	0	£0	0	£0	8	£139,760
<b>Total</b>	<b>458</b>	<b>£3,178,207</b>	<b>114</b>	<b>£155,012</b>	<b>88</b>	<b>£498,065</b>	<b>658</b>	<b>£3,831,284</b>

2.26 A number of pre statutory school age children are in receipt of transport even though the current policy states that children of pre-school age will

not receive transport. These have been agreed either because of exceptional circumstances, or where there has been a challenge to the application of the policy, and through the internal appeals process, the original decision to refuse transport has been overturned.

- 2.27 Out of borough transport is home to school transport arranged directly by independent non maintained special schools linked to the placement of a child or young person, the cost of which is met by the Council.
- 2.28 A significant majority of the post 16 cohort in receipt of transport attend Elms Bank Special School. In accordance with DfE guidance, eligibility for transport is reassessed at transition from Year 11 to Year 12 and consideration has been given to whether young people are attending the nearest college that can meet their needs. Nevertheless, eligibility has remained for the majority of students. Within the new policy, existing eligibility will be protected until there is a change in the individual's circumstances.
- 2.29 The use of mileage payments and personal travel budgets were first introduced in the 2015 policy and take-up has steadily increased over time. They are an essential way to provide flexibility to parents enabling them to put in place arrangements that suit their needs. In addition, they provided a cost-effective solution, with a cost per child or young person much lower than for home to school transport. In addition, the use of mileage or personal travel budgets alleviates pressure on the home to school transport system which experiences challenges in recruiting sufficient drivers and escorts to meet the current demands.
- 2.30 In respect of statutory age children, mileage payments and personal travel budgets can only be put in place by agreement with parents. Feedback following the parental engagement sessions indicated that the level of payments, and some of the processes linked to payments acted as a barrier to increased take-up.
- 2.31 For post 16 and post 19 young people, mileage rates and personal budgets can form the basis of the Council's offer of travel assistance, and does not require the agreement of parents or the young person.

## **2.32 Funding**

- 2.33 As a result of the Council introducing a zero based budgeting approach for the financial year 2024/25, the agreed budgets for travel assistance and transport have been established at a level commensurate with current costs.
- 2.34 The approved budgets for 2024/25 are as follows:

Personal Travel assistants/bus escorts	£633,000
Home to School SEN General	£199,200
SEN Transport - Outborough	£529,000
Independent school travel	£81,100
Home to school – individual schedules	£2,448,450



Home to school – general	£163,560
Home to school – non SEN general	£138,300
Home to college transport	£422,100
Total budget provisions	£4,614,710

2.35 In setting budgets at this level, the Council committed to identify efficiencies in the delivery of travel assistance and transport, in order to deliver financial savings of £345,000, for the 2024/25 financial year, resulting in a net approved budget of £4,269,710.

2.36 The per capita cost of transport for a 5-16 year old is £6,458, whereas for those families taking up mileage rates or personal travel budgets, the per capita cost is £1,377. For post 16, the comparable costs are £8,877 and £1,256 respectively. For post 19, the per capita cost of transport is £17,470.

2.37 The proposed policy makes clear that eligibility for travel assistance will be based on an assessment of need. However, it makes clear that use of mileage rates and personal budgets will be promoted for statutory age children and young people, and for post 16 and post 19 students, will form the basis of the Councils offer where need for travel assistance is determined.

2.38 Whilst eligibility for travel assistance or transport can only be determined on a case-by-case basis following an assessment of need, some assumptions can be made in respect of the future profile of activity, particularly for post 16 and post 19 students where mileage rates and personal budgets will form the basis of the offer for the majority of students.

2.39 If, for children of statutory school age currently being provided with home to school transport, the take up of mileage payments and personal budgets could be increased by 5% this would reduce cost by £101,789 in a full year.

2.40 Given the post 16 offer, if 90% of post 16 and post 19 students were determined as eligible for travel assistance to be provided with a personal budget or mileage payment, as the standard offer, and with the balance remaining eligible for transport, this would reduce cost by £403,101 in a full year.

2.41 This would result in a revised profile when compared with the table in paragraph 2.24 as set out below:

	Transport		Mileage/Personal Budget		Out of Borough Transport		Total	
Age	No of children and young people	Cost	No of children and young people	Cost	No of children and young people	Cost	No of children and young people	Cost
Under 5	7	£83,951	0	£0	0	£0	7	£83,591

5-16 years	377	£2,434,666	117	£161,109	88	£498,065	582	£3,093,840
Post 16	6	£53,262	56	£69,080	0	£0	61	£122,342
Post 19	1	£17,470	7	£8,792	0	£0	8	£26,262
<b>Total</b>	<b>391</b>	<b>£2,589,349</b>	<b>179</b>	<b>£238,981</b>	<b>88</b>	<b>£498,065</b>	<b>658</b>	<b>£3,326,395</b>

- 2.42 Based on the current number of children and young people in receipt of travel assistance, the policy can be delivered within the available resources, as determined by the Council's approved budget for 2024/25, subject to the impact of any tapering arrangements whereby existing eligibility is protected until a change in an individual's circumstances, and with the caveat that eligibility can only be determined based on an individual's assessment of need.
- 2.43 The removal of post 16 transport will see a phased reduction in demand on transport and an increase in mileage/personal travel budgets at a reduced cost.
- 2.44 All transport is reviewed on an annual basis commencing in May in preparation for the new academic year, any vacant seats created by leavers/children that are changing school are generally replaced with new applicants and the routes reviewed to ensure the most efficient and effective use of resources. As transport demand on post 16 will start to decrease from September 24 it is expected that routes to Elms Bank College and Bury College can be consolidated and contracts gradually terminated over a 3 year period.
- 2.45 It is anticipated that a saving of £140,000 will be achieved on post 16 transport requirements for the 2024/2025 academic year. This saving is achieved by young people leaving the college they are currently attending allowing the termination of the contract, a reduction in mileage where young people are travelling on shared transport or the re-tendering of a route due to a reduction in the number of young people travelling. It is expected that routes to Elms Bank College and Bury College can be consolidated, however this will be dependent upon the young people's individual needs, vehicle requirements and the location of their home addresses.
- 2.46 It is also anticipated that further savings of approximately £55,000 will be achieved for the 2024/2025 academic year by the termination of four vehicles with sole occupancy due to the young people leaving their school setting (5-16 year olds, statutory provision). Additional savings may be achieved due to children leaving shared occupancy vehicles, however the savings achieved will be determined by the demand on the service.
- 2.47 Savings are also expected to be made by the placement of more children within the borough such as at the recently opened Brookhaven School, therefore reducing the cost of transport for children/young people attending out of borough schools. Although transport is likely to increase to in-

borough schools the reduction in mileage and enhanced route planning should generate a saving over the next few years.

- 2.48 Given the intention to promote the use of personal travel budgets or mileage payments for statutory school age children and young people, it is proposed to review mileage rates and the potential introduction of banding arrangements for personal travel budgets to ensure that they are an attractive option to parents, and to encourage take up of these forms of travel assistance as opposed to home to school transport.
- 2.49 This review will be undertaken separately and be subject to a further report to Cabinet. Until that time, existing funding rates will be used.

### **3.0 Independent Travel Training**

- 3.1 A contract is in place with Pure Innovations to provide independent travel training to young people. Currently there are 1 full time and 2 part time travel trainers with an overall target of training 18 young people per year.
- 3.2 There is an opportunity within the existing contract to invest in an additional part time travel trainer at a cost of £12,030 per annum. This could potentially allow an additional 5 or 6 young people to successfully complete the travel training programme each year. The average cost for a young person on transport equates to approximately £6,925 per year, suitability for independent travel training is currently assessed at year 7, year 9 and year 12. Most young people are not ready to commence travel training in year 7 and require a settling in period of 12 to 18 months in their new school. Where a young person successfully completes independent travel training in year 9 the Council will see an indirect cost benefit for the remainder of their school/college life. This could potentially be a cost avoidance saving of up to £13,500 per young person in years 10 and 11.

### **4.0 Engagement and Consultation feedback**

- 4.1 Throughout January a series of parental engagement workshops took place to inform the drafting of a new co-produced policy. Working with Bury2gether parents/carers of service users and schools/colleges were invited to the sessions that were held at The Bury SEND Hub, Mosses Community Centre and online via Microsoft Teams.

- 4.1.1 Each session was run on an informal workshop basis and themed to generate discussion:

Group 1 – What do we mean by SEND transport?  
Group 2 – Implementation & operational practice  
Group 3 – Service redesign  
Group 4 – Workforce training  
Group 5 – Overview of the reviewed policy

The purpose of the sessions was to understand the barriers that families face with the existing policy and to consider how children and young people and their families can be better supported.

The following summarises the key themes and emerging principals emanating from the engagement sessions.

## **Service Redesign**

4.2 The current application process for travel assistance/transport is separate to the Education Health & Care Plan assessment process with its own eligibility criteria assessment process that is only commenced once an EHC Plan has been issued. The emerging principles are:

- That assessment for travel assistance/transport needs to be more closely aligned to the Education Health & Care Plan assessment process, and that information collected as part of the EHCP process should inform consideration for travel assistance or transport.
- Travel assistance/transport should be determined based on a comprehensive assessment of the child/young person's needs and family circumstances, to be undertaken alongside the EHC plan assessment process, rather than based on a pre-determined set of eligibility criteria linked solely to transport. Ensuring that eligibility is needs based.
- Eligibility for travel assistance/transport to be confirmed at the point that a school is being consulted in relation to the EHCP assessment to enable parents to make informed decisions before a school is named on a plan.
- Annual reviews of EHC plans should consider travel assistance/transport, recognising that transport cannot form part of the plan, but the need for transport both informs and is informed by the EHC Plan.
- Independent travel training should be 'offered' as a supportive package rather than an alternative to travel assistance/transport – although from age 14 it should feature on an annual review of the EHC plan linked to Preparing for Adulthood

## **Eligibility**

4.4 The current policy refers to eligibility linked to statutory school age (5-16) based on the Council's statutory duty to provide travel assistance, with the Council having discretion to provide travel assistance in other circumstances. The emerging principles are:

- In line with the principle of aligning travel assistance/transport to the EHCP process, eligibility should be based on need linked to the delivery of the EHC Plan.

- Recognising that there is still a need for a separate policy statement in respect of post-16 and post-19 travel assistance, but that the same principle should apply that the Council's discretionary provision is linked to need as assessed through the review of the EHC Plan.

With a focus on transport being aligned to the EHC Plan process, it is important to recognise that in some circumstances, travel assistance may need to be considered where there is no EHCP, so there must also be a stand-alone process for these cases.

### **Travel Assistance Offers**

4.5 Different travel assistance/transport offers should respond to the child's needs and family circumstances as determined through the EHC Plan process, to include:

- Mileage rates
- Personal budgets
- Home to school (common pick-up points)
- Home to school (door to door)

### **Mileage Rates & Personal Budgets**

4.6 Linked to the different travel assistance offers, useful feedback has been provided as to the barriers to take-up of those offers:

- Current mileage and personal budget rates do not reflect actual costs and therefore aren't an attractive offer. Other local authorities have banding arrangements and/or enhanced rates which, if adopted have the potential to increase take-up of those options, reducing the requirement for home to school transport.
- Mileage rates and personal budgets need to be published so that parents are aware of what is available.
- There are often restrictions applied to how personal budgets can be used and there should be greater flexibility in their use.
- Processes for payments in respect of mileage is burdensome with parents required to meet costs up front, and payments being made retrospectively. It was suggested that a process by which payments are made in advance with retrospective adjustment if attendance falls below a certain level would make the offer more attractive to parents.

### **Flexibility**

4.7 A common theme throughout was the need for flexibility in the provision of travel assistance/transport to support families in a number of ways:

- The ability for parents to pool resources to enable shared taxi's/car sharing, funded by mileage rates or personal budgets, and how the local authority could facilitate this.

- Enable transport to be flexible to respond to changes over a week, for example to facilitate attendance at after school clubs and to respond to reduced timetables.
- To enable different addresses to be specified for collection and drop off on specific days.

### **Workforce Development**

4.8 There is a recognition that the successful operational delivery of transport is heavily reliant on the staff in the school and college transport team, and with the drivers and personal escorts employed for each journey.

- Recruitment and retention of staff, and what can be done to improve this.
- A programme of training & development for drivers and personal escorts.

### **Communication**

4.9 Effective communication between the local authority and parents was seen as key to the effective delivery of travel assistance and travel arrangements. There should be a focus on:

- Streamlined processes – including aligning travel assistance to EHC Plan assessment.
- Timely communications with parents/carers.
- Improved web-pages.
- Independent travel training and how assessments are carried out, and what is communicated to parents to remove some of the anxiety that parents have.
- Performance standards and how the Council will hold contractors to account, and ensure parents are aware, including emergency arrangements.

4.10 In early February, further meetings were held with Bury2gether (parent carer forum) to co-produce a draft proposed policy reflecting the emerging principles from the workshops.

4.10.1 Consultation on the draft proposed policy was launched following half-term, week commencing 26 February and closed on Friday 5 April 2024.

4.10.2 The following cohorts were directly informed of the consultation via email and invited to submit their views via an online form:

- Parents/Carers of service users

- Parents/Carers of children & young people in receipt of an EHC (Education, Health and Care) plan but not in receipt of travel assistance
- Workplace teams/colleagues
- Schools
- Colleges
- School governors
- Councillors & MP's
- Bury2gether (Parent/Carer forum)
- Contractors
- Pupil Escorts

In addition, the consultation has been advertised on Bury Council's website, the local offer webpage, social media and in the Bury SEND Newsletter. Bury2gether (parent/carer forum) have also advertised the consultation on their Facebook page and have continued to encourage participation amongst the parents/carers they support and represent.

#### **4.11 Consultation outcome**

4.12 A summary of the consultation responses received is contained at Appendix Three.

4.13 The consultation asked a number of questions linked to the emerging themes from the stakeholder engagement workshops, and also sought views on the new policy.

4.14 The outcome from the consultation can be summarised as:

4.14.1 A total of 45 responses were received, 38 of which were submitted by parents or carers, with one from a child, and the balance from schools, colleges, professionals and an academy trust.

4.14.2 Whilst the majority of respondents found the new policy easy to understand or expressed a neutral view, almost a 1/3<sup>rd</sup> of respondents indicated it was somewhat not easy to understand. It is proposed that alongside the launch of the new policy, a summarised guide be produced.

4.14.3 In terms of the travel assistance offer, respondents were asked to confirm their awareness of the options available (multiple selections could be made). Only 15% of responses confirmed awareness of personal budgets and independent travel training which indicates that further promotion of the options available within the travel assistance offer is required, which can also be incorporated into the summarised guide.

4.14.4 All travel assistance options available within the current policy will remain in the new policy. The majority of respondents who expressed a view agreed with this, with the caveats that current personal budgets and mileage reimbursement rates do not cover the actual costs incurred, and that the complex needs of the children and young people concerned must be considered.

4.14.5 In line with the emerging principles from the initial engagement workshops, the majority (78%) agreed with alignment of assessment for transport with the Education, Health and Care assessment process, believing that it would have a positive impact for the families involved.

4.14.6 The consultation feedback from Elms Bank School and College raised a number of concerns about the impact of the proposed changes, particularly on post 16 and post 19 students. These concerns mainly centred on the disconnect between the EHCP process and transport; the specific issues relating to the split site arrangements that exist at Elms Bank; and the complex needs of many of the students attending the school and college and how these will be taken into account when assessing for travel assistance or transport.

The feedback included the following comment *"This circumstance will have favourable outcomes for families **only** if the determination made by the Educational Health and Care Plan (EHCP) team regarding the more suitable provision is duly respected by the Transport team. The formulation and revision of an EHCP involve extensive hours of professional deliberation and effort to accurately represent the child's needs. It is untenable for a transport policy to unilaterally negate the outcomes of this collaborative, multi-agency endeavour merely due to a standalone policy"* and *"Suitable transport needs careful consideration with regards to catering for learners with complex, SEMH and/or needs."*

The new policy makes a clear commitment to align the EHCP and transport assessment processes which are intended to address these concerns.

The response from Elms Bank goes on to comment on a number of other aspects of the policy, citing examples of where the current arrangements fall short of responding to the needs of children, young people and their families. The principle established in the new policy that determination of eligibility for travel assistance or transport will be based on an assessment of need responds to these concerns.

The helpful and constructive comments will help frame the future working arrangements when the EHCP and transport processes are aligned and Officers will commit to working with Elms Bank School and College when implementing the new policy.

4.14.7 Similarly there was strong support for streamlining processes for occasions when there is a change in circumstance, such as change of address, change of school, or a change in needs.

4.14.8 There was significant support for the intention to assess pre-school children for eligibility for transport alongside the EHCP assessment process, based on the needs of the child, rather than the current policy that excludes children under statutory school age.

4.14.9 In respect of post 16 students, the consultation sought views on the intention to offer students deemed eligible for travel assistance a personal budget, mileage payment or independent travel training. 26 of 44



respondents agreed, with 9 disagreeing and the remaining being neutral. Within the new policy existing eligibility of this non-statutory element is protected until a change in an individual's circumstances.

4.14.10 For post 19 students, the consultation sought views on the intention of the Council to assess for eligibility based on need and to then provide travel assistance primarily through the use of personal travel budgets or mileage payments, but which could include transport in certain circumstances. The majority of respondents agreed with this approach, with only 4 of the 42 responses disagreeing.

4.14.11 Feedback from the co-production sessions indicated that flexibility would be helpful for families in situations where for example schools finish early at the end of term or to support attendance at school wraparound care provision. The new policy states that the "Council may work with parents/carers to accommodate changes where possible while having regard to the constraints of operational delivery and efficient use of its resources to allow for this". The majority of respondents supported this.

4.14.12 The consultation sought views on the barriers to families in taking up alternative travel options, such as mileage reimbursement, personal travel budget or independent travel training. Again some respondents cited rates of personal budgets and mileage reimbursements being insufficient to cover costs incurred, other reasons given were in relation to family circumstances and/or the needs of the child or young person concerned.

4.14.13 Respondents were invited to add any further comments regarding the proposed Home to School Travel Policy. Comments included:

- Suggestion that mileage reimbursement to be based on attendance records rather than mileage claim forms
- Complexity of individuals' specific needs must be taken into account
- "This will be very helpful to a lot of parents"
- Thoughtful consideration of challenging behaviour associated with significant needs is required
- Concerns around impact of travel offer following a change in circumstance

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### **Links with the Corporate Priorities:**

Elements of the proposal will support key ambitions of the Let's do it strategy:

- Improved quality of life
- Improved educational attainment
- Increased adult skill levels and employability

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### **Equality Impact and Considerations:**

EIA concludes that there is potential negative impact due to the removal of non statutory transport for post 16 year olds. Mitigations have been considered and are planned to reduce the negative impacts this group may experience. With mitigations, this does not post significant risk to the council or service users.

Other groups affected by the policy are likely to experience positive impacts due to amended and additional services.

A full Equality Impact Assessment is contained at Appendix Four.

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### **Environmental Impact and Considerations:**

The promotion of more efficient ways to travel to and from school will reduce the number of journeys/mileages undertaken by the service therefore reducing carbon emissions while maximising the capacity on existing routes. The promotion of independent travel training will continue to contribute to a reduction in carbon emissions and continue to support the healthy lives of children and young people residing within the borough.

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### **Assessment and Mitigation of Risk:**

<b>Risk / opportunity</b>	<b>Mitigation</b>
<p>The key risks associated with the proposed change in policy are of legal challenge and reputational damage to the Council.</p> <p>There is potential for significant negative impact for some of our most vulnerable children and young people who currently receive travel assistance under the existing policy as any changes to eligibility in the new policy may result in those families no longer being eligible.</p>	<p>In co-producing a draft policy with the parents forum, the Council can seek to respond to some of the concerns, and ensure that the policy, whilst remaining statutorily compliant, also continues to meet the needs of parents, children and young people.</p> <p>If any changes to eligibility are proposed, there is scope to ensure that any families in receipt of travel assistance under the current policy, continue to be eligible until their circumstances change. Those families would therefore not see an immediate withdrawal of travel assistance.</p>

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### **Legal Implications:**

In accordance with s.509AA of the Education Act 1996, local authorities have a duty to prepare and publish an annual transport policy statement specifying the arrangements for the provision of transport, or otherwise that the authority considers necessary, to make to facilitate the attendance of all persons of sixth form age receiving education or training.

In carrying out those duties, the council must have regard to the Statutory Guidance for Local Authorities Post 16 transport and travel support to education and training by the Department for Education.

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**Financial Implications:**

The projections in the table in paragraph 2.41 demonstrate that implementation of the revised policy will mean that service will stay within the budget framework approved by Council and set out in paragraph 2.34.

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**Appendices:**

Appendix One – Travel assistance between home and school or college for pupils and young people with Special Educational Needs and Disability – new policy

Appendix Two – Current Home to school transport policy

Appendix Three – Summary of consultation responses

Appendix Four – Equality Impact Assessment

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**Background papers:**

[Travel to school for children of compulsory school age - GOV.UK](#) DFE guidance issued January 2024

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

Term	Meaning

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## **Department for Children & Young People**

# **Travel assistance between home and school or college for pupils and young people with Special Educational Needs and Disability**

**1 June 2024**

## **HOME TO SCHOOL AND COLLEGE TRAVEL ASSISTANCE POLICY FOR CHILDREN AND YOUNG PEOPLE WITH SPECIAL EDUCATIONAL NEEDS, DISABILITIES OR MOBILITY DIFFICULTIES**

### **1. INTRODUCTION**

- 1.1 This policy outlines the travel support available for children and young people with Special Educational Needs and Disabilities (SEND) or mobility difficulties living within the boundaries of Bury Council to access education.
- 1.2 The policy is based on statutory guidance issued by the Department for Education.

The Council has a statutory duty to make necessary travel arrangements for eligible children and young people with Special Educational Needs and Disabilities and must have a policy setting out how it will meet this duty. The current policy was last subject to review in 2015.

The DfE has recently published updated guidance in respect of travel assistance, and it is timely therefore that Bury reviews its policy to reflect this guidance.

Working with Bury2gether, a series of engagement sessions have been held with parents and carers during January 2024 to understand the barriers families may be facing with the existing home to school transport policy and to consider how we can better support young people and their families. The department has received valuable feedback that has been taken into consideration when co-producing this new proposed policy with Bury2gether.

This proposed policy responds to the feedback received and outlines the travel support available for children and young people with Special Educational Needs and Disabilities (SEND) or mobility difficulties living within the boundaries of Bury Council to access education.

- 1.3 The aim of the Council's travel assistance policy is to ensure that all children and young people should lead lives that are independent and as free from restriction as possible, thereby contributing to the vision, purpose and values of Bury Council.

[Our Vision and Strategy](#)

- 1.4 The provision of travel assistance by the Council will be based on individual needs and circumstances and have regard to the efficient and effective use of resources.

### **SUB HEADING**

- 1.5 This policy is set out in four sections as follows:

#### **SECTION A**

- Pre-School children – (age 3-4) attending Hoyle Nursery, or a mainstream or special school with an Education, Health and Care Plan
- Children of compulsory school age (5-16) attending a mainstream or special school with an Education, Health and Care Plan.
- Children of compulsory schoolage (5-16) attending a mainstream school or specialist unit within a mainstream school who have special educational needs, a disability or mobility difficulties, but who do not have an Education, Health and Care Plan.

## **SECTION B**

- Young people aged 16 to 25 years with special educational needs and disabilities – students of sixth form age (16-18) and adult learners (aged 19-25)

## **SECTION C**

- The legal background to home to school travel, definition of terms used in this policy, coverage and service standards.

## **SECTION D**

- Appeals procedure

1.6 Wherever possible, in the provision of travel assistance, the Council will consider travel options that lead to reducing the number and length of vehicle journeys.

1.7 This policy explains:

- Who is eligible for assistance with travel assistance from Bury Council.
- The legal basis for the provision of travel assistance by local authorities.
- What kind of travel assistance may be provided.
- How assistance with travel is assessed, and how parents/carers can appeal against decisions made by the Council.
- The Council's transport service standards.

1.8 This proposed policy forms part of the Council's overall Home to School and College travel policy and has been updated to reflect new statutory guidance<sup>1</sup>.

## **SECTION A**

2. This policy relates to travel assistance for children and young people with Special Educational Needs and Disability assessed as requiring travel assistance or transport, which will usually mean those with an Education, Health and Care (EHC) Plan. It may also apply to those who are undergoing assessment for an EHC plan or have been placed by the Authority in a school to meet their SEND that is not their local school. Travel assistance will be determined by reference to the individual child's needs.

2.1 Travel assistance may be provided for Pre-School children – (age 3-4) attending Hoyle Nursery, or a mainstream or special school with an Education, Health and Care Plan.

2.2 Travel assistance may be provided for children of compulsory school age (5-16 years) who, because of their special educational needs, disability or mobility difficulties, cannot reasonably be expected to walk to school<sup>2</sup>.

2.3 Where it is not possible for a pupil to attend a school near to their home because the school is unable to meet their additional needs, travel assistance will be provided. A suitable school is the nearest qualifying school with places available that provides education appropriate to the age, ability and aptitude of the child considering any special educational needs the child may have.

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<sup>1</sup> Post 16, transport and travel support to education and training, January 2024

<sup>2</sup> Paragraph 30, Home to School Travel and Transport Guidance, January 2024.

- 2.4 It is not necessary for a child to have an EHC plan to qualify for travel assistance under this policy, but where an assessment is being undertaken for an EHCP, in parallel, an assessment will be undertaken to determine eligibility for travel assistance or transport.

'Transport provision' is rarely included in an EHC plan, as it is not a form of educational provision, and the majority of children with EHC plans do not need or receive specialised travel assistance from the Council. However, where a requirement for travel assistance is identified, it will be confirmed when the EHCP is issued.

For those children and young people without an EHCP or those requesting travel assistance outside of the initial EHC process, a separate application must be made, and this will be assessed taking into account the individual needs.

- 2.5 Not every child/young person with an EHC plan or who attends a special school will be eligible for free travel to school.
- 2.6 The Council will assess eligibility on the grounds of special educational needs, disability, or mobility problems on a case-by-case basis. The assessment will take into account the child's physical ability to walk to school and any health and safety issues relating to their special educational needs, disability, or mobility problems. Where reasonable, it will also take into account whether they would be able to walk to school in reasonable safety if they were accompanied by a parent/carer<sup>3</sup>.

### **3. Other factors that may be taken into consideration when assessing a child or young person's eligibility for assistance with travel.**

- 3.1 Where the parent/carer of the child or young person has a disability, the local authority is under a duty to make reasonable adjustments if the usual application of this travel assistance policy places a disabled person at a substantial disadvantage in comparison with persons who are not disabled.
- 3.2 Where parents/carers receive the Mobility Component of Disability Living Allowance (or Personal Independence Payments from June 2013) on behalf of the child, and/or a car is provided for them under the Motability Scheme, parents of children of compulsory school age may be asked if they are willing to use this car to provide transport to school for their child. If they agree, they will be given a Personal Travel budget or mileage reimbursement to enable them to transport their child. Payments in lieu of arranged transport will only be made with the consent of a parent. Being in receipt of additional benefits or allowances such as Disability Living Allowance, a Motability vehicle or Foster Care Allowance does not affect a child's eligibility for free home to school travel.
- 3.3 When assessing the need for transport, the child's needs and family context will be taken into account. In accordance with DfE guidance<sup>4</sup> personal circumstances such as parents/ carers attending work, taking other children into other schools, or looking after other children will not be taken into account, unless there is a sibling or another child within the household with Special Educational Needs or Disabilities, or where there are other specific extenuating family circumstances.
- 3.4 Parental preference for a school named in section I of a EHC plan, where the local authority considers that there is a suitable school nearer to the child or

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<sup>3</sup> Paragraph 49, Home to School Travel Guidance, January 2024

<sup>4</sup> Paragraph 52, Home to School Travel Guidance, January 2024



young person's home then the local authority may name that school in the EHC plan. In such cases the Council may require parents to accept responsibility for all travel arrangements to their preferred school and associated costs. However, if the difference in cost between the parents' choice and the nearer suitable school is not significantly more expensive, then the Council will support travel to the parents' preferred school.

- 3.5 In line with DfE guidance<sup>5</sup> the Council must make arrangements to enable a child to travel to school for the beginning of the school day, and to return home at the end of the school day. The Council are not required to make arrangements for:
- Children or young people taken ill during the day.
  - any type of appointments including medical or any other specialists.
  - Children or young people who have been excluded during the school day.
  - Breakfast or after school clubs.
  - A pickup from or return to any address other than the child/young person's home address or designated pick up / drop off point.
  - For children or young people to travel between institutions during the school day.

The Council may work with parents/carers to accommodate changes where possible while having regard to the constraints of operational delivery and efficient use of its resources. This may include where children or young people attend school on a reduced timetable or regular attendance at after school clubs.

Where a child/young person attends after school club on a regular basis on a specified day parents/carers may receive a reimbursement of mileage on the day(s) the child/young person does not access transport.

The Council's policy on the provision of travel assistance for additional journeys is described in more detail at Section C.

- 3.6 The Council will exercise its discretion in the award of travel assistance where the child is below compulsory school age. These are:
- 1) Pre-school children – Where a 3 to 4 year old has been assessed as requiring an EHCP with specialist provision being named on the plan.
  - 2) Reception children – Where a 4 year old is attending a reception class in an infant or primary qualifying school and their 5<sup>th</sup> birthday occurs during the year in which they start school.

The parent/carer must submit evidence to demonstrate why the child is unable to walk to school and why they are unable to accompany them or take them to school.

#### **4. What assistance with travel may be offered**

- 4.1 Once a child's eligibility for travel has been agreed, the Council will offer the most appropriate type of travel arrangement. This decision will be based on the identified needs of the individual child or young person and the family context and will take account of the Council's duties to make the best use of its

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<sup>5</sup> Paragraph 64 Home to School Travel Guidance, January 2024

resources. It should be noted that the mode of travel assistance offered will be reviewed at least annually and may change as the needs of the child or young person change, whilst continuing to ensure the best use of the Council's resources.

Travel assistance will be reviewed as part of the child or young person's EHCP annual review. For those children and young people in receipt of travel assistance without an EHCP contact will be made by the School and College Transport Team.

- 4.2 For children attending school on a daily basis, travel assistance will usually only be provided for the beginning and end of the school day. Where there are changes to the school day, e.g. opening at a later time or closing earlier due to building issues, or finishing earlier at the end of term, wherever possible the Council may consider a change to transport provision while having regard to the constraints of operational delivery and efficient use of its resources.

Transport will not usually be provided or adjusted for children to attend breakfast clubs/after school clubs however, an alternative form of travel assistance may be offered where there is regular attendance at breakfast clubs/after school clubs.

- 4.3 Travel assistance is also provided where pupils are registered at more than one school setting (dual placements) so long as the child / young person meets the eligibility criteria.
- 4.4 A child boarding on a weekly basis where the school is closed at weekends will be provided with travel assistance at the beginning and end of the school week, other periods of closure and during term time only. A child boarding on a termly placement where the school is not closed at weekends will be provided with travel assistance limited to the start and end of the school term, half terms and for periods of whole school closure only. Any other journeys required will be the responsibility of parents/carers including attendance at annual reviews, additional home visits at weekends or any other time.
- 4.5 The Council's policy on the provision of travel assistance for additional journeys in various circumstances is explained in Section C.

## **5. The Travel Offer**

- 5.1 The Council will always consider forms of travel assistance that helps to develop travel independence skills to enable children and young people to lead independent lives as they grow older.
- 5.2 The options that will be considered when assessing the travel assistance that will be provided will include, but are not limited to:

**Mileage rate:** The council will re-imburse parents a mileage rate if they choose to transport their child/young person to school in their own vehicle. Mileage is calculated based on the Council's ICT database measurement tool and will be paid for a maximum of two return journeys per day.

**Personal Travel Budget (PTB):** It may be possible for the Council to provide parents/carers with an amount of money to enable them to provide personalised travel arrangements that best and most flexibly suit the needs of their child and family. The sum provided will be at the discretion of the Council; it will be based on the distance travelled from home to school, and will not exceed the cost of direct provision of transport by the Council, or a share of

that cost where the child would otherwise travel with other children in a shared vehicle. It is parents'/carers' responsibility to ensure that travel arrangements made by them are safe and accessible and that school attendance is maintained. A PTB can be refused or withdrawn if these conditions are not met. Personal travel budgets consider the route from parents/carers home address to school and the distance is measured using the Council's transport software, the personal budget is then based on the mileage for two return journeys per day. The travel allowance for a personal travel budget is contained at Appendix A and published on the Council's website [www.bury.gov.uk](http://www.bury.gov.uk).

A personal travel budget must be used to facilitate the child/young person attending school; however, it can be used in a variety of ways such as:

- support the cost of driving your child/young person to and from school (purchase of fuel).
- arrangements with a friend or relative to take your child/young person to school.
- arrangements with a friend or relative to act as a PA for your child/young person in a family members vehicle or their own.
- arrangements to book an individual taxi.
- arrangements to car share or book a joint taxi with other parents where their children are attending the same school.
- support arrangements where a child/young person is attending school on a reduced timetable.
- purchase of travel passes for other children so they can travel to school whilst parents transport the young person in receipt of the personal travel budget.
- purchase a place at before and after school club for the child/young person in receipt of personal budget.
- purchase of a place at before and after school club for other children to allow parents/carers to transport the young person in receipt of the personal travel budget.

**Transport vehicles:** Where assessed as essential, the Council may provide a vehicle to transport a child or young person to and from school. Where transport vehicles are provided, these will be either Council vehicles and drivers or those provided by a suitably qualified and licensed commercial provider working to contractual standards set by the Council.

Whenever possible, children will travel together in shared vehicles. These will be specially adapted to meet the needs of those travelling on them. Each route will be planned on the basis of school start and finish times and the shortest possible route for all children travelling on a particular vehicle. Under very exceptional circumstances the Council may transport pupils in separate taxis or private hire vehicles based on the assessed needs of the child or young person. Arrangements of this kind will be kept under regular review and, where possible, the opportunity will be taken to move to an alternative suitable form of travel assistance.

For primary/nursery age children a home pickup and drop off will be made.

Communal pick up/drop off points may be considered for secondary school children within a reasonable distance from their home address. Where this option is considered an element of independent travel training may be required

to support the child/young person travelling safely to the meeting point. A home pickup and drop off will be made where it is deemed essential to the child or young person's special educational needs or disabilities.

**Independent travel training:** independent travel training may be considered for secondary school age children and young people.

Independent travel training can enhance the young person's confidence and independence by developing personal, social and life skills. It focuses on the needs and capabilities of the pupil and is delivered through working closely with parents/carers and school staff. Independent travel training will also develop young people's personal safety awareness and road safety skills when using public transport. Criteria for successful completion of the training will be based on an agreed comprehensive training programme and a copy of the final assessment will be provided to parents/carers. Successful completion of Independent Travel Training will be signed-off by the Council and parents/carers.

Top up training will be available to support young people with transition when moving to a new school and on social routes during school holidays. Social routes may include travel to family houses, places of interest and social events such as youth groups.

All applications for travel assistance will be reviewed to determine if an assessment for independent travel training should take place. If an assessment for travel training is deemed appropriate a further assessment will be undertaken by a qualified Travel Trainer and involves contributions from the young person and their parents, school staff and other professionals.

Independent travel training may be considered for all young people that are:

- Transferring from a mainstream school to a special school.
- Attend a mainstream school or specialist unit within a mainstream setting.
- Attending a pupil referral unit.
- Attending a post 16 provision.
- Referred by parent or educational establishment at their annual review.

**Travel pass:** To enable the child/young person to travel to school accompanied, if necessary, by an adult via public transport solutions. This is for use on public transport or trams between home and school only throughout the academic year. A personal travel budget or travel pass may also be provided to a parent or travel buddy to accompany the child or young person on the journeys if necessary. An element of Independent Travel Training will be provided for this option if required.

## **6. Vehicle transport service standards and provision of passenger assistants**

- 6.1 The vehicle transport service provided by the Council for children and young people will operate to the service standards described at Section C.
- 6.2 In some circumstances where the Council has assessed that there is a need, a Passenger Assistant may be provided to accompany pupils to school on transport provided by the Council. Passenger Assistants will only be provided where they are necessary for the safe operation of vehicles and/or the care of children or young people. A Passenger Assistant will not necessarily be provided

simply because the pupil is school-aged or because he/she does not know the driver.

- 6.3 All staff involved in the delivering home to school transport hold a Disclosure & Barring Certificate (DBS) at the enhanced level.
- 6.4 Assistance with travel will be provided to meet the needs of a child/young person and there may be circumstances when the transport will need to be reviewed as it is not working. While it is acknowledged that the child/young person has SEND and this may impact upon their behaviour, if the conduct of the child/young person compromises the safety of anyone travelling with them, the Council reserves the right to suspend or withdraw the transport provision. In these cases the Council will work with the family to try to find another travel solution for the child/young person. Please see Section C.
- 6.5 Parents and carers should contact the School and College Transport Team if they have any concerns regarding the driver, passenger assistant or other passengers travelling on the vehicle.

## **7. Application and assessment process**

- 7.1 Eligibility for travel assistance will be considered as part of any new Education, Health and Care (EHC) plan assessment. The assessment for travel assistance will be undertaken at the stage the draft EHC plan is issued.
- 7.2 Where an EHC plan has already been issued, or a child or young person does not have an EHC in place, an application form for travel assistance must be completed.
- 7.3 Where a child or young person is in receipt of travel assistance and there is a change in circumstances such as change of address, school or change in the child or young person's special needs or disability a request to amend travel assistance should be submitted.
- 7.4 Requests for travel assistance will be given full consideration and will take account of the specific needs of the child or young person. Where it is decided travel assistance is required it will be implemented as soon as possible following the decision. In a situation where a new contract and/or a passenger assistant needs to be engaged this time scale may be longer in order to fulfil procurement and recruitment processes.
- 7.5 The application process is dealt with in three stages.

### **Stage 1: Application Process**

Travel assistance will be considered as part of any new Education, Health and Care (EHC) plan assessment. The assessment for travel assistance will be undertaken at the stage the draft EHC plan is issued and will be based on the school placement proposed.

Where this assessment indicates that the child is not eligible for travel assistance, parents/carers will be advised accordingly and will have a right to appeal against this decision, please see Section D.

Where an EHC plan has already been issued, or a child or young person does not have an EHC plan in place, an application form for travel assistance must be completed.

Where a child or young person is in receipt of travel assistance and there is a change in circumstances such as change of address, school or change in the child's or young person's special needs and/or disability a request to amend travel assistance should be submitted.

Application forms can be obtained from the Bury Council website [www.bury.gov.uk](http://www.bury.gov.uk) or by telephoning the School and College Transport team on 0161 253 6968 or emailing [schoolandcollegetransport@bury.gov.uk](mailto:schoolandcollegetransport@bury.gov.uk).

Applications will be acknowledged within five working days on receipt of the application. An initial evaluation of the application will then determine whether assistance is likely to be approved, declined or whether further assessment is required. The parent/carer will be informed in writing of the outcome of the application.

### **Stage 2: Assessment**

This stage will include the evaluation of written evidence and family circumstances. It could lead to an assessment for independent travel training which would include a home visit, consultation with the child or young person's school/caseworkers and any other relevant specialists.

This initial evaluation will normally be completed within fifteen working days following Stage 1 depending on the complexity of the circumstances. If further evidence is required or an assessment for independent travel training needs to be undertaken, this may delay the process and parents/carers will be notified in writing within ten working days, unless for reasons outside the Council's control it is not possible to do so within that time, in which case it will be done as soon as reasonably practicable after that. It is possible at this stage that the application may be declined and parents/carers may appeal against such a decision if they wish.

### **Stage 3: Implementation**

Where the Council agrees to provide travel assistance it will also discuss the type of travel assistance that may be suitable to meet the needs of the child's or young person and their family.

The agreed travel assistance will normally be implemented within ten working days following the offer being made.

If a parent/carer does not accept the travel assistance offered by the Council the appeals process should be undertaken. The process will be suspended pending the outcome of an appeal and parents/carers will need to take responsibility for their child's attendance at school while the appeal is ongoing. Please refer to section D for the appeals process.

If travel assistance is granted for a limited period, parents/carers will be required to submit a change in travel request, or to provide further information, in order to secure continued assistance. At any point throughout the process you have the right to appeal as detailed in Section D.

## **8 Travel assistance review**

- 8.1 All children and young people's eligibility for travel assistance will be reviewed regularly and at least annually. For children and young people with EHC Plans, their continued eligibility for travel assistance will be discussed at the child or

young person's school as part of their annual review. Parents/carers should attend the review in order to consider whether or not travel assistance continues to be appropriate. Where travel assistance has been granted on a time-limited basis further information will be sought prior to the end of the agreed assistance period to enable a timely review to take place. The Council may also review eligibility for travel assistance, this may be by means of a scheduled meeting or via telephone contact. If parents/carers do not participate in these reviews it may result in travel assistance being withdrawn. Parents/carers will be informed of all decisions in writing, including notification of the right to appeal.

- 8.2 Travel assistance will also be reviewed when there is a significant change in circumstances, such as a change in home address, school or a change in the child's or young person's needs. It is the responsibility of the parent/carer to notify the Council immediately of any changes that may affect the provision of travel assistance.
- 8.3 Any changes will be implemented from the beginning of the next half school term / school term or sooner where possible.

#### **Cessation of Support**

- 8.4 The Council will review and remove travel assistance where the child or young person's individual circumstances have changed and either the child or young person is no longer eligible for support, or the child or young person has been assessed as not requiring such support. Assistance may also cease on the request of the parent/carer who may have made alternative arrangements for their child's or young person's travel to school.

## Section B Post 16 Travel

- 9.1 Local authorities do not have to provide any free or subsidised post 16 travel assistance but do have a duty to prepare and publish an annual transport policy statement outlining the arrangements for the provision of travel or assistance that the authority considers necessary to facilitate the attendance of young people attending sixth form education or training<sup>6</sup>.
- 9.2 Local Authorities have a duty to facilitate access to full-time education for all young people aged 16 -18 years <sup>7</sup> and those continuing learners who started their programme of learning before their 19<sup>th</sup> birthday. Under Raising the Participation Age Agenda, young people must remain in full time education and training until the age of 18 years. Under the 'September guarantee', every young person aged 16 or 17 should be offered a suitable place in education or training.
- 9.3 In line with the Local Authority's duty under the Education and Skills Act 2008 to encourage, enable and assist participation of learners with learning difficulties in education and learning, this policy will apply, in some cases to young people up to the age of 25 subject to an individual assessment of need.
- 9.4 In line with the Children and Families Act 2014 and as part of the SEND reforms, it is expected that young people will work towards independence from the earliest opportunities both at home and through their educational placement. The majority of young people who will attend college will be able to travel independently and for those who cannot, opportunities for this to take place should be maximised, through a range of providers.
- 9.5 The responsibility for travel to and from college rests with the young person and their family. There are a number of travel options available within the local community that young people can access.
- 9.6 Alternative travel options are listed in the [Post 16 Travel Policy Statement](#). This is Bury's Transport policy statement which is intended to inform young people in years 11, 12 and 13, and their parents about what travel arrangements and support are available locally. It is published in May each year to help inform choices for the following academic year.
- 9.7 Travel assistance may be provided for young people over 16 years with special educational needs who are attending a full time course (minimum 20 hours) at the nearest provision to their home. Where a young person is not attending the provision nearest to their home address travel assistance will not be provided.
- 9.8 Travel assistance is not available for trips, work experience or any other activity associated with the college course. Alternative arrangements should be discussed directly with the college.
- 9.9 The options that will be considered when assessing the travel assistance that will be provided may include:
- Mileage rate:** The council may re-imburse parents a mileage rate if they choose to transport their young person to college in their own vehicle. Mileage

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<sup>6</sup> Post 16 transport and travel support to education and training January 2019, Section 509AA of the Education Act 1996

<sup>7</sup> Section 509AC of the Education Act 1996 defines persons of sixth form age for the purposes of the sixth form transport duty.



is calculated based on the Council's ICT database measurement tool and will be paid for a maximum of two return journeys per day.

**Personal Travel Budget (PTB):** It may be possible for the Council to provide parents/carers with an amount of money to enable them to provide personalised travel arrangements that best and most flexibly suit the needs of the young person and their family. The sum provided will be at the discretion of the Council; it will be based on the distance travelled from home to college. Personal travel budgets consider the route from parents/carers home address to college and the distance is measured using the Council's transport software, the personal budget is then based on the mileage for two return journeys per day. The travel allowance for a personal travel budget is contained at Appendix A and published on the Council's website [www.bury.gov.uk](http://www.bury.gov.uk).

A personal travel budget must be used to facilitate the young person attending college, however, it can be used in a variety of ways such as:

- support the cost of driving your young person to and from college (purchase of fuel).
- arrangements with a friend or relative to take the young person to college.
- arrangements with a friend or relative to act as a PA for the young person in a family members vehicle or their own.
- arrangements to book an individual taxi.
- arrangements to car share or book a joint taxi with other parents where their young people are attending the same college.
- purchase of travel passes for other children/young people so they can travel to school/college whilst parents transport the young person in receipt of the personal travel budget.
- purchase of college enrichment classes

**Independent travel training:** independent travel training may be considered for college students.

Independent travel training focuses on the needs and capabilities of the young person and is delivered through working closely with parents/carers and college staff. It can enhance the young person's confidence and independence by developing personal, social and life skills. Independent travel training will also develop young people's personal safety awareness and road safety skills when using public transport. Criteria for successful completion of the training will be based on an agreed comprehensive training programme and a copy of the final assessment will be provided to parents/carers. Successful completion of Independent Travel Training will be signed-off by the Council and parents/carers.

Top up training will be available to support young people with transition on social routes during college holidays. Social routes may include travel to family houses, places of interest and social events such as youth groups.

All applications for travel assistance will be reviewed to determine if an assessment for independent travel training should take place. If an assessment for travel training is deemed appropriate a further assessment will be undertaken by a qualified Travel Trainer and involves contributions from the young person and their parents, school staff and other professionals.

Independent travel training may be considered for all young people that are attending a post 16 provision.

### **Adult learners**

- 10.1 Local authorities have a duty with regard to transport or travel for adult learners. The overall intention of the adult transport duty is to ensure that those with the most severe disabilities with no other means of transportation are able to undertake further education and training after their 19<sup>th</sup> birthday to help them move towards more independent living.
- 10.2 An adult learner is a person who starts a course of study **after** their 19<sup>th</sup> birthday. If they are a 'young adult', they will have an Education, Health and Care plan.

Local authorities must make arrangements for the provision of transport or travel assistance, as they consider necessary, in respect of:

- Adults who are aged 19 or over, to facilitate their attendance at further or higher educational institutions (FE and HE, where they are maintained or assisted by the local authority) or institutions within the further education sector (FE).
  - Young adults (i.e. those with an Education Health and Care plan that can be maintained up to the age of 25) receiving education or training at institutions outside both the further and higher education sectors. For these young adults, support is only provided where the local authority has secured the provision of education or training at those institutions and the provision of boarding accommodation that is linked to that education or training.
- 10.3 In making that decision on whether transport provision is required, the Council will take account of the relevant circumstances, including the age of the adult, the nature of the route which the adult could reasonably be expected to take and their ability to travel independently. Case law says that, in deciding what is necessary, local authorities "must exercise their judgment judiciously and in good faith".
- 10.4 If local authorities *do* consider it necessary to make such travel assistance, then any transport provided must be provided free of charge.
- 10.5 Even if the local authority *does not* consider it necessary to make arrangements to provide free transport to adult learners receiving education or training at the institutions mentioned above, they have a discretion to pay some or all of the reasonable travelling expenses if no other arrangements have been made.
- 10.6 The options that will be considered when assessing the travel assistance that will be provided will include, but are not limited to:

**Mileage rate:** The council will re-imburse parents/carers a mileage rate if they choose to transport their young adult to college in their own vehicle. Mileage is calculated based on the Council's ICT database measurement tool and will be paid for a maximum of two return journeys per day.

**Personal Travel Budget (PTB):** It may be possible for the Council to provide parents/carers with an amount of money to enable them to provide personalised travel arrangements that best and most flexibly suit the needs of their child and family. The sum provided will be at the discretion of the Council; it will be based on the distance travelled from home to college and will not exceed the cost of direct provision of transport by the Council, or a share of that cost where the young person would otherwise travel with other children in a shared vehicle. Personal travel budgets consider the route from parents/carers home address to college and the distance is measured using the Council's transport software, the personal budget is then based on the mileage for two return journeys per day. The travel allowance for a personal travel budget is contained at Appendix A and published on the Council's website [www.bury.gov.uk](http://www.bury.gov.uk).

A personal travel budget must be used to facilitate the young adult attending college; however, it can be used in a variety of ways such as:

- support the cost of driving your young person to and from college (purchase of fuel).
- arrangements with a friend or relative to take the young person to college.
- arrangements with a friend or relative to act as a PA for the young person in a family members vehicle or their own.
- arrangements to book an individual taxi.
- arrangements to car share or book a joint taxi with other parents where their young people are attending the same college.
- purchase of travel passes for other children/young people so they can travel to school/college whilst parents transport the young person in receipt of the personal travel budget.
- purchase of a travel pass to allow the young adult to travel to college accompanied by an adult if necessary.
- purchase of college enrichment classes

**Transport vehicles:** Where assessed as essential, the Council may provide a vehicle to transport a young adult to and from college. Where transport vehicles are provided, these will be either Council vehicles and drivers or those provided by a suitably qualified and licensed commercial provider working to contractual standards set by the Council.

Transport will be provided on shared vehicles and at the beginning and end of the college day only. Transport will not be provided to accommodate individual timetables.

Communal pick up/drop off points may be considered for young adults within a reasonable distance from their home address. Where this option is considered an element of independent travel training may be required to support the young adult travelling safely to the meeting point. A home pick up and drop off will be made where it is deemed essential to the young adults special educational needs or disabilities.

**Independent travel training:** independent travel training may be considered for college students.

Independent travel training focuses on the needs and capabilities of the young person and is delivered through working closely with parents/carers and college

staff. It can enhance the young person's confidence and independence by developing personal, social and life skills. Independent travel training will also develop young people's personal safety awareness and road safety skills when using public transport. Criteria for successful completion of the training will be based on an agreed comprehensive training programme and a copy of the final assessment will be provided to parents/carers. Successful completion of Independent Travel Training will be signed-off by the Council and parents/carers.

Top up training will be available to support young people with transition on social routes during college holidays. Social routes may include travel to family houses, places of interest and social events such as youth groups.

All applications for travel assistance will be reviewed to determine if an assessment for independent travel training should take place. If an assessment for travel training is deemed appropriate a further assessment will be undertaken by a qualified Travel Trainer and involves contributions from the young person and their parents, school staff and other professionals.

Independent travel training may be considered for all young people that are attending a post 16 provision.

## SECTION C:

### 1. Legislation – Home to School Travel

- 1.1 This policy has been developed with full regard to the Department for Education Guidance on Home to School Travel and Transport

[Travel to school for children of compulsory school age<sup>8</sup>](#)

[Post-16 transport and travel support to education and training<sup>9</sup>](#)

- 1.2 Under section 508 (B) of the Education Act 1996 the council must provide free travel assistance to facilitate the attendance at school of eligible children resident in the borough of Bury.

A child is eligible if they are of compulsory school age, attend their nearest suitable school and:

- Live more than the statutory walking distance from that school, or
- Could not reasonably be expected to walk to that school because of their special education needs, disability or mobility problem, even if they are accompanied by a their parent.
- Would not be able to walk to that school in reasonable safety, even if they were accompanied by their parent.

- 1.3 Parents/carers are responsible for ensuring that their children attend school regularly under s.444 of the Education Act 1996 (as amended). This includes arranging any necessary travel to and from school and/or accompanying their child as necessary. No dispensation will be made for parents who are working at the time their children travel to and from school or who take other children to other schools at the time their children travel to and from school. In both cases parents are expected to make other suitable arrangements for someone else to accompany their children as necessary.

The Council has a duty to ensure that suitable travel arrangements are made, where necessary, to facilitate a child's attendance at school.

- 1.4 There is no statutory entitlement to travel assistance for pre-school children. Children of pre-school age will not be provided with travel arrangements other than where they have been assessed as requiring an EHCP with specialist provision being named on the plan.
- 1.5 In support of this policy, the Council works with schools to provide safe travel routes to and from school, to encourage sustainable methods of transport, including walking and to encourage all forms of independent travel by children and young people wherever possible and practicable.
- 1.6 Where the Council has provided assistance with travel to support a child to access education, parents/carers remain responsible for their child's safety before and after these arrangements take place.
- 1.7 While parents/carers have the right to express a preference for which school they wish their child to attend, a child and young person who attends a school which is further away than their nearest suitable qualifying school that can

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<sup>8</sup> Travel to school for children of compulsory school age – January 2024

<sup>9</sup> Post-16 Transport and travel support to education and training – January 2019

meet educational need with places available, will not be eligible for travel assistance, even if the distance from home to the school they attend is more than the qualifying walking distance.

- 1.8 If the child has an Education Health and Care plan and where another provider is named on an EHC plan but the local authority is satisfied that more local provision can meet need, the cost of travel to and from the provider that is further away from home will usually be the responsibility of the parent. However, if the difference in cost of the placement (including transport) is not significant, then the local authority will support the parents' choice of school or college through travel assistance.
- 1.9 A qualifying school is taken to mean the nearest qualifying school with places available that provides education appropriate to the age, ability and aptitude of the child, and any special educational needs that the child may have.
- 1.10 Any travelling arrangements or expenses will be the responsibility of parents/carers if there is a nearer suitable qualifying school. It is the parents/carers responsibility to ensure their child gets to and from school safely and they should consider the practicalities of choosing a school that is not within the qualifying walking distance.

## **2 Responsibilities – Home to School Travel**

- 2.1 Under the Education Act 1996 (as amended by the Education and Inspections Act 2006), local authorities have a duty in certain circumstances to make such travel arrangements as they consider necessary in order to ensure that suitable home to school travel arrangements are made for the purpose of facilitating a child's attendance at relevant educational establishments for children below 6<sup>th</sup> form age.
- 2.2 In addition, local authorities also have a duty to facilitate access to full-time education for young people aged 16-19 and this may include assistance with travel in certain circumstances.
- 2.3 The family must be able to demonstrate the following:
  - Family must reside with the Borough of Bury for the duration of their course
  - College/school must be the nearest that offers the course. If the young person chooses a college further away they must demonstrate exceptional need to attend that college to be given assistance. If they cannot do so the young person will be responsible for their own costs

## **3 Application of the policy and overarching principles**

- 3.1 **Change of School Day:** The council will consider making changes to arrangements however, if additional costs are involved, the Council reserves the right to make arrangements for all or part of those costs to be charged to the school concerned.

If notification is provided in advance of a change to the school start or finish day for school events or school holidays/end of term the School and College Transport Team will endeavour to provide transport wherever possible, ensuring the effective and efficient use of resources.

If changes to the school day are made at short notice or are unplanned it may not be possible to adjust the transport arrangements however, wherever possible transport will be provided.

It should be noted that examination timetables do not constitute a change in the school day and transport will not be adjusted.

- 3.2 **Home Address:** the address where a child or young person is habitually and normally resident. Where a child/young person spends time with both parents/carers in separate homes and both have parental caring responsibility, or the home of someone who does have formal parental caring responsibility for the child the Council will treat both as the home address, providing they are within the Borough of Bury. Home to School transport may be provided to an alternative address e.g. grandparents, child-minders where this is an agreed regular arrangement. Any change in transport remains the decision of the Council taking into consideration efficient use of its resources.
- 3.3 **Mileage rate:** A mileage rate will be paid for two return journeys per day based upon the mileage determined by the Council's ICT transport data base measurement tool. This will be paid after reconciling with school attendance records. Current mileage rates are detailed in Appendix A and on the Council's website.
- 3.4 **Relevant Educational Establishment:** Section 508 B10 of the Education Act 1996 defines a relevant educational establishment as either a qualifying school or places (other than schools) where a child is receiving education by virtue of the arrangements made under section 19 (1) of the Act. Qualifying schools are community, foundation or voluntary schools; community or foundation special schools, non-maintained special schools, pupil referral units, maintained nursery schools or city technology colleges, city colleges for the technology of the arts or Academies.
- 3.5 **Statutory School Age:** children and young people aged from five years of age up to the last day of the school year when they reach 16 years of age. Following the Raising the Participation Age, young people must remain in fulltime education and training until the age of 18 years. This has not affected the definition of compulsory or statutory school age and eligibility for free school travel. Also, under the 'September guarantee', every young person aged 16 or 17 should be offered a suitable place in education or training.
- 3.6 **Statutory Walking Distance:** statutory walking distance is two miles for pupils aged up to eight and three miles for those aged eight and over. The statutory walking distance is measured by the shortest route along which a child accompanied as necessary may walk with reasonable safety. Safe walking routes are measured using the local authority's computerised mapping system as defined by the Local Land and Property Gazetteer (LLPG).
- 3.7 **Registered Support/Assistance Dogs:** Reasonable adjustments will be made in order to avoid discrimination against children and young people that may have a support/assistance dog. Suitable arrangements will be made so that a child or young person can be accompanied by their support/assistance dog on their journey.
- 3.8 **Transport for Greater Manchester**

Travel support can be obtained from Concessionary Fares operated by Transport for Greater Manchester (TfGM). 2 Piccadilly Place, Manchester. M1

3BG Telephone 0161 244 1000 general enquiries (7am to 8pm Monday to Friday, 8am to 8pm Saturday and Sunday)

Concessionary travel – is offered to disabled people, whatever their age. Depending on individual circumstances this can be free or reduced cost travel on buses, trains and the Metro link. More information is available from

[TfGM website](#) or 0161 244 1050.

Ring and Ride service provides door to door transport for people who find it very difficult or impossible to reach a bus stop or access general buses. The service is not intended for daily travel to or from college, but could help a young person with other journeys. The ring and ride service can be accessed through,

**TfGM Ring and Ride** or telephone enquiries 0845 688 4933 or 0161 200 6011, telephone bookings 0845 688 3989.

Travel voucher scheme – this is available for people who are unable to use general buses and who have serious walking difficulties or are registered blind. Vouchers are not free but are substantially discounted. If young people have any queries about the scheme they should contact TfGM details above.

#### **4 Additional Journeys**

- 4.1 **Introduction.** This section explains the Council's policy for the provision of Travel assistance for journeys additional to the normal provision at the beginning and end of the normal school working day.
- 4.2 **School Trips.** Home to school transport timings may be adjusted by the Council on request from schools to take account of connections with the departure/ arrival of educational or recreational school trips. Schools must notify such requests to the Council as early as possible to enable an assessment of any additional costs to be made. Where adjustments in timings would result in additional transport costs to the Council, schools will need to take this into account in the planning of school trips, and such costs must be reimbursed to the Council as part of the school's costing arrangements for the whole trip.
- 4.3 **Work Experience.** Transport will not be provided to enable students to undertake work experience.
- 4.4 **Induction Days/ 'Taster Days'.** Transport will not be available for children attending Induction Days or 'Taster Days' at the Council's Special Schools and resourced provisions.
- 4.5 **Reduced Timetables.** Travel assistance will be provided for children and young people attending school on a reduced timetable. If it is not possible to accommodate a reduced timetable on shared transport an alternative offer of travel assistance will be provided.
- 4.6 **Breakfast Clubs/After School Clubs.** Transport will not be provided or adjusted to enable students to attend breakfast clubs/ after school clubs that do not fulfil part of the school curriculum. However, where a child/young person attends after school club on a regular basis on a specified day parents/carers



may receive a reimbursement of mileage on the day(s) the child/young person does not access transport.

- 4.7 **Illness at School.** Transport will not be provided for students who are taken ill at school to enable them to return home. This is a parental or school responsibility.
- 4.8 **Medical/Dental Appointments.** Transport will not be provided or adjusted to enable students to attend medical or dental appointments. This is a parental responsibility.
- 4.9 **Detentions.** Transport will not be provided to take children home after detentions. This is a parental responsibility.
- 4.10 **Short Breaks / Respite.** Transport will not be provided to and from Short Breaks or respite appointments.
- 4.11 **College Attendance Whilst Registered at School.** For older children who spend a whole day at college or become dual-registered at the college whilst still being a registered pupil at a school, travel arrangements on those days may be adjusted to set down and pick up at the college, if this is possible within existing arrangements at no additional cost. If not, travel arrangements are the responsibility of the school or parent/carer. Transport arrangements for journeys during the school day to attend college placements are the responsibility of the school at which pupils are registered (for pupils with EHC Plans this will be the school named on the statement or plan).

## 5 Health and Safety

- 5.1 All wheelchairs and buggies used for passenger seating in the vehicles (ie not folded and stowed) must be crash tested and certified suitable for transport.
- 5.2 The School and College Transport team will use the Transport Information Forms completed by parents/carers each year, together with information provided by the EHC team, to inform Risk Assessments for travel arrangements for each child. The majority of children/young people will be covered by a generic Risk Assessment for transport. However, in more complex cases, a specific Risk Assessment will be undertaken. Relevant information from these Risk Assessments will be shared with transport providers to enable them to exercise their duty of care to passengers that they are transporting. Such information will be protected by GDPR regulations and the Council's contractors in accordance with agreed data protection arrangements.
- 5.3 Passenger Assistants are trained in disability awareness, safeguarding, first aid and receive additional training specific to the child's needs where necessary. However, in the event of an emergency, Passenger Assistants and drivers will contact 999 emergency services in the first instance.
- 5.4 Passenger Assistants will not be provided for children or young people requiring medical interventions throughout their journey to and from school. The council will work with health, social care and parents/carers to identify any medical needs when travelling.
- 5.5 There is no expectation that a child's/young person's routine medication will be administered on the journey to and from school, or that routine medical procedures will be carried out.
- 5.6 It may sometimes be necessary to administer a child's emergency medication. Emergency medication should be administered in accordance with instructions from a health care professional. The driver or passenger assistant responsible for

administering the medication should receive training from a health care professional.

- 5.7 It is vital that parents/carers advise the School and College Transport team of any health concerns that may affect their child whilst on transport. Such information may include details of things such as allergies, for example, even if not thought to be directly relevant to transport. This information must be included in the Transport Information Form when vehicle transport is agreed and reviewed annually, and whenever the child's needs change.
- 5.8 Children and young people are not permitted to consume food or drinks whilst on board a vehicle unless this has been agreed in exceptional circumstances by the School and College Transport team. This standard will be strictly enforced to ensure the continuing safety of all passengers whilst travelling.
- 5.9 It is the responsibility of parents/carers to ensure that arrangements are in place AM and PM to ensure the safe handover of their child to and from the care of the transport provider. The handover of children must happen at the vehicle, apart from in exceptional circumstances agreed by the School and College Transport team in advance, to ensure that the Passenger Assistant and driver can maintain the supervision and safety of other passengers.
- 5.10 In the case of extreme weather conditions, transport services may not operate. Decisions to cancel transport will be taken by the council and/or transport providers according to information provided by schools and on the basis of their own risk assessments.
- 5.11 In the case of extreme weather conditions where transport is cancelled, should a parent or carer choose to transport their child to school themselves, then it is their responsibility to undertake the return journey as well.

## **6 Journey times**

- 6.1 The Council will endeavour to ensure that pupils arrive at school fit to learn, and recognise that the length of the journey to school can affect this aim.
- 6.2 Every effort will be made to ensure a child or young person does not have to travel for more than:
- 45 minutes if they attend nursery or primary school.
  - 75 minutes if they attend secondary school.
- 6.3 Journey times may be longer where pupils are travelling to schools and colleges outside of the Borough of Bury.
- 6.4 On occasions there may be factors outside the Council's control e.g. unforeseen traffic congestion or bad weather that may affect journey times.
- 6.5 In certain circumstances it may be necessary for the Council to vary planned routes and this may affect pick up and drop off times. Where this is the case the Council or provider will endeavour to contact parents/carers in advance to advise them.
- 6.6 Pick up and drop off times affect journey times and will therefore not be altered to fit parental circumstances (for example, a parent's work schedule)

## **7 Behaviour**

- 7.1 The School and College Transport Team will work with schools to promote positive behaviour on home to school transport.
- 7.2 A child's challenging behaviour may be part of their special educational needs or disability, and they may use their behaviour to communicate their needs.

The team will work with parents, schools, contractors and passenger assistants to find positive ways of managing this behaviour where possible.

- 7.3 In certain circumstances it may be beneficial for parents/carers to inform the School and College Transport Team of any circumstances that may affect their child's behaviour on transport. For example, this may include a change in their medication, family circumstances or family bereavement.
- 7.4 Unacceptable behaviour is behaviour that may endanger the safety and wellbeing of other passengers. This may include but is not limited to assaulting another passenger, pushing and kicking, swearing, verbal abuse, bullying, distracting the driver, refusing to wear a seatbelt or refusing to remain seated. It may endanger the safety and wellbeing of other passengers.
- 7.5 Whilst the child's/young person's additional needs will always be considered, the School and College Transport Team reserves the right to refuse to provide travel assistance where a child's/young person's behaviour is such that it is unacceptable. In the first instance parents/carers will always receive a telephone call to discuss the initial concerns. Parents/Carers will receive no more than four letters;
  - (i) initially raising the concerns – confirming details of the telephone call and any strategies proposed
  - (ii) informal warning indicating the remedial steps taken and the potential of transport removal. Meeting to be arranged with school and parents to discuss further strategies that may be implemented on transport.
  - (iii) final warning indicating that transport will be removed.

The School and College Transport team will issue the fourth and final letter confirming the removal of transport, citing the reasons for the removal, the date of the proposed removal. In these cases, parents become responsible for their child's attendance at school and any transport required.

- 7.6 Travel assistance will only be withdrawn as a last resort and in these circumstances parents/carers will be offered an alternative form of travel assistance to support the child/young person accessing education.
- 7.7 Where the Council or its contractors consider that a child's / young person's behaviour is so extreme as to constitute an immediate or ongoing risk to the Health and Safety of her/himself, other service users, the vehicle crew, or members of the public, the Council reserves the right to suspend the provision of transport immediately until or unless the issue can be resolved by parents/ carers, the child's/young person's school/college, or other appropriate professionals, to the Council's satisfaction that all reasonable adjustments have been made. If a child or young person is suspended from the provision of transport in these circumstances, parents will become responsible for their child's attendance at school and the provision of any travel support required.
- 7.8 Any wilful damage that incurs cost to the transport provider for either repair or cleaning remains the responsibility of the parent/carer of the child concerned. Continued or repeat behaviour that results in wilful damage can result in withdrawal of travel assistance.
- 7.9 If parents, schools, drivers or the passenger assistant have any concerns regarding a child/young person's behaviour on transport they should inform the School and College Transport team in the first instance. All concerns will be investigated and appropriate action taken.

## **8 Absences**

- 8.1 Where a child cannot attend school on any particular day due to illness it is the parents/carers responsibility to:
- 8.2 Contact the School and College Transport Team the day before travel is required, if it is known that the child will be off school the next day or;
- 8.3 Contact the passenger assistant or contractor as early as possible in the morning of the day their child is due to travel, if the child has only just begun to show signs of illness. Please do not contact the passenger escort or contractor after 7pm in the evening or before 7am in the morning.
- 8.4 Following an absence, parents/carers must notify the School and College Transport team in order to arrange for transport to be reinstated.
- 8.5 This advice should be given on **the day before** the child is due to return to school.
- 8.6 Travel assistance will be reviewed, and may be suspended for a period of time or permanently withdrawn, if it becomes apparent that transport is not being cancelled with reasonable advance warning. Parents/carers will be responsible for ensuring their child's regular attendance at school in such circumstances.

## **9 Safeguarding Children and Young People**

- 9.1 All children and young people will be handed over to a responsible adult at the drop off address within the Borough of Bury, provided by parent/carer. Drivers and Passenger Assistants are not permitted to leave children and young people with any person under the age of 16 or who is not an 'authorised' adult.
- 9.2 Prior to starting transport, the School and College Transport Team will request details of any authorised adult and/or emergency contact details for any person who a child or young person can be handed over to in the event of an emergency. Parents/Carers are required to inform the team of any changes to contact details.
- 9.3 A child or young person must never be removed from a vehicle anywhere on a route other than at the normal setting down point for that journey. The only exceptions to this would be long distance journeys, when it is necessary to make pre-agreed rest stops, or in emergencies.

## **10. Service Standards**

- 10.1 The School and College Transport team is responsible for arranging and overseeing all agreed methods of travel assistance provided to pupils with or without an EHC Plan. Travel assistance will be provided according to the agreed school placement arrangements (e.g. daily, fortnightly, or in the case of 52-week provision at the start and end of the placement only). The responsibilities of the School and College Transport team include, but are not limited to;
  - Implementing agreed travel assistance, e.g. allocating suitable routes and pick-up and drop-off points
  - Day to day amendments/queries relating to travel arrangements
  - Managing provider contracts
  - Managing contracts with licensed transport providers
  - Managing in-house transport services provided by Bury Council Transport
  - Monitoring of transport providers

- Investigating and responding to complaints about transport services

10.2 The service standards described below act as guidance and clarity for the service users for who travel assistance is provided. Underlying these standards is the principle that, if the Council agrees to provide travel arrangements, it will be provided in a safe, suitable and cost-effective manner, taking account of the child's specific needs and with regard to the best use of the Council's resources.

## **11 Vehicles**

- 11.1 All transport will be provided in accordance with contractual standards and legislation.
- 11.2 All vehicles will be properly licensed in accordance with local regulation and national legislation.
- 11.3 The Council will conduct regular monitoring of quality and service standards on all vehicles operated by the Council or its contractors.
- 11.4 Vehicles will have specialist wheelchair access and wheelchair restraint systems where necessary.
- 11.5 All vehicles will be road worthy, clean inside and out, fitted with seat belts and carry emergency equipment i.e. fire extinguisher and first aid kit and any other equipment/notices required by law, e.g. children sign on front and back of vehicle.

## **12 Passenger Assistants**

- 12.1 The Council may provide a Passenger Assistant for children and young people who have severe physical or learning disabilities and/or challenging behaviours and where the child's safety requires it, and as determined during the assessment phase.
- 12.2 All Passenger Assistants must be compassionate of the needs of the child/young person and their family.
- 12.3 Passenger Assistants are expected to be seated in the rear of the vehicle with a view of all children/young people travelling.
- 12.4 Passenger Assistants are trained in disability awareness, safeguarding, first aid and receive additional training specific to the child's needs where necessary.
- 12.5 The need for a Passenger Assistant will be reviewed annually as part of the child's/young person's annual review.
- 12.6 Passenger Assistants will not be provided where parents/carers make their own travel arrangements.
- 12.7 Where provided, the Council will make every effort to ensure the same Passenger Assistant is used on a regular basis. This may not always be possible due to staff shortages, illness, holidays, retirement and staff resignations. Changes may also be necessary from time to time to ensure the efficient use of resources.
- 12.8 The Passenger Assistant should assist children on and off the vehicle and ensure they are seated safely while the vehicle is moving.
- 12.9 Passenger Assistants must treat parents/carers and children with respect and avoid confrontations. It is also expected that parents/carers will treat the passenger assistants with respect and consideration.

- 12.10 Passenger Assistants should deliver children to a member of school staff on arrival at the school so that at no time are children left unattended on the vehicle.
- 12.11 If the Passenger Assistant has a concern for any child in their care, the Head Teacher and the School and College Transport Team will be informed.
- 12.12 Passenger Assistants are not authorised to leave a child with anyone other than their parent/carer or named responsible adult (16+) identified in advance to the School and College Transport team in writing by the parent/carer.
- 12.13 All Passenger Assistants will have enhanced Disclosure and Barring Service (DBS) clearance.
- 12.14 Passenger Assistants must carry and display suitable identification at all times.
- 12.15 Passenger Assistants must adhere to the Council's no smoking policy.
- 12.16 Passenger Assistants have strict instructions not to enter into any personal arrangements with parents/carers, including changing pick up or drop off points without consulting the Council.
- 12.17 If parents/carers, schools or driver have any concerns regarding a Passenger Assistant they should inform the School and College Transport team in the first instance. All concerns will be investigated and appropriate action taken.

### **13 Drivers**

- 13.1 All drivers must be compassionate of the needs of the child/young person and their family.
- 13.2 Drivers must carry and display suitable identification at all times.
- 13.3 Drivers must have enhanced DBS clearance.
- 13.4 All drivers undertake safeguarding training and where required wheelchair restraint training.
- 13.5 All drivers must hold a relevant licence for the type of vehicle they are operating. Taxi/Private Hire Drivers will be licensed by Bury Council
- 13.6 Drivers must, as far as possible, be punctual.
- 13.7 Drivers must ensure that all wheelchairs are securely restrained.
- 13.8 Drivers must treat parents and children with respect and avoid confrontations. It is also expected that parents/carers will treat the drivers with respect and consideration.
- 13.9 Drivers must report any poor behaviour of passengers to their supervisor to relay onto the School and College Transport Team. Also to the school and parent as necessary.
- 13.10 Drivers must ensure that all passenger harness and safety straps are properly adjusted and fitted securely before the journey commences.
- 13.11 Drivers must adhere to the Council's no smoking policy.
- 13.12 The driver is to stop, as close to the home address or collection point as traffic conditions will safely permit.
- 13.13 The driver is not allowed to sound their horn to alert parents that they are there.

- 13.14 Neither drivers nor Passenger Assistants are responsible for taking a child across the road if a parent/carer is waiting on the other side.
- 13.15 If parents/carers, schools or Passenger Assistants have any concerns regarding a driver they should inform the School and College Transport team in the first instance. All concerns will be investigated, and appropriate action taken.

#### **14 Vehicle Waiting Times (Mornings)**

- 14.1 Parents/carers are expected to be available at home or at an agreed collection point, at an agreed time to meet transport in the morning.
- 14.2 To keep journey times down to an absolute minimum and ensure that all pupils arrive at school on time, all vehicles will adhere to strict waiting time limits as follows:
- 14.3 If a child is not ready, or not at the agreed collection point, the vehicle will wait for a maximum of 3 minutes after the agreed pick up time and then move off. If this means the child is unable to travel on the organised vehicle, the parent/carer is then responsible for ensuring that the child gets to school on time.
- 14.4 If the vehicle arrives early for a pick-up it will wait until the official set time and then a maximum of 3 minutes before moving off. If this means the child is unable to travel on the organised vehicle, the parent/carer is then responsible for ensuring that the child gets to school on time.
- 14.5 If there is a temporary change to the pick up time due to a passenger not travelling the contractor/driver/passenger assistant will inform parents of the revised pick up time.
- 14.6 If the vehicle is running late for a pickup, the passenger assistant is expected to advise parents/carers of the delay as soon as possible. When a vehicle arrives at a family home or collection point, the horn will **not** be sounded. Parents/carers are expected to have their child ready and waiting to board the vehicle.
- 14.7 If a child/young person is not available for pick up within the time limits given above, for any reason, and no prior cancellation of the transport requirement has been received by the Council, this will be considered as a 'no show' and parents/carers will be advised accordingly. If 3 'no shows' are recorded during the Academic Year transport will be withdrawn and parents/carers will be responsible for the child/young person's attendance at school and any transport required.
- 14.8 Where it is known that a child/young person may experience additional difficulties or anxieties around the morning pick up time strategies can be implemented to support the family. This can include the driver or passenger assistant calling/texting the family to advise they are on their way.

#### **15 Vehicle Waiting Times (Afternoons)**

- 15.1 Parents/carers must be available at home or the nominated delivery point, at the regular drop off time, every afternoon to meet their child. Drivers cannot wait for parents as they often have other duties to fulfil and any delays can cause anxiety for other families.
- 15.2 Parents/carers must provide emergency contact details.
- 15.3 In the event that a parent/carer is unable to meet their child at the specified time and location, the emergency contact details will be used. If unsuccessful

and as a final resort, the child will be taken to a place of safety and the parent/carer will be notified. It will then be the parents/carers responsibility to collect from that place.

- 15.4 On occasion, parents/carers may need to make emergency alternative arrangements for the handover of their child to a nominated responsible adult, either at the home address or at an alternative address within the Borough of Bury. In these cases it is the parent/carer's responsibility to notify the School and College Transport team and make suitable arrangements to ensure their child's safety.
- 15.5 Where transport is delayed by 15 minutes or more parents will be notified by the passenger assistant, driver or the School and College Transport Team.
- 15.6 In circumstances where vehicles are delayed or late arriving the parent/carer should contact the School and College Transport team. The team will take steps to directly address the situation with the provider.
- 15.7 Where no responsible adult is available to meet a child from transport on more than two occurrences, travel assistance will be reviewed and may be suspended or permanently withdrawn. In these cases, the parents/carers will receive no more than four letters
  - (i) initially raising the concerns
  - (ii) informal warning indicating the remedial steps taken and the potential of transport removal
  - (iii) final warning indicating that transport will be removed.

The School and College Transport team will issue a fourth and final letter confirming the removal of transport, citing the reasons for the removal, the date of the proposed removal and the parental route of appeal. In these cases, parents/carers become responsible for their child's attendance at school and any transport required.

## **16 Raising Concerns/Complaints**

Once travel assistance has been agreed any concerns regarding the provision of the service should be made in the first instance to the School and College Transport team on 0161 253 6968 or by email [schoolandcollegetransport@bury.gov.uk](mailto:schoolandcollegetransport@bury.gov.uk)

All concerns will be investigated with the relevant parties and appropriate action taken.

If you remain dissatisfied with the outcome you can make a formal complaint. All complaints will follow the council's corporate complaints procedure. Full details are available on the Council website, [www.bury.gov.uk](http://www.bury.gov.uk).

Any complaints regarding the outcome of the assessment process should be addressed as part of the appeals process explained in section D of this policy.

## **17 Glossary**

Parent: birth parent, care, foster parent, adoptive parent, guardian.

Child: a pupil of compulsory school age (5-16 years) or a 3 to 4 year old attending specialist nursery/school provision.



Sixth form age: a young person aged 16-18 who starts a course of study before their 19<sup>th</sup> birthday at a sixth form or college, possibly continuing up to the age of 25 if the young person has an Education, Health & Care plan.

Adult learner: a person who starts a course of study after their 19<sup>th</sup> birthday and who, in the case of a young adult', will have an Education, Health and Care plan.

## **SECTION D Appeals**

If an application for travel assistance is not approved by the Council, or the parent/carer disagrees with the type of assistance being offered, parent/carers have a right of appeal. The appeal should be made in writing within fifteen working days of the decision letter being received by the parents/carers.

Appeals are administered in two stages:

### **Stage 1: Review by Transport & Contract Manager**

Within five working days of the appeal form being received, the parent/carer will be sent confirmation that their appeal has been received and that their appeal is under review.

Further evidence may be requested to support the appeal and consultation with case workers and professional bodies may be required. Stage 1 appeals are decided by the Transport & Contracts Manager. Parents should receive their decision letter within twenty working days of their appeal form being received.

### **Stage 2: Independent Panel - Independent Review of Evidence**

If the parent/carer remains dissatisfied with the outcome, they should notify the Council in writing within 20 working days of receiving their Stage 1 appeal decision making clear the grounds on which they still wish to appeal.

The appeal will then be considered independently of the School and College Transport service and will involve consideration of all evidence gathered and the reasons for the decision being made. This will be undertaken by the multi-agency "Independent Panel," independent of the process to date and suitably experienced; this may include participation by head teachers from primary and secondary schools and members from the community and voluntary sector.

Parents/Carers will be invited to attend an appeal hearing, virtually or in person, to present their case. Where a parent does not wish or is unable to attend a hearing, the panel will make their decision based on written representations from the parent/carer.

The review will take place within 40 working days of the parent notifying the Council of their wish to escalate their appeal to stage 2.

Parents should receive their decision letter within five working days of the Council completing its considerations.

This decision is the final stage of the Council's appeal procedure in relation to travel assistance. If parents/carers remain dissatisfied they can complain to the Local Government Ombudsman. Details can be provided by the Council if necessary.

During the appeals process no new travel arrangements will be provided or, in the case of existing arrangements, no change will be implemented.

If after the appeal, travel assistance is agreed, it will commence from the date of the letter sent to the parent / carer. No backdated payments will be made nor will the Council accept any claims by parents/carers for costs incurred (e.g. for making alternative transport during the process of appeal).



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**Department for Children Young People and Culture**

**Travel arrangements between home and  
school or college for pupils and young  
people with Special Educational Needs  
and Disability**

## **HOME TO SCHOOL AND COLLEGE TRAVEL ARRANGEMENTS POLICY FOR CHILDREN AND YOUNG PEOPLE WITH SPECIAL EDUCATIONAL NEEDS**

### **1. INTRODUCTION**

- 1.1 This policy outlines the travel support available for children and young people with Special Educational Needs and Disabilities (SEND) living within the boundaries of Bury Council to access education.
- 1.2 The aim of the Council's travel arrangements policy is to ensure that all children and young people should lead lives that are independent and as free from restriction as possible, thereby contributing to the vision, purpose and values of Bury Council.

#### **Our Vision, Purpose and Values**

- 1.3 The provision of travel arrangements by the Council will be based on individual needs and circumstances and with regard to the efficient use of resources.
- 1.4 This policy is set out in four sections as follows:

#### **SECTION A**

- Children attending a mainstream or special school with a Statement of Special Educational Needs or Education, Health and Care Plan.
- Children attending a mainstream school or specialist unit within a mainstream school who have additional learning or mobility difficulties without a Statement of Special Educational Needs or Education, Health and Care Plan.

#### **SECTION B**

- Young people 16 to 25 years with SEND as detailed within section B

#### **SECTION C**

- Appeals procedure

#### **SECTION D**

- Appendices of definitions and additional information about the terms used in this policy

- 1.5 Wherever possible, in the provision of travel arrangements, the Council will consider travel options that lead to reducing the number and length of vehicle journeys.
- 1.6 This policy explains:
- Who is eligible for travel arrangements from Bury Council
  - The statutory basis for the provision of travel arrangements by local authorities.
  - What kind of travel arrangements may be provided.
  - How applications for travel arrangements are made and assessed, and how parents/carers can appeal against decisions made by the Council
  - The Council's transport service standards.

## **SECTION A**

**2. This policy relates to Travel arrangements for children and young people with significant Special Educational Needs and Disability, which will usually mean those with an Education, Health and Care (EHC) Plan or a statement of special needs (SEND). It may also apply to those who are undergoing assessment for an EHC plan or have been placed by the Authority in a school, to meet their SEND that is not their local catchment school. Travel arrangements will be determined by reference to the individual child's needs.**

2.1 Where it is not possible for a pupil to attend a school near to their home because the school is unable to meet their additional needs, travel arrangements will be provided.

2.2 Travel arrangements will be provided for pupils who, because of their special educational needs, disability or mobility difficulties, cannot reasonably be expected to walk to school<sup>22</sup>.

2.3 There is a general expectation that a child will be accompanied by a parent where necessary, unless there is good reason why it is not reasonable to expect the parent to do so.

2.4 The Council reserves the right to make an assessment to determine eligibility for travel arrangements under this policy.<sup>23</sup>

**3. Other factors that may be taken into consideration when assessing a child or young person's eligibility for arrangements with travel.**

3.1 Where the parent/carer of the child or young person has a disability, the local authority is under a duty to make reasonable adjustments if the usual application of this travel arrangements policy places a disabled person at a substantial disadvantage in comparison with persons who are not disabled..

3.2 Where parents/carers receive the Mobility Component of Disability Living Allowance (or Personal Independence Payments from June 2013) on behalf of the child, and/or a car is provided for them under the Motability Scheme, Parents may consent to transport their child or young person themselves and consideration may be given to the payment of an agreed mileage rate for parents/carers. Payments in lieu of arranged transport will only be made with the consent of a parent.

3.3 Any other personal circumstances applicable to each case.

**4. Factors not taken into consideration**

4.1 When assessing eligibility for travel assistance, the Council, in common with other local authorities will generally not take the following factors into account:

4.1.1 Personal circumstances such as parents/ carers attending work, taking other children into other schools or looking after other children, unless there is a sibling or another child within the household with Special Educational Needs or Disabilities;

4.1.2 Parental preference for a school named in part 4 of a statement of special educational needs or section I of a EHC plan, where the local authority

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<sup>22</sup> Paragraph 30, Home to School Travel and Transport Guidance, July 2014.

<sup>23</sup> Section 508B, Education Act 1996.

considers that there is a suitable school nearer to the child or young person's home and that school is also named in Part 4 of the statement or section I of a plan. In such cases it will be open to the Council to include reference to the parents/carers accepting responsibility for all travel arrangements to the preferred school, and associated costs, in part 4/section I.

4.1.3 Travel arrangements will not be provided for the following

- Children or young people taken ill during the day;
- any type of appointments including medical or any other specialists;
- Children or young people who have been excluded during the school day;
- breakfast or after school clubs;

The Council's policy on the provision of travel arrangements for additional journeys is described in more detail at Section D.

**5. What travel arrangements may be offered**

- 5.1 Once a child's eligibility for travel arrangements has been agreed, the Council will decide what type of arrangements will be offered. This decision will be based on the identified needs of the individual child or young person and will take account of the Council's duties to make the best use of its resources. It should be noted that the mode of travel arrangements offered will be reviewed at least annually and may change as the needs of the child or young person change, whilst continuing to ensure the best use of the Council's resources.
- 5.2 For children attending school on a daily basis, travel arrangements will usually only be provided for the beginning and end of the school day. Transport will not usually be provided or adjusted for children to attend breakfast clubs/after school clubs that do not fulfil part of the school curriculum.
- 5.3 A child boarding on a weekly basis where the school is closed at weekends will be provided with travel arrangements at the beginning and end of the school week, other periods of closure and during term time only. A child boarding on a termly placement where the school is not closed at weekends will be provided with travel arrangements limited to the start and end of the school term, half terms and for periods of whole school closure only. Any other journeys required will be the responsibility of parents/carers including attendance at annual reviews, additional home visits at weekends or any other time.
- 5.4 The Council's policy on the provision of travel arrangements for additional journeys in various circumstances is explained in Section D.
- 5.5 The Council will always consider forms of travel arrangements that help to develop travel independence skills to enable children and young people to lead independent lives as they grow older.
- 5.6 The options that will be considered when assessing the travel arrangements that will be provided will include, but are not limited to:
- 5.6.1 **Independent travel training:** independent travel training, focuses on the needs and capabilities of the pupil, and is delivered through working closely with parents/carers and school staff. It can enhance the young person's



confidence and independence by developing personal, social and life skills. Independent travel training will also develop young people's resilience against bullying and abuse when using public transport. Criteria for successful completion of the training will be based on an agreed comprehensive training programme and a copy of the final assessment will be provided to parents/carers. Successful completion of Independent Travel Training will be signed-off by the Council and parents/carers

All applications for travel arrangements will be reviewed to determine if an assessment for independent travel training should take place. This assessment process is undertaken by a qualified Travel Trainer and involves contributions from the young person and their parents, school staff and other professionals. It is expected that where independent travel training is offered as a travel solution, a young person will take this up.

Top up training will be available to support children and young people with transition when moving schools and on social routes during school holidays.

- 5.6.2 **Mileage rate:** The council will re-imburse parents a mileage rate if they choose to transport their child/young person to school in their own vehicle.
- 5.6.3 **Personal Travel Budget (PTB):** It may be possible for the Council to provide parents/carers with an amount of money to enable them to provide personalised travel arrangements that best and most flexibly suit the needs of their child and family. The sum provided will be at the discretion of the Council; it will be based on the distance travelled from home to school, and will not exceed the cost of direct provision of transport by the Council, or a share of that cost where the child would otherwise travel with other children in a shared vehicle. It is parents'/carers' responsibility to ensure that travel arrangements made by them are safe and accessible and that school attendance is maintained. A PTB can be refused or withdrawn if these conditions are not met.
- 5.6.4 **Transport vehicles:** Where assessed as required, the Council may provide a vehicle to transport a child provided they are eligible children and assessed to require transport. Where transport vehicles are provided, these will be either Council vehicles and drivers or those provided by a suitably qualified and licensed commercial provider working to contractual standards set by the Council. This may be picked up and dropped off at a convenient location, within a reasonable distance from their home, in many cases from a recognised pick up and drop off point. A home pick up and drop off will only be made where it is deemed essential due to the child and young person's significant need. Whenever possible, children will travel together in buses. These will be specially adapted to meet the needs of those travelling on them. Each route will be planned on the basis of school start and finish times and the shortest possible route for all children travelling on a particular vehicle. Under very exceptional circumstances the Council may transport pupils in separate taxis or private hire vehicles based on the assessed needs of the child or young person. Arrangements of this kind will be kept under regular review and, where possible, the opportunity will be taken to move to an alternative suitable form of travel assistance.
- 5.6.5 **Travel pass:** To enable the child/young person to travel to school accompanied, if necessary, by an adult via public transport solutions.

## **6. Vehicle transport service standards and provision of passenger assistants**

- 6.1 The vehicle transport service provided by the Council for children and young people will operate to the service standards described at Section D.
- 6.2 In some circumstances where the Council has assessed that there is a need a Passenger assistant may be provided to accompany pupils to school on transport provided by the Council. Passenger Assistants will only be provided where they are necessary for the safe operation of vehicles and/or the care of children or young people. A Passenger Assistant will not necessarily be provided simply because the pupil is school-aged or because he/she does not know the driver.
- 6.3 Assistance with travel will be provided to meet the needs of a child/young person there may be circumstances when the transport will need to be reviewed as it is not working. While it is acknowledged that the child/young person has SEND and this may impact upon their behaviour, if the conduct of the child/young person compromises the safety of anyone travelling with them, the Council reserves the right to suspend or withdraw the transport provision. In these cases the Council will work with the family to try to find another travel solution for the child/young person. See Section D

## **7. Application and assessment process (all applicants)**

- 7.1 Applications for travel arrangements will be given full consideration to the specific needs of the child or young person. Where it is decided travel arrangements is appropriate it will be implemented as soon as possible following the decision. In a situation where a new contract and/or a passenger assistant needs to be procured this time scale may be longer in order to fulfil procurement and recruitment processes.
- 7.2 The application process is dealt with in three stages.

### **Stage 1: Application**

For a child with a Statement of SEN or an EHC Plan, the Council will undertake an initial assessment of travel requirements based on the school placement proposed. Where this assessment indicates that the child is not eligible for travel arrangements, parents/carers will be advised accordingly and will have a right to appeal against this decision see Section C.

For all applicants (with or without a Statement of SEN or EHC Plan), the parent/carer must make a formal application for travel support before any assistance is considered. Supplementary evidence of the child's need for travel arrangements should be provided by parents/carers at this stage. Application forms can be obtained from the Bury Council website [www.bury.gov.uk](http://www.bury.gov.uk) or by telephoning the School and College Transport team on 0161 253 6968 or emailing [schoolandcollegetransport@bury.gov.uk](mailto:schoolandcollegetransport@bury.gov.uk). Applications will be acknowledged within five working days on receipt of the application. An initial evaluation of the application will then determine whether assistance is likely to be approved, declined or whether further assessment is required. The parent/carer will be informed in writing of the outcome of the application.

## **Stage 2: Assessment**

This stage will include the evaluation of written evidence and family circumstances. It could lead to an assessment for independent travel training which would include a home visit, consultation with the child or young person's school/caseworkers and any other relevant specialists.

This initial evaluation will be completed within fifteen working days following Stage 1 depending on the complexity of the circumstances. If further evidence is required/requested or an assessment for independent travel training needs to be undertaken, parents/carers will be notified in writing within ten working days, of the initial notification unless for reasons outside the Council's control it is not possible to do so within that time, in which case it will be done as soon as reasonably practicable after that. It is possible at this stage that the application may be declined and parents/carers may appeal against such a decision if they wish.

## **Stage 3: Implementation**

Where the Council agrees to provide travel arrangements it will also decide what type of travel arrangements would be suitable and appropriate to meet the needs of the child. The parent/carer will be requested to sign an agreement before the travel arrangements are provided and the agreed arrangements will normally be implemented within ten working days following the completion of the assessment stage. If a parent/carer does not accept the travel arrangements offered by the Council, their application will be withdrawn and they will need to take responsibility for their child's attendance at school themselves.

If travel arrangements are granted for a limited period, parents/carers will be required to submit a new application, or to provide further information, in order to secure continued assistance. At any point throughout the application process you have the right to appeal as detailed in Section C.

## **8 Travel arrangements Review**

- 8.1 All children and young people's eligibility for travel arrangements will be reviewed regularly and at least annually. For children and young people with EHC Plans or Statements, their continued eligibility for travel arrangements will be discussed at the child or young person's school at the same time as the annual review. Parents/carers should attend the review in order to consider whether or not travel arrangements continue to be appropriate. For pupils with SEN, but without an EHC plan or Statement, or where travel arrangements have been granted on a time-limited basis further information will be sought prior to the end of the agreed assistance period to enable a timely review to take place. The Council may also review eligibility for travel arrangements this may be by means of a scheduled meeting or via telephone contact. If parents/carers do not participate in these reviews it may result in travel arrangements being withdrawn. Parents/carers will be informed of all decisions in writing, including notification of the right to appeal.
- 8.2 Travel arrangements will also be reviewed when there is a significant change in circumstances, such as a change in home address, school or a change in the child's or young person's needs. It is the responsibility of the parent/carer to notify the Council immediately of any changes that may affect the provision of travel arrangements.

- 8.3 Any changes will be implemented from the beginning of the next half school term / school term or sooner where possible.

**Cessation of Support**

- 8.4 The Council will review and remove travel arrangements where the child or young person's individual circumstances have changed and either the child or young person is no longer eligible for support, or the child or young person has been assessed as not requiring such support. Assistance may also cease on the request of the parent/carers who may have made alternative arrangements for their child's or young person's travel to school.

## Section B Post 16 Travel

1. Local Authorities have a duty to facilitate access to full-time education for all young people aged 16 -18 years <sup>24</sup> and those continuing learners who started their programme of learning before their 19<sup>th</sup> birthday and this may include assistance with travel in certain circumstances. Under Raising the Participation Age Agenda, young people must remain in full time education and training until the age of 18 years.
2. In line with the Local Authority's duty under the Education and Skills Act 2008 to encourage, enable and assist participation of learners with learning difficulties in education and learning, this policy will apply, in some cases to young people up to the age of 25 subject to an individual assessment of need
3. In line with the Children and Families Act 2014 and as part of the SEND reforms, it is expected that young people will work towards independence from the earliest opportunities both at home and through their educational placement. The majority of young people who will attend college will be able to travel independently and for those who cannot, opportunities for this to take place should be maximised, through a range of providers.
4. Unless there is an individual assessment of need for assistance with travel the responsibility for travel to and from college rests with the young person and their family. There are a number of travel options available within the local community that young people can access. Alternative travel options are listed at [Annex A](#)
5. Travel arrangements may be provided for young people over 16 years with special educational needs who are attending a full time course at the nearest provision to their home. Where an out of area provider is chosen, travel arrangements will not be provided. Where an out of area provider is named on an EHC Plan and the Local Authority is satisfied that local provision can meet need, travel to and from the provider will be the responsibility of the young person and/or their family. Assistance will not be provided for passenger assistants or for students undertaking a residential course.
6. Travel support is not available for trips, work experience or any other activity associated with the college course. Arrangements should be discussed directly with the college.
7. A contribution towards the cost of transport will be sought from the parent/carer or if over 18 years, the individual themselves. Charges will not exceed the cost of a bus pass for student's age 16 to 26 yrs. The likely duration of the learning will also be taken into account. This will be recharged at the end of each half term and will be recharged at the same rate as the online cost of a monthly System One Student Bus Saver Ticket.
8. The options that will be considered when assessing the travel arrangements that will be provided will include, but are not limited to:
  - 8.1 **Independent Travel Training**, All young people will be supported and encouraged to travel independently to and from college, when it is assessed as reasonable for them to do so. This assessment process is undertaken by a

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<sup>24</sup> Section 509AC of the Education Act 1996 defines persons of sixth form age for the purposes of the sixth form transport duty.

qualified Travel Trainer and involves contributions from the young person and their parents, school staff and other professionals. It is expected that where independent travel training is offered as a travel solution, a young person will take up this offer.

Top up training will be available to support young people with transition when moving to college.

- 8.2 **Personal Travel Budget (PTB)**, it may be possible for the Council to provide the young person or their parent/carers with an amount of money to enable them to provide personalised travel arrangements. The sum provided will be at the discretion of the Council; it will be based on the distance travelled from home to school/college and will not exceed the cost of direct provision of transport by the Council, or a share of the cost where the young person would otherwise travel with other students in a shared vehicle. It is the young person or their parent/carers' responsibility to ensure that travel arrangements made by them are safe and accessible and that school attendance is maintained. A PTB can be refused or withdrawn if these conditions are not met.
- 8.3 **Supported public transport**, it may be possible for a young person to travel on public transport if the young person has some assistance. Where parents/carers are unable to accompany their son/daughter themselves and they would have to provide a personal assistant/escort or college may be able to arrange for one of their peers to act as a travel buddy. The young person would be eligible for free travel by using their concessionary pass from TfGM.
- 8.4 **Travel vehicles**, in exceptional circumstances the Council may provide a vehicle to transfer a pupil from home to college. Wherever possible young people will travel together they may be collected and dropped off at a convenient location, within reasonable distance of their home. A home pick up and drop off will only be made where it is deemed essential due to the young person's significant needs. If a young person requires an escort on their journey this will be the responsibility of the parents / carers unless there is an individual assessment of need for an escort.

## **SECTION C Appeals**

If an application for travel arrangements is not approved by the Council, or the parent/carer disagrees with the type of arrangements being offered, parent/carers have a right of appeal. The appeal should be made in writing within fifteen working days of the decision letter being received by the parents/carers.

Appeals are administered in two stages:

### **Stage 1: Review by Head of Service**

Within five working days of the appeal form being received, the parent/carer will be sent confirmation that their appeal has been received and that their appeal is under review.

Further evidence may be requested to support the appeal and consultation with case workers and professional bodies may be required. Stage 1 appeals are decided by the Head of Service. Parents should receive their decision letter within twenty working days of their appeal form being received.

### **Stage 2: Independent Panel - Independent Review of Evidence**

If the parent/carer remains dissatisfied with the outcome, they should notify the Council in writing within 20 working days of receiving their Stage 1 appeal decision making clear the grounds on which they still wish to appeal.

The appeal will then be considered independently of the School and College Transport service and will involve consideration of all evidence gathered and the reasons for the decision being made. This will be undertaken by the multi-agency "Independent Panel," independent of the process to date and suitably experienced; this may include participation by head teachers from primary and secondary schools and members from the community and voluntary sector.

Parents should receive their decision letter within forty working days of their appeal being received.

This decision is the final stage of the Council's appeal procedure in relation to travel arrangements. If parents/carers remain dissatisfied they can complain to the Local Government Ombudsman. Details can be provided by the Council if necessary.

During the appeals process no new travel arrangements will be provided or, in the case of existing arrangements, no change will be implemented.

If after the appeal, travel arrangements are agreed, it will commence from the date of the letter sent to the parent / carer. No backdated payments will be made nor will the Council accept any claims by parents/carers for costs incurred (e.g. for making alternative transport during the process of appeal).

## **Complaints**

Once travel arrangements have been agreed any concerns regarding the provision of the service should be made in the first instance to the School and College Transport team.

All complaints on the process for assessing eligibility for transport provision will be handled through the Council's formal complaints process. Full details are available on the Council website. Complaints regarding the outcome of the assessment process will be addressed as part of the appeals process as described above and should be sent to:

Head of Service  
School & College Transport Team  
The Department for Children, Young People & Culture  
Bury Council  
3 Knowsley Place  
Duke Street  
Bury  
BL9 0EJ



## **SECTION D:**

### **1. Legislation and responsibilities home to school travel**

- 1.1 Parents/carers are responsible for ensuring that their children attend school regularly under s.444 of the Education Act 1996 (as amended). This includes arranging any necessary travel to and from school and/or accompanying their child as necessary. No dispensation will be made for parents who are working at the time their children travel to and from school or who take other children to other schools at the time their children travel to and from school. In both cases parents are expected to make other suitable arrangements for someone else to accompany their children as necessary.

The Council has a duty to ensure that suitable travel arrangements are made, where necessary, to facilitate a child's attendance at school.

- 1.2 There is no statutory entitlement to travel arrangements for pre-school children. Children of pre-school age will not be provided with travel arrangements other than in exceptional circumstances.
- 1.3 In support of this policy, the Council works with schools to provide safe travel routes to and from school, to encourage sustainable methods of transport, including walking and cycling, and to encourage all forms of independent travel by children and young people wherever possible and practicable.
- 1.4 This policy has been developed with full regard to the Department for Education Guidance on Home to School Travel and Transport

#### **Home to school travel and transport guidance**

#### **Post 16 travel and transport guidance**

- 1.5 Parents/carers are responsible for their child's safety while travelling to and from school. Where the Council has provided assistance with travel to support a child access education, parents/carers remain responsible for their child's safety before and after these arrangements take place.
- 1.6 While parents/carers have the right to express a preference for which school they wish their child to attend, a child and young person who attends a school which is further away than their nearest suitable qualifying school with places available, will not be eligible for travel arrangements, except in exceptional circumstances, even if the distance from home to the school they attend is more than the qualifying walking distance.
- 1.7 A qualifying school is taken to mean the nearest qualifying school with places available that provides education appropriate to the age, ability and aptitude of the child, and any special educational needs that the child may have.
- 1.8 Any travelling arrangements or expenses will be the responsibility of parents/carers if there is a nearer suitable qualifying school. It is the parents/carers responsibility to ensure their child gets to and from school safely and they should consider the practicalities of choosing a school that is not within the qualifying walking distance.

## **2. Legislation and responsibilities home to college travel**

- 2.1 Under the Education Act 1996 (as amended by the Education and Inspections Act 2006), local authorities have a duty in certain circumstances to make such travel arrangements as they consider necessary in order to ensure that suitable home to school travel arrangements are made for the purpose of facilitating a child's attendance at relevant educational establishments for children below 6<sup>th</sup> form age.
- 2.2 In addition, local authorities also have a duty to facilitate access to full-time education for young people aged 16-19 and this may include assistance with travel in certain circumstances.
- 2.3 The family must be able to demonstrate the following:
- Family must reside with the Borough of Bury for the duration of their course
  - College/school must be the nearest that offers the course. If the young person chooses a college further away they must demonstrate exceptional need to attend that college to be given assistance. If they cannot do so the young person will be responsible for their own costs

## **3 Additional Information**

- 3.1 **Change of School Day:** The council will consider making changes to arrangements however, if additional costs are involved, the Council reserves the right to make arrangements for all or part of those costs to be charged to the school concerned.

If there is a change to time of the school start or finish day for school events or school holidays transport will not be provided.

It should be noted that examination timetables do not constitute a change in the school day.

- 3.2 **Exceptional Circumstances:** Each case will be submitted and considered on its own merits by the Statutory Assessment Panel.
- 3.3 **Home Address:** the address where he or she is habitually and normally resident. Where a child spends time with both parents/carers in separate homes and both have parental caring responsibility, or the home of someone who does have formal parental caring responsibility for the child the Council will treat both as the home address, providing they are within the Borough of Bury. Home to School transport is not provided to alternative addresses e.g. grandparents, child-minders. Any change in transport remains the decision of the Council.
- 3.4 **Low Income Families:** Children whose parents are in receipt of the maximum level of working tax credit or children who are entitled to free school meals. For those families in receipt of Universal Credit the statutory guidelines for eligibility as low income will be followed.
- 3.5 **Mileage rate:** A mileage rate of forty four pence per mile will be paid for the return journey based upon the mileage determined by the Council's ICT transport data base measurement tool. This will be paid after reconciling with school attendance records.
- 3.6 **Relevant Educational Establishment:** Section 508 B10 of the Education Act 1996 defines a relevant educational establishment as either a qualifying school or places (other than schools) where a child is receiving education by

virtue of the arrangements made under section 19 (1) of the Act. Qualifying schools are community, foundation or voluntary schools; community or foundation special schools, non-maintained special schools, pupil referral units, maintained nursery schools or city technology colleges, city colleges for the technology of the arts or Academies.

3.7 **Statutory School Age:** children and young people aged from five years of age up to the last day of the school year when they reach 16 years of age. Under Raising the Participation Age Agenda, young people must remain in fulltime education and training until the age of 18 years.

3.8 **Statutory Walking Distance:** statutory walking distance is two miles for pupils aged up to eight and three miles for those aged eight and over. The statutory walking distance is measured by the shortest route along which a child accompanied as necessary may walk with reasonable safety. Walking routes are measured using the local authority's computerised mapping system as defined by the Local Land and Property Gazetteer (LLPG).

### 3.9 **Transport for Greater Manchester**

Travel support can be obtained from Concessionary Fares operated by Transport for Greater Manchester (TfGM). 2 Piccadilly Place, Manchester. M1 3BG Telephone 0161 244 1000 general enquiries (7am to 8pm Monday to Friday, 8am to 8pm Saturday and Sunday)

Concessionary travel – is offered to disabled people, whatever their age. Depending on individual circumstances this can be free or reduced cost travel on buses, trains and the Metro link. More information is available from

[TfGM website](#) or 0161 244 1050.

Ring and Ride service provides door to door transport for people who find it very difficult or impossible to reach a bus stop or access general buses. The service is not intended for daily travel to or from college, but could help a young person with other journeys. The ring and ride service can be accessed through,

**TfGM Ring and Ride** or telephone enquiries 0845 688 4933 or 0161 200 6011, telephone bookings 0845 688 3989.

Travel voucher scheme – this is available for people who are unable to use general buses and who have serious walking difficulties or are registered blind. Vouchers are not free but are substantially discounted. If young people have any queries about the scheme they should contact TfGM details above.

## 4 **Additional Journeys**

4.1 **Introduction.** This section explains the Council's policy for the provision of Travel arrangements for journeys additional to the normal provision at the beginning and end of the normal school working day.

4.2 **School Trips.** Home to school transport timings may be adjusted by the Council on request from schools to take account of connections with the departure/ arrival of educational or recreational school trips. Schools must notify such requests to the Council as early as possible to enable an assessment of any additional costs to be made. Where adjustments in timings would result in additional transport costs to the Council, schools will need to take this into account in the planning of school trips, and such costs must be reimbursed to the Council as part of the school's costing arrangements for the whole trip.

- 4.3 **Work Experience.** Transport will not be provided to enable students to undertake work experience.
- 4.4 **Induction Days/ 'Taster Days'.** Transport will be made available for entitled children attending Induction Days or 'Taster Days' at the Council's Special Schools and resourced provisions. Transport may also be provided for entitled children attending Induction/'Taster Days' at Independent Schools where such a school has been named by the Council in the child's Statement or Education and Health Care Plan and there is no other school closer to the child's home that can meet the child's needs.
- 4.5 **Breakfast Clubs/After School Clubs.** Transport will not be provided or adjusted to enable students to attend breakfast clubs/ after school clubs that do not fulfil part of the school curriculum, except where transport to/from such clubs can be provided without additional cost to the Council.
- 4.6 **Illness at School.** Transport will not normally be provided for students who are taken ill at school to enable them to return home. This is a parental or school responsibility.
- 4.7 **Medical/Dental Appointments.** Transport will not be provided or adjusted to enable students to attend medical or dental appointments. This is a parental responsibility.
- 4.8 **Detentions.** Transport will not be provided to take children home after detentions. This is a parental responsibility.
- 4.9 **Short Breaks / Respite.** Transport will not be provided to and from Short Breaks or respite appointments.
- 4.10 **College Attendance Whilst Registered at School.** For older children who spend a whole day at college or become dual-registered at the college whilst still being a registered pupil at a school, travel arrangements on those days may be adjusted to set down and pick up at the college, if this is possible within existing arrangements at no additional cost. If not, travel arrangements are the responsibility of the school or parent/carer. Transport arrangements for journeys during the school day to attend college placements are the responsibility of the school at which pupils are registered (for pupils with statements of SEN or EHC Plans this will be the school named on the statement or plan).

## **5 Vehicle Transport Service Standards**

- 5.1 The School and College Transport team is responsible for arranging and overseeing all agreed methods of travel arrangements provided to pupils with or without a EHC Plan/Statement of SEN. Travel arrangements will be provided according to the agreed school placement arrangements (e.g. daily, fortnightly, or in the case of 52 week provision at the start and end of the placement only). The responsibilities of the School and College Transport team include, but are not limited to;
  - 5.11 Implementing agreed travel arrangements, e.g. allocating suitable routes and pick-up and drop-off points
  - 5.12 Day to day amendments/queries relating to travel arrangements
  - 5.13 Managing provider contracts
  - 5.14 Managing contracts with licensed transport providers
  - 5.15 Managing in-house transport services provided by Bury Council Transport

5.16 Monitoring of transport providers

5.17 Investigating and responding to complaints about transport services

- 5.2 The service standards described below act as guidance and clarity for the service users for who travel arrangements are provided. Underlying these standards is the principle that, if the council agrees to provide travel arrangements, it will be provided in a safe, suitable and cost effective manner, taking account of the child's specific needs and with regard to the best use of the Council's resources.

## **6. Vehicles**

- 6.1 All transport will be provided in accordance with contractual standards and legislation.
- 6.2 All vehicles will be properly licensed in accordance with local regulation and national legislation
- 6.3 The Council will conduct regular monitoring of quality and service standards on all vehicles operated by the Council or its contractors.
- 6.4 Vehicles will have specialist wheelchair access and wheelchair restraint systems where necessary.
- 6.5 All vehicles will be road worthy, clean inside and out, fitted with seat belts and carry emergency equipment i.e. fire extinguisher and first aid kit and any other equipment/notices required by law, e.g. children sign on front and back of vehicle.

## **7 Transport Service Personnel**

### **7.1 Passenger Assistants**

- 7.11 The Council may provide a Passenger Assistant for children and young people who have severe physical or learning disabilities and/or challenging behaviours and where the child's safety requires it, and as determined during the assessment phase.
- 7.12 The need for a Passenger Assistant will be reviewed annually as part of the child's annual review.
- 7.13 Passenger Assistants will not be provided where parents/carers make their own travel arrangements.
- 7.14 Where provided, the Council will make every effort to ensure the same Passenger Assistant is used on a regular basis. This may not always be possible due to staff shortages, illness, holidays, retirement and staff resignations. Changes may also be necessary from time to time to ensure the efficient use of resources.
- 7.15 The Passenger Assistant should assist children on and off the vehicle and ensure they are seated safely while the vehicle is moving.
- 7.16 Passenger Assistants must treat parents/carers and children with respect and avoid confrontations. It is also expected that parents/carers will treat the passenger assistants with respect and consideration.
- 7.17 Passenger Assistants should deliver children to a member of school staff on arrival at the school so that at no time are children left unattended on the vehicle.

- 7.18 If the Passenger Assistant has a concern for any child in their care, the Head Teacher and the School and College Transport Team will be informed.
- 7.19 Passenger Assistants are not authorised to leave a child with anyone other than their parent/carer or named responsible adult (16+) identified in advance to the School and College Transport team in writing by the parent/carer.
- 7.110 All Passenger Assistants will have enhanced Disclosure and Barring Service (DBS) clearance.
- 7.111 Passenger Assistants must carry and display suitable identification at all times.
- 7.112 Passenger Assistants must adhere to the Council's no smoking policy.
- 7.113 Passenger Assistants have strict instructions not to enter into any personal arrangements with parents/carers, including changing pick up or drop off points without consulting the Council.

## **7.2 Drivers**

- 7.21 Drivers must carry and display suitable identification at all times.
- 7.22 Drivers must have enhanced DBS clearance.
- 7.23 Drivers must, as far as possible, be punctual.
- 7.24 Drivers must ensure that all wheelchairs are securely restrained.
- 7.25 Drivers must treat parents and children with respect and avoid confrontations. It is also expected that parents/carers will treat the drivers with respect and consideration.
- 7.26 Drivers must report any poor behaviour of passengers to their supervisor to relay onto the School and College Transport Team. Also to the school and parent as necessary.
- 7.27 Drivers must ensure that all passenger harness and safety straps are properly adjusted and fitted securely before the journey commences.
- 7.28 Drivers must adhere to the Council's no smoking policy.
- 7.29 The driver is to stop, as close to the home address or collection point as traffic conditions will safely permit.
- 7.210 The driver is not allowed to sound his horn to alert parents that they are there.
- 7.211 Neither drivers nor Passenger Assistants are responsible for taking a child across the road if a parent/carer is waiting on the other side.

## **8 Health and Safety**

- 8.1 All wheelchairs and buggies used for passenger seating in the vehicles (ie not folded and stowed) must be crash tested and certified suitable for transport.
- 8.2 The School and College Transport team will use the Transport Information Forms completed by parents/carers each year, together with information provided by the SEN team, to inform Risk Assessments for travel arrangements for each child. The majority of children/young people will be covered by a generic Risk Assessment for transport. However, in more complex cases, a specific Risk Assessment will be undertaken. Relevant information from these Risk Assessments will be shared with transport

providers to enable them to exercise their duty of care to passengers that they are transporting. Such information will be protected by BITU and the Council's contractors in accordance with agreed data protection arrangements.

- 8.3 Passenger Assistants are trained in disability awareness, safeguarding, basic first aid and receive additional training specific to the child's needs where necessary. However, in the event of an emergency, Passenger Assistants and drivers will contact 999 emergency services in the first instance.
- 8.4 Transport staff are not permitted to administer recovery medication to any passenger
- 8.5 It is vital that parents/carers advise the School and College Transport team of any health concerns that may affect their child whilst on transport. Such information may include details of things such as allergies, for example, even if not thought to be directly relevant to transport. This information must be included in the Transport Information Form when vehicle transport is agreed and reviewed annually, and whenever the child's needs change.
- 8.6 Children and young people are not permitted to consume food or drinks whilst on board a vehicle unless this has been agreed in exceptional circumstances by the School and College Transport team. This standard will be strictly enforced to ensure the continuing safety of all passengers whilst travelling.
- 8.7 It is the responsibility of parents/carers to ensure that arrangements are in place AM and PM to ensure the safe handover of their child to and from the care of the transport provider. The handover of children must happen at the vehicle, apart from in exceptional circumstances agreed by the School and College Transport team in advance, to ensure that the Passenger Assistant and driver can maintain the supervision and safety of other passengers.
- 8.8 In the case of extreme weather conditions, transport services will not operate. Decisions to cancel transport will be taken by the council and/or transport providers according to information provided by schools and on the basis of their own risk assessments.
- 8.9 In the case of extreme weather conditions, should a parent or carer choose to transport their child to school themselves, then it is their responsibility to undertake the return journey as well.

## **9 Journey times**

- 9.1 The Council will endeavour to ensure that pupils arrive at school fit to learn, and recognise that the length of the journey to school can affect this aim.
- 9.2 Journey times may be longer where pupils are travelling to schools and colleges outside of the Borough of Bury.
- 9.3 On occasions there may be factors outside the Council's control e.g. unforeseen traffic congestion or bad weather that may affect journey times.
- 9.4 In certain circumstances it may be necessary for the Council to vary planned routes and this may affect pick up and drop off times. Where this is the case the Council or provider will endeavour to contact parents/carers in advance to advise them.
- 9.5 Pick up and drop off times affect journey times and will therefore not be altered to fit parental circumstances (for example, a parent's work schedule)

## **10 Vehicle Waiting Times (Mornings)**

- 10.1 Parents/carers are expected to be available at home or at an agreed collection point, at an agreed time to meet transport in the morning.
- 10.2 To keep journey times down to an absolute minimum and ensure that all pupils arrive at school on time, all vehicles will adhere to strict waiting time limits as follows:
- 10.3 If a child is not ready, or not at the agreed collection point, the vehicle will wait for a maximum of 3 minutes after the agreed pick up time and then move off. If this means the child is unable to travel on the organised vehicle, the parent/carer is then responsible for ensuring that the child gets to school on time.
- 10.4 If the vehicle arrives early for a pick-up it will wait until the official set time and then a maximum of 3 minutes before moving off. If this means the child is unable to travel on the organised vehicle, the parent/carer is then responsible for ensuring that the child gets to school on time.
- 10.5 If the vehicle is running late for a pick up, the crew are expected to advise parents/carers of the delay as soon as possible. When a vehicle arrives at a family home or collection point, the horn will **not** be sounded. Parents/carers are expected to have their child ready and waiting to board the vehicle.
- 10.6 If a child/young person is not available for pick up within the time limits given above, for any reason, and no prior cancellation of the transport requirement has been received by the Council, this will be considered as a 'no show' and parents/carers will be advised accordingly. If 3 'no shows' are recorded during the Academic Year transport will be withdrawn and parents/carers will be responsible for the child/young person's attendance at school and any transport required.

## **11 Vehicle Waiting Times (Afternoons)**

- 11.1 Parents/carers must be available at home or the nominated delivery point, at the regular drop off time, every afternoon to meet their child.
- 11.2 Parents/carers must provide emergency contact details.
- 11.3 In the event that a parent/carer is unable to meet their child at the specified time and location, the emergency contact details will be used. If unsuccessful and as a final resort, the child will be taken to a place of safety and the parent/carer will be notified. It will then be the parents/carers responsibility to collect from that place.
- 11.4 At times, parents/carers may need to make emergency alternative arrangements for the handover of their child to a nominated responsible adult, either at the home address or at an alternative address within the Borough of Bury. In these cases it is the parent/carer's responsibility to notify the School and College Transport team and make suitable arrangements to ensure their child's safety.
- 11.5 In circumstances where vehicles are delayed or late arriving the parent/carer should contact the School and College Transport team. The team will take steps to directly address the situation with the provider.
- 11.6 Where no responsible adult is available to meet a child from transport on more than two occurrences, travel arrangements will be reviewed and may be



suspended or permanently withdrawn. In these cases, the parents/carers will receive no more than four letters

- (i) initially raising the concerns
- (ii) informal warning indicating the remedial steps taken and the potential of transport removal
- (iii) final warning indicating that transport will be removed.

The School and College Transport team jointly with the Special Educational Needs team will issue the fourth and final letter confirming the removal of transport, citing the reasons for the removal, the date of the proposed removal and the parental route of appeal. In these cases, parents/carers become responsible for their child's attendance at school and any transport required.

## **12 Absences**

12.1 Where a child cannot attend school on any particular day due to illness it is the parents/carers responsibility to:

- (i) Contact the passenger assistant and contractor the day before travel is required, if it is known that the child will be off school the next day or;
- (ii) Contact the passenger assistant or contractor as early as possible in the morning of the day their child is due to travel, if the child has only just begun to show signs of illness.

12.2 When travel arrangements are cancelled due to illness, with no specified timeframe, **it will only be reinstated** when the parent/carer notifies the School and College Transport Team.

12.3 This advice should be given on **the day before** the child is due to return to school.

12.4 Travel arrangements will be reviewed, and may be suspended for a period of time or permanently withdrawn, if it becomes apparent that transport is not being cancelled with reasonable advance warning. Parents/carers will be responsible for ensuring their child's regular attendance at school in such circumstances.

## **13 Behaviour**

13.1 The School and College Transport Team reserves the right to refuse to provide travel arrangements where a child's/young person's behaviour is such that it is unacceptable (the child's / young person's additional needs will be taken into account). In these cases, the parents will receive no more than four letters

- (i) initially raising the concerns
- (ii) informal warning indicating the remedial steps taken and the potential of transport removal
- (iii) final warning indicating that transport will be removed.

The School and College Transport team jointly with the Special Educational Needs team will issue the fourth and final letter confirming the removal of transport, citing the reasons for the removal, the date of the proposed

removal and the appeal process. In these cases, parents become responsible for their child's attendance at school and any transport required.

- 13.2 Where the Council or its contractors consider that a child's / young person's behaviour is so extreme as to constitute an immediate or ongoing risk to the Health and Safety of her/himself, other service users, the vehicle crew, or members of the public, the Council reserves the right to suspend the provision of travel arrangements immediately until or unless the issue can be resolved by parents/ carers, the child's/young person's school/college, or other appropriate professionals, to the Council's satisfaction that all reasonable adjustments have been made. If a child or young person is suspended from the provision of travel arrangements in these circumstances, her/his parents will become responsible for their child's attendance at school and the provision of any travel support required.
- 13.3 Any wilful damage that incurs cost to the transport provider for either repair or cleaning remains the responsibility of the parent/carer of the child concerned. Continued or repeat behaviour that results in wilful damage can result in withdrawal of travel arrangements.

#### **14 Safeguarding Children and Young People**

- 14.1 All children and young people will be handed over to a responsible adult at the drop off address within the Borough of Bury, provided by parent/carer. Drivers and Passenger Assistants are not permitted to leave children and young people with any person under the age of 16 or who is not an 'authorised' adult.
- 14.2 Prior to starting transport, the School and College Transport Team will request details of any authorised adult and/or emergency contact details for any person who a child or young person can be handed over to in the event of an emergency.
- 14.3 A child or young person must never be removed from a vehicle anywhere on a route other than at the normal setting down point for that journey. The only exceptions to this would be long distance journeys, when it is necessary to make pre-agreed rest stops, or in emergencies.

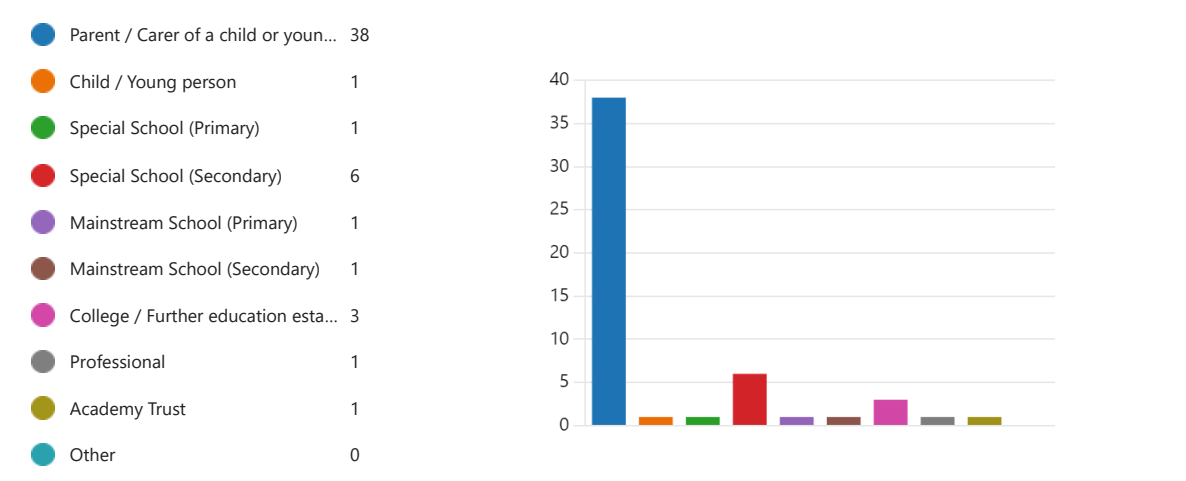
# Home to School Travel Policy

45 Responses

12:15 Average time to complete

Active Status

1. 1. Are you a:

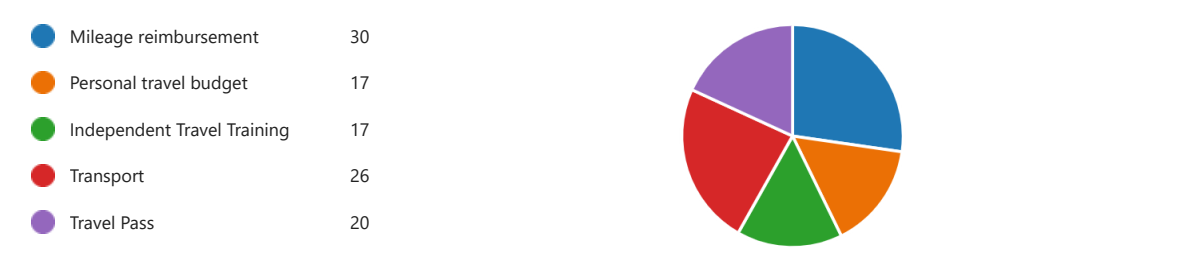


2. 2. How easy is the proposed Home to School Travel Policy to understand?



3. 3. Travel Assistance Offer

Are you aware of any of the below travel assistance options available through the current policy?



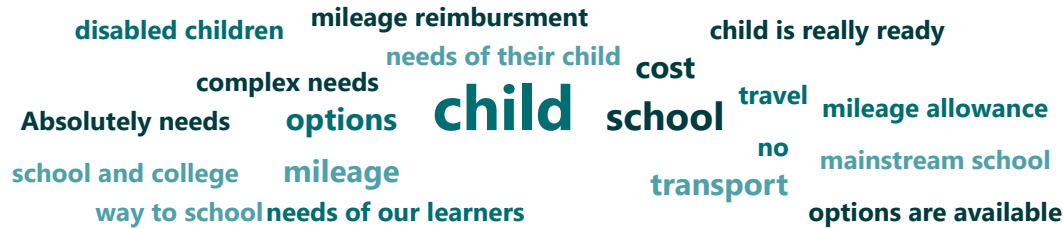
4. 4. The above travel assistance will continue to be available in the new policy? Do you have any thoughts on this?

24  
Responses

Latest Responses  
"As it should "

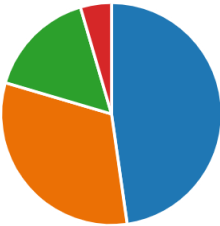
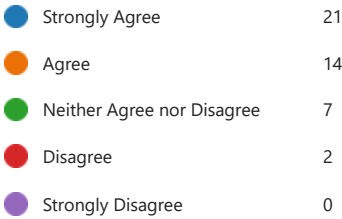
"That's good, so long as the complex needs of our learners with SEMH and SE..."  
"The personal travel budget states that it can be used to pay for a PA or taxi f...

8 respondents (33%) answered **child** for this question.



5. 5. Process Changes

In the policy, eligibility for travel assistance will automatically be considered as part of any new Education, Health and Care Plan (EHCP) assessment to streamline processes. Do you think this will have a positive impact on families?



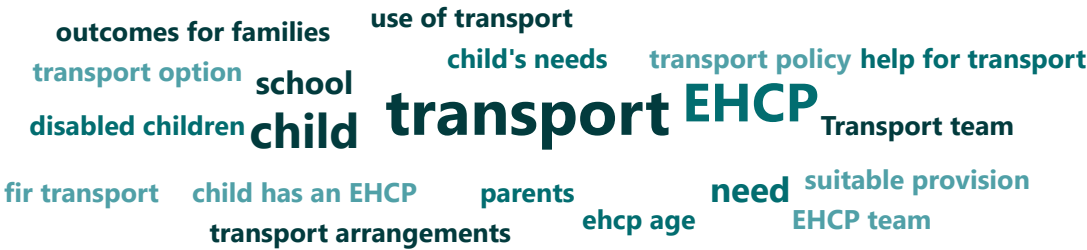
6. 6. Please add any further comments on question 5:

21  
Responses

Latest Responses

"Suitable transport needs careful consideration with regards to catering for le..."  
"Who will consider the eligibility? Will this be school staff or members of the ..."

12 respondents (57%) answered **transport** for this question.



7. 7. Change of Circumstance

For occasions where a change of circumstance (eg change of address, change of school or change in the child or young person's needs) is required for a child or young person's travel the policy suggests a simpler one-page form rather than restarting a whole assessment. Do you think this will have a positive impact on families?

Strongly Agree	32
Agree	10
Neither Agree or Disagree	2
Disagree	0
Strongly Disagree	1



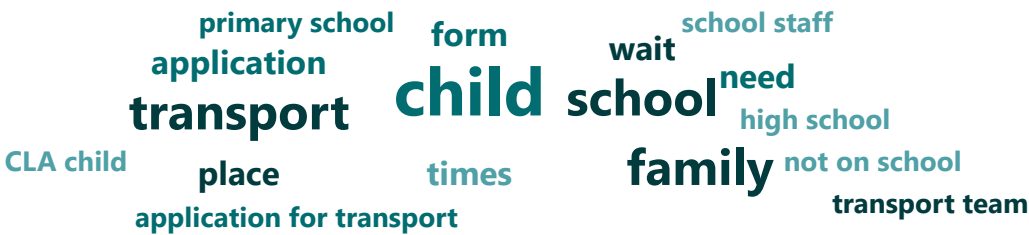
8. 8. Please add any further comments on question 7:

8  
Responses

Latest Responses

"When a child moves to high school, the application for transport must be se...  
"This will be easier for families to complete. Will this also mean that the proc...

4 respondents (50%) answered **child** for this question.



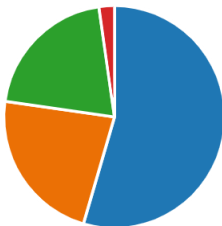
9. 9. Proposal for Pre School Age Children

The current policy refers to eligibility linked to statutory school age (5-16) based on the Council's statutory duty to provide travel assistance (as per DFE Home to School Travel and Transport Guidance 2024) however with the Council having discretion to provide travel assistance in other circumstances. This includes currently providing transport for pre-school and post 16 age groups.

The emerging principles from the engagement sessions considered whether travel assistance should only apply to statutory school age (5-16), or whether through aligning travel assistance assessment to the EHC Plan process, eligibility should be based on need and age linked to the delivery of the EHC Plan.

Therefore the new policy eligibility criteria proposes that Travel Assistance may be provided for Pre-School children who are attending Hoyle Nursery or a mainstream or special school with an EHCP. Do you agree or disagree with this criteria?

Strongly Agree	24
Agree	10
Neither Agree or Disagree	9
Disagree	1
Strongly Disagree	0

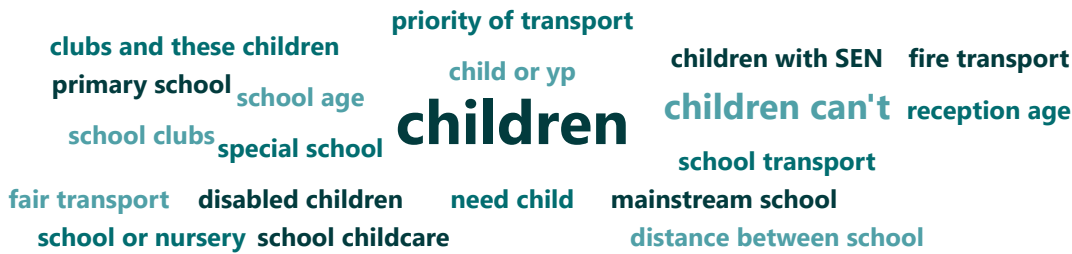


10. 10. Please add any further comments on question 9:

7  
Responses

Latest Responses  
"Travel must align with a student's EHCP including continuation for those wh...

5 respondents (71%) answered **children** for this question.



11. 11. Proposal for Post-16 Children and Young People

The current policy refers to eligibility linked to statutory school age (5-16) based on the Council’s statutory duty to provide travel assistance (as per DFE Home to School Travel and Transport Guidance 2024) however with the Council having discretion to provide travel assistance in other circumstances. This includes currently providing transport for pre-school and post 16 age groups.

The emerging principles from the engagement sessions considered whether travel assistance should only apply to statutory school age (5-16), or whether through aligning travel assistance assessment to the EHC Plan process, eligibility should be based on need and age linked to the delivery of the EHC Plan.

Therefore the new policy now proposes that for post 16 aged children and young people travel assistance may be offered to those attending a full time course at a minimum of 20 hours per week and the nearest provision to their home. If assessed as being eligible the assistance that may be offered could include the following: personal travel budget, mileage or independent travel training. Do you agree or disagree with this proposal?

Strongly Agree	15
Agree	11
Neither Agree or Disagree	9
Disagree	4
Strongly Disagree	5

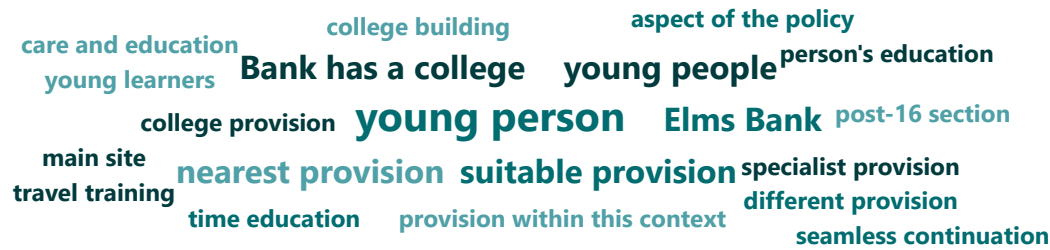


12. 12. Please add any further comments on question 11:

11  
Responses

Latest Responses  
"Why is this proposed to be offered to the nearest provision to home? This m...

5 respondents (45%) answered **young person** for this question.



13. 13. Proposal for Adult Learners

The current policy refers to eligibility linked to statutory school age (5-16) based on the Council’s statutory duty to provide travel assistance (as per DFE Home to School Travel and Transport Guidance 2024) however with the Council having discretion to provide travel assistance in other circumstances. The proposed policy now clarifies the offer for adult learners (aged19-25) differentiating from the post 16 offer.

Local authorities have a duty with regard to transport or travel for adult learners. The overall intention of the adult transport duty is to ensure that those with the most severe disabilities with no other means of transportation are able to undertake further education and training after their 19th birthday to help them move towards more independent living.

The options that will be considered when assessing the travel assistance that may be provided may include, but are not limited to: mileage rates, personal travel budget, transport and independent travel.

Do you agree or disagree with this proposal?

Strongly Agree	15
Agree	13
Neither Agree or Disagree	12
Disagree	2
Strongly Disagree	2



14. 14. Please add any further comments on question 13:

8

Responses

Latest Responses

4 respondents (50%) answered **need** for this question.

learners might be able

direct correlation

colleges and provisions

Health and Care

helped

need

transport

adult learners

EHCP planning

Elms Bank

complex learners

ehcp covers

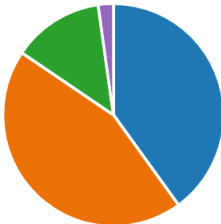
requirements of the learner

planning and transportation

15. 15. Flexibility

Feedback from our co-production sessions showed that flexibility would be helpful for families in situations where for example schools finish early at the end of term or to support attendance at school wraparound care provision. The policy states that the "Council may work with parents / carers to accommodate changes where possible while having regard to the constraints of operational delivery and efficient use of its resources to allow for this". Do you agree or disagree with this proposal?

Strongly Agree	18
Agree	20
Neither Agree or Disagree	6
Disagree	0
Strongly Disagree	1



16. 16. Please add any further comments on question 15:

7

Responses

Latest Responses

" '27. Where ...the parent's circumstances subsequently change and they are ...

5 respondents (71%) answered **school** for this question.

able

school

children



17. 17. Alternative Travel Options

If you do not currently access alternative travel options such as mileage reimbursement, personal travel budget or independent travel training what do you feel are the barriers that prevent this as being a suitable travel option for your child/young person?

24  
Responses

Latest Responses  
"Tash hugely benefits from being with different children and adults. "

5 respondents (21%) answered **child** for this question.



18. Have you any other comments on the proposed Home to School Travel policy?

17  
Responses

Latest Responses  
"What if a swift change of setting is required to meet more a complex need? ..."  
"It would be helpful for the department to produce a leaflet outlining the hel..."

6 respondents (35%) answered **transport** for this question.



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## Equality Impact Analysis

This equality impact analysis establishes the likely effects both positive and negative and potential unintended consequences that decisions, policies, projects, and practices can have on people at risk of discrimination, harassment, and victimisation. The analysis considers documentary evidence, data, and information from stakeholder engagement/consultation to manage risk and to understand the actual or potential effect of activity, including both positive and adverse impacts, on those affected by the activity being considered.

To support completion of this analysis tool, please refer to the equality impact analysis guidance.

### Section 1 – Analysis Details (Page 5 of the guidance document)

<b>Name of Policy/Project/Decision</b>	Travel Assistance between home and school or college for pupils and young people with Special Educational Needs and Disability.
<b>Lead Officer (SRO or Assistant Director/Director)</b>	Jeanette Richards
<b>Department/Team</b>	Children & Young People
<b>Proposed Implementation Date</b>	1 June 2024
<b>Author of the EqlA</b>	Nicola Hudson
<b>Date of the EqlA</b>	21 March 2024

<b>1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?</b>
<p>It is proposed to review the policy for travel arrangements between home and school or college for pupils and young people with Special Educational Needs and Disability (SEND).</p> <p>The policy outlines the travel support available to children and young people with SEND living within the borough of Bury.</p> <p>The policy describes the eligibility criteria for travel assistance, the statutory provision and the kind of travel arrangements that may be provided.</p> <p>The Council's statutory duty is to make transport arrangements for all eligible children who cannot reasonably be expected to walk to school because of their mobility problems or because of associated health and safety issues relating to their special educational needs or disability.</p> <p>Section 35B of the Education Act defines eligible children as those of compulsory school age, 5 to 16 years.</p>

Section 509F and 508G of the Education Act places a statutory duty on the Council to consider Post 19 travel assistance. This applies to students aged 19 and over who commenced their programme of learning after their 19<sup>th</sup> birthday.

Non statutory provision includes travel assistance for children under the age of 5 and travel for young people aged 16 to 18, post 16. The Council has a duty to publish an annual transport policy statement specifying the arrangements for the provision of transport and travel that is considered necessary to facilitate the young person's attendance at college or sixth form. The flexibility of the post 16 element of the policy is determined by the Council.

The School & College Transport Team currently provide home to school & college travel assistance for approximately 658 children attending 70 schools and colleges both within and outside the borough of Bury.

Consideration to be given to the implementation of a co-produced policy providing greater flexibility for families while working alongside DfE statutory guidance:

- Realigning the assessment of travel assistance with the current Education, Health and Care Plan (EHCP) process.
- Simplifying the process for a change in circumstances (change of address, school, or the child/young person's individual needs).
- Removal of post 16 transport provision – removal of transport as an offer of travel assistance for young people attending college or further education aged 16 to 19 that commence their course of learning before the age of 18. Travel assistance to be provided in the form of mileage reimbursement, personal travel budget or independent travel training.
- Inclusion of travel assistance for children under the statutory school age (5 years of age) where specialist provision is named in the Education, Health and Care Plan.
- Removal of transport to short breaks / respite provision. Short breaks/respite is designed for children and young people to access an overnight or short stay with a carer or specialist provision to allow parents/carers and their families a break from full time care.
- Review of provision of transport for students on a reduced timetable – Pupil Referral Unit (Pru)/Alternative Provision with a view to shared transport only at the beginning and end of the school day. School and parents to be responsible for requirements that differ. PRU's and Alternative Provision are defined as education outside of a school setting where the child/young person is unable to attend a mainstream school.
- Review of the current personal travel budget allowance, introduction of a banding system based on the return mileage between home and the school.

In addition, the statutory post 19 provision, travel assistance for young people over the age of 19 to a place of learning has been included in the travel policy following the outcome of a Local Government Ombudsman investigation.

## Section 2 – Impact Assessment (Pages 6 to 10 of the guidance document)

### 2.1 Who could the proposed policy/project/decision likely have an impact on?

Employees: **Yes/No (state reasons for answering ‘no’)** – staff allocated to routes for post 16 students to be reallocated to alternative routes

Community/Residents: **Yes/No (state reasons for answering ‘no’)**

Third parties such as suppliers, providers, and voluntary organisations: **Yes/No (state reasons for answering ‘no’)** – Phased reduction in post 16 transport requirements will result in a reduction in the vehicles required for post 16 students. Vehicles will be reallocated to support statutory 5-16 demand.

If the answer to all three questions is ‘no’ there is no need to continue with this analysis.

### 2.2 Evidence to support the analysis. Include documentary evidence, data, and stakeholder information/consultation

Documentary Evidence:

Current policy

[Travel arrangements between home and school or college for pupils and young people with Special Educational Needs and Disability – current policy.](#)

**Home to School Travel** – Updated [Statutory guidance issued by Department for Education \(DfE\)](#), Local Authorities’ statutory duty in relation to eligible children – suitable/qualifying schools, statutory walking distances, special educational needs, disability or mobility problems,

children with EHC plans, walking routes, accompaniment, promoting independence for eligible children with SEND. Local Authorities' discretionary power, suitability of travel arrangements, policy changes.

[Post 16 transport & travel support to education and training – Statutory guidance issued by Department for Education \(DfE\)](#) Local Authority responsibility, assessment of arrangements, specific considerations of learners with special educational needs and disabilities

### Engagement sessions with Bury2gether

#### Data:

#### Service data – eligible children & young people, transport routes, mileage reimbursements & personal travel budgets.

The current profile of travel assistance and Transport is shown below:

	Transport		Mileage or Personal travel Budget		Out of Borough Transport		Total	
	Number of children & young people	Cost	Number of children & young people	Cost	Number of children & young people	Cost	Number of children & young people	Cost
Under 5	7	£83,951	0	£0	0	£0	7	£83,951
6-16 years	397	£2,563,905	97	£133,659	88	£498,065	582	£3,195,629
Post 16	44	£390,592	17	£213,53	0	£0	61	£411,945
Post 19	8	£19,760	0	£0	0	£0	8	£19,760
	458	£3,178,207	114	£155,012	88	£498,065	658	£3,831,284

If, for children of statutory school age currently being provided with home to school transport, the take up of mileage payments and personal budgets could be increased by 5% and, if 90% of post 16/19 students determined as eligible for travel assistance were to be provided with a personal budget or mileage payment, as the standard offer, this would result in the following profile:

	Transport		Mileage or Personal travel Budget		Out of Borough Transport		Total	
	Number of children & young people	Cost	Number of children & young people	Cost	Number of children & young people	Cost	Number of children & young people	Cost
Under 5	7	£83,951	0	£0	0	£0	7	£83,951
6-16 years	377	£2,434,666	117	£161,109	88	£498,065	582	£3,093,840
Post 16	6	£53,262	55	£69,080	0	£0	61	£122,342
Post 19	1	£17,470	7	£8,792	0	£0	8	£26,262
	391	£2,589,349	179	£238,981	88	£498,065	658	£3,326,395

Based on the current number of children and young people in receipt of travel assistance, the proposed policy can be delivered within the available resources, as determined by the Council's approved budget for 2024/25, subject to the impact of any tapering arrangements whereby existing eligibility is protected until a change in an individual's circumstances, and with the caveat that eligibility can only be determined based on an individual's assessment of need.

### Budget report

The approved budgets for 2024/25 are as follows:

Personal Travel assistants/bus escorts	£633,000
Home to School SEN General	£199,200
SEN Transport - Outborough	£529,000
Independant school travel	£81,100
Home to school – individual schedules	£2,448,450
Home to school – general	£163,560
Home to school – non SEN general	£138,300
Home to college transport	£422,100
<b>Total budget provisions</b>	<b>£ 4,614,710</b>

### Workforce data

Passenger Assistants - 55 permanent pupil escorts, 8 relief pupil escorts  
Contractors – 24 contractors are approved on the Home to School & College Transport contract  
Number of routes/drivers - 110 transport routes/schedules as of 3 April 2024.

Passenger Assistants are not provided for post 16 transport except for Elms Bank College Hub where a number of students attend and travel on shared transport. Passengers Assistants are allocated to 3 out of the 7 routes/schedules serving Elms Bank College Hub. Following the implementation of the revised policy demand on post 16 transport will reduce however, the young people allocated to transport will not be affected until there is a change in their individual circumstances resulting in a gradual phased reduction in transport requirements. Staff employed on routes to Elms Bank College Hub will remain in place unless the number of young people travelling on their allocated route

reduce and it is no longer viable to keep that vehicle in place. Any passenger assistants affected will be reallocated to an alternative vacant route/schedule.

Due to the continual changes in transport requirements the service regularly operate routes without a permanent member of staff allocated, these routes are temporarily covered by relief pupil escorts while recruitment processes are undertaken.

### **Stakeholder information/consultation:**

#### **Engagement sessions with Bury2gether**

Throughout January 2024 a series of engagement workshops were held to inform the drafting of a new policy. Parents/carers of children and young people currently accessing the service were invited alongside schools and Bury2gether (parent/carer forum).

Key emerging themes:

#### **Service Redesign**

- Realigning the assessment for travel assistance with the current Education Health and Care Plan (EHCP) process where appropriate.
- Simplifying the process for a change in circumstances (change of address, school, or the child/young person's individual needs).

#### **Eligibility**

- Clarifying the Council's statutory duty in relation to pre-school age children, 5-16 year olds, post 16 provision and adult learners (post 19).

#### **Travel Assistance Offers**

- Clearly explaining the forms of travel assistance that may be offered to eligible children and young people. These include mileage reimbursement, personal travel budgets, transport, travel passes and independent travel training.

#### **Mileage Rates & Personal Budgets**

- Streamlined processes for reimbursement
- Review of rates paid

#### **Flexibility**

- Providing additional flexibility for transport wherever possible to accommodate timetable changes or changes to the school day.

#### **Workforce Development**

- Improve recruitment & retention of staff
- Training & development programme

#### **Communication**

- Improved timely communications



- Performance standards

**Co-production of proposed policy with Bury2gether, taking account of the above key emerging themes.**

In February 2024 further meetings were held to co-produce a draft proposed policy taking into consideration the key themes from the engagement workshops.

**Consultation on proposed policy with all stakeholders:**

The formal consultation commenced on 26 February and closed on 5 April 2024. The following cohorts were directly informed of the consultation via email and invited to submit their views:

- Parents/Carers of service users
- Parents/Carers of children & young people in receipt of an EHC (Education, Health and Care) plan (not in receipt of travel assistance)
- Workplace teams/colleagues
- Schools
- Colleges
- School governors
- Councillors & MP's
- Bury2gether (Parent/Carer forum)
- Contractors
- Pupil Escorts

In addition the consultation has been advertised on Bury Council's website, the local offer, social media and in the SEND newsletter. Bury2gether (parent/carers forum) also posted a link on their facebook page and have encouraged participation amongst the parents/carers they support and represent.

The consultation asked a number of questions linked to the emerging themes from the stakeholder engagement workshops, and also sought views on the new policy. The outcome from that consultation can be summarised as:

- A total of 45 responses were received, 38 of which were submitted by parents or carers, with one from a child, and the balance from schools, colleges, professionals and an academy trust.
- Whilst the majority of respondents found the new policy easy to understand or expressed a neutral view, almost a 1/3<sup>rd</sup> of respondents indicated it was somewhat not easy to understand. It is proposed that alongside the launch of the new policy, a summarised guide be produced.

- In terms of the travel assistance offer, respondents were asked to confirm their awareness of the options available (multiple selections could be made). Only 15% of responses confirmed awareness of personal budgets and independent travel training which indicates that further promotion of the options available within the travel assistance offer is required, which can also be incorporated into the summarised guide.
- All travel assistance options available within the current policy will remain in the new policy. The majority of respondents who expressed a view agreed with this, with the caveats that current personal budgets and mileage reimbursement rates do not cover the actual costs incurred, and that the complex needs of the children and young people concerned must be considered.
- In line with the emerging principles from the initial engagement workshops, the majority (78%) agreed with alignment of assessment for transport with the Education, Health and Care assessment process, believing that it would have a positive impact for the families involved.
- Similarly there was strong support for streamlining processes for occasions when there is a change in circumstance, such as change of address, change of school, or a change in needs.
- There was significant support for the intention to assess pre-school children for eligibility for transport alongside the EHCP assessment process, based on the needs of the child, rather than the current policy that excludes children under statutory school age.
- In respect of post 16 students, the consultation sought views on the intention to offer students deemed eligible for travel assistance a personal budget, mileage payment or independent travel training. 26 of 44 respondents agreed, with 9 disagreeing and the remaining being neutral. Within the new policy existing eligibility is protected until a change in an individual's circumstances
- For post 19 students, the consultation sought views on the intention of the Council to assess for eligibility based on need and to then provide travel assistance primarily through the use of personal travel budgets or mileage payments, but which could include transport in certain circumstances. The majority of respondents agreed with this approach, with only 4 of the 42 responses disagreeing.
- Feedback from the co-production sessions indicated that flexibility would be helpful for families in situations where for example schools finish early at the end of term or to support attendance at school wraparound care provision. The new policy states that the "Council may work with parents/carers to accommodate changes where possible while having regard to the constraints of operational delivery and efficient use of its resources to allow for this". The majority of respondents supported this.

- The consultation sought views on the barriers to families in taking up alternative travel options, such as mileage reimbursement, personal travel budget or independent travel training. Again some respondents cited rates of personal budgets and mileage reimbursements being insufficient to cover costs incurred, other reasons given were in relation to family circumstances and/or the needs of the child or young person concerned.

**2.3 Consider the following questions in terms of who the policy/project/decision could potentially have an impact on. Detail these in the impact assessment table (2.4) and the potential impact this could have.**

- Could the proposal prevent the promotion of equality of opportunity or good relations between different equality groups? No
- Could the proposal create barriers to accessing a service or obtaining employment because of a protected characteristic? Yes
- Could the proposal affect the usage or experience of a service because of a protected characteristic? Yes
- Could a protected characteristic be disproportionately advantaged or disadvantaged by the proposal? Yes
- Could the proposal make it more or less likely that a protected characteristic will be at risk of harassment or victimisation?
- Could the proposal affect public attitudes towards a protected characteristic (e.g. by increasing or reducing their presence in the community)? Yes
- Could the proposal prevent or limit a protected characteristic contributing to the democratic running of the council? No

2.4 Characteristic	Potential Impacts	Evidence (from 2.2) to demonstrate this impact	Mitigations to reduce negative impact	Impact level with mitigations Positive, Neutral, Negative
Age	Inclusion of travel assistance to under 5's with specialist provision named in EHCP	Non statutory element of policy		Positive
	Removal of dedicated transport offer for post 16 students	Non statutory element of policy	Existing eligibility will be protected until a change in an individual's circumstances Offer of mileage reimbursement, personal travel budget or	Neutral

	Inclusion of statutory post 19 provision for students aged over the age of 19 that commenced their programme of learning after the age of 19.	Statutory element of policy	independent travel training. Publication of annual policy statement detailing alternative offers of support available.	Positive
<b>Disability</b>	Eligibility for travel assistance assessed on individual's needs	Statutory element of policy	Launch of new policy communicated to all service users together with a summarised guide Promotion through parent/carer forum Drop in sessions to be offered in special schools Statutory duty to make reasonable adjustments.  Councils are advised that when making travel arrangements for	Neutral

			children with special educational needs and disability they will need to identify and consider their individual needs and ensure the provision provided meets their needs. For example, children with a high level of need may need the support of a passenger assistant on their journey, or a child/young person using a wheelchair or walking frame that may need to be transported with them. The revised policy takes this into consideration.	
<b>Gender Reassignment</b>				
<b>Marriage and Civil Partnership</b>				
<b>Pregnancy and Maternity</b>				
<b>Race</b>			Launch of new policy communicated to all service users together with a summarised guide Promotion through parent/carer forum Drop in sessions to be offered in special schools	Neutral

<b>Religion and Belief</b>				
<b>Sex</b>				
<b>Sexual Orientation</b>				
<b>Carers</b>	Removal of non-statutory transport provision for respite care	4 children/young people eligible for respite provision.  Cambeck Close is an NHS service providing overnight short breaks and support to children and young people that have a learning disability and additional healthcare needs.	Non statutory element  Families affected will be signposted to alternative travel options.	Negative
<b>Looked After Children and Care Leavers</b>	Removal of dedicated transport offer for post 16 students	Non statutory element of policy	Liaison with Virtual School/Social Care colleagues to identify care leavers Existing eligibility will be protected until a change in an individual's circumstances Offer of mileage reimbursement, personal travel budget or independent travel training. Publication of annual policy statement detailing alternative offers of support available.	Neutral
<b>Socio-economically vulnerable</b>	Removal of dedicated transport	Non statutory element of policy	Contribution towards the cost of travel to be made to eligible young people	Neutral

	offer for post 16 students		in the form of mileage reimbursement, personal travel budget or independent travel training.  Further review of mileage and personal travel budget rates to be undertaken.	
Veterans				

**Actions required to mitigate/reduce/eliminate negative impacts or to complete the analysis**

2.5 Characteristics	Action	Action Owner	Completion Date
Age 16-18	<p>Offer of mileage reimbursement, personal travel budget and independent travel training to remain an offer of travel assistance within the revised policy. Post 16 travel assistance is non statutory.</p> <p>It is proposed to review mileage rates and the potential introduction of banding arrangements for personal travel budgets to ensure that they are an attractive option to parents, and to encourage take up of these forms of travel assistance as opposed to home to school transport.</p> <p>This review will be undertaken separately and be subject to a further report to Cabinet. Until that time, existing funding rates will be used.</p> <p>The Council has a duty to publish an annual transport policy statement specifying the arrangements for the provision of travel assistance that is considered necessary to facilitate attendance at college or sixth form. The flexibility of the post 16 element of the policy is determined by the Council.</p>	Nicola Hudson	By 31 May (annual basis)

### Section 3 - Impact Risk

Establish the level of risk to people and organisations arising from identified impacts, with additional actions completed to mitigate/reduce/eliminate negative impacts.

#### 3.1 Identifying risk level (Pages 10 - 12 of the guidance document)

Impact x Likelihood = Score			Likelihood			
			1	2	3	4
			Unlikely	Possible	Likely	Very likely
Impact	4	Very High	4	8	12	16
	3	High	3	6	9	12
	2	Medium	2	4	6	8
	1	Low	1	2	3	4
	0	Positive / No impact	0	0	0	0

Risk Level	No Risk = 0	Low Risk = 1 - 4	Medium Risk = 5 – 7	High Risk = 8 - 16
------------	-------------	------------------	---------------------	--------------------



<b>3.2 Level of risk identified</b>	<p>Low – 2</p> <p>Due to the removal of transport for post 16 students there is a risk of negative media coverage and a challenge by parents/carers of the young people affected.</p>
<b>3.3 Reasons for risk level calculation</b>	<p>Positive amendments have been made to the policy to include travel assistance to children under the age of 5 where it is specified within their Education, Health &amp; Care Plan that they will attend a specialist provision. The provision of travel assistance to under 5's is not a statutory requirement and inclusion within the policy will enhance and support the transition of children into their education.</p> <p>The inclusion of post 19 travel assistance is also a positive inclusion in the policy and will provide the most vulnerable young people with special educational needs access to continued education. Travel assistance will be considered for those students with no means of accessing their college course unless they receive support from the local authority.</p> <p>A cohort of students aged 16 to 18 accessing post 16 education will be negatively impacted by the change in policy. The provision of travel assistance for students commencing a course before their 18<sup>th</sup> birthday is non statutory, however the council has a duty to publish an annual transport policy statement specifying the arrangements for the provision of travel that is considered necessary to facilitate the young person's attendance at college. The flexibility of the post 16 element of the policy is determined by the council. Although dedicated transport provision is removed from the revised policy an offer of travel assistance to support the family is being made to those that are eligible for assistance. Furthermore existing eligibility is protected until a change in an individual's circumstances.</p>

#### Section 4 - Analysis Decision (Page 11 of the guidance document)

<b>4.1 Analysis Decision</b>	<b>X</b>	<b>Reasons for This Decision</b>
There is no negative impact therefore the activity will proceed		
There are low impacts or risks identified which can be mitigated or managed to reduce the risks and activity will proceed	X	The inclusion of travel assistance for under 5's and post 19 students will have a positive impact on the service provided to children and young people residing within the borough. In addition, the process for requesting travel assistance will be aligned with the EHC process where a new plan is being considered. Where a young person has

		an EHC plan in place and is requesting travel assistance due to a change in school, individual needs, or home address a simplified one-page process will be introduced to reduce the demand of parents/carers.
There are medium to high risks identified which cannot be mitigated following careful and thorough consideration. The activity will proceed with caution and this risk recorded on the risk register, ensuring continual review		

## Section 5 – Sign Off and Revisions (Page 11 of the guidance document)

5.1 Sign Off	Name	Date	Comments
Lead Officer/SRO/Project Manager			
Responsible Asst. Director/Director			
EDI			

## EqlA Revision Log

5.2 Revision Date	Revision By	Revision Details



<b>Classification:</b> Open	<b>Decision Type:</b> Non-Key
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<b>Report to:</b>	Cabinet	<b>Date:</b> 17 April 2024
<b>Subject:</b>	Corporate Plan 2024/25	
<b>Report of</b>	Cabinet Member for Corporate Affairs and HR	

### Summary

1. This Corporate Plan sets out the strategic delivery objectives for Bury Council, in partnership with NHS GM Bury, over the next financial year. The Plan is written in the context of the Council's budget approved in February 2024 and describes how the Council aims to work alongside communities, partner organisations and businesses in support of the Borough LET'S Do It! vision to:

"Stand out as a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation".

2. The Plan is structured around three overarching priorities which, collectively, will also support the Council's financial sustainability. These are to:
  - Deliver ongoing improvements in Children's Services;
  - Drive economic growth; and
  - Tackle inequalities.
3. Success will be measured through a series of Key Performance Indicators.
4. Quarterly updates against this Plan will be reported to the Council's Cabinet in conjunction with the budget monitoring reports. This business planning function will help to continually monitor the Council's finances and service delivery effectiveness, including identifying opportunities and liabilities and the control the internal systems and structures.

### Recommendation(s)

5. Cabinet is asked to approve the Corporate Plan for 2024-25 and plans for reporting across the year.

### Reasons for recommendation(s)

6. This report sets out a clear line of sight between the in-year activities of the Council and the vision for the borough agreed in LET'S Do It! It provides clarity over the priorities for the Council which will enable effective decision making in terms of resource planning and work allocation. This will allow for clear performance management throughout the organisation, by directorate and at an individual level.

## Alternative options considered and rejected

7. N/a

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### Report Author and Contact Details:

*Name: Kate Waterhouse*

*Position: Executive Director Strategy & Transformation*

*Department: Corporate Core*

*E-mail: [k.waterhouse@bury.gov.uk](mailto:k.waterhouse@bury.gov.uk)*

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## Background

8. Welcome to the Bury Council Corporate Plan for 2024-25. This plan sets out our vision for a council that is financially sound, delivers its statutory responsibilities and contributes to the Borough's LET'S Do It! outcomes.
9. Each year priorities for the Council are agreed by Cabinet and delegated to the Council's Leadership Team to fulfil. Progress is monitored through a quarterly performance report which tracks delivery against those priorities but also monitors a broader set of key performance indicators.
10. The 2024/25 Plan also seeks to take account of the requirement for sector-based benchmarking data from the Department for Levelling Up Housing and Communities, as part of the Local Government Financial Settlement and the emerging guidance from the Office for Local Government (OfLOG).

## Introduction

11. In the summer of 2023/24 Cabinet approved a Corporate Plan based on nine priorities, of which the first three were the core focus. These were:
  - Supporting residents and businesses with the cost-of-living crisis
  - Improving Children's Lives
  - Achieving Inclusive Economic Growth
  - Improving the Health & Care System
  - Reducing Health Inequalities
  - Public Service reform
  - Tackling climate change
  - Delivering sustainable Housing Growth
  - Celebrating culture and supporting our creative sector
12. A series of SMART deliverables were defined against each priority and were largely delivered on time. The particular highlights of 2023/24 delivery are summarised below and were also reflected in a positive Corporate Peer Challenge Review from the Local Government Association, the findings from which are reported separately on this agenda:

- The “Mockingbird” model of foster care support and the Family Safeguarding model of children’s social work practice were both launched. Bury is the first OFSTED-rated inadequate authority to roll out either of these initiatives.
- The East Bury Family Hub was successfully opened in September 2023 to provide all-age prevention support to our families.
- Brookhaven special school was opened in January 2024; an important step in increasing sufficiency for children with special needs within the borough.
- The Council’s Arms Length Management Organisation for its housing stock was insourced and an improvement plan approved.
- The local housing pipeline is on track and developers have started on site for the construction of 600 new homes in Radcliffe.
- In March 2024 the Council adopted the Places for Everyone plan following an extensive consultation process.
- Around 7000 residents were provided with food and fuel support through the cost of living strategy.
- The Cultural Strategy was launched.
- All enabling works for the Radcliffe and Bury Flexi Hall Levelling Up schemes were completed and construction began in Radcliffe.

13. A small number of actions remain outstanding and will be rolled forward, for delivery in 2024/25. These are the people strategy and workforce representation strategy; a Children’s Edge of Care Service; an all-age skills strategy and social value strategy.

14. In addition, there has been a significant internal focus on financial improvement in 2023/24 including the approval of a Finance Improvement Plan and commissioning an Independent Panel to support its delivery. Under the guidance of this Panel the Council has updated its MTFS to 2026/27; produced a reserves strategy and updated the Treasury Management Strategy. Financial savings of around £18m were achieved in order to balance the Council’s budget for the last financial year, whilst protecting outcomes for Bury residents.

15. During 2023/24 the Council also managed the regrettable temporary closure of the indoor market following the discovery of RAAC. All traders were supported and those that sought relocation were enabled to achieve this. An options appraisal will continue in 2024/25 to determine how the building repairs will be managed to support the swift and successful re-opening of this important part of the market offer.

## The 2024/25 Operating Context

16. The Council is hugely ambitious for its residents and the future of our children but operates in a very challenging context. Municipal resources continue to be stretched, with the ongoing effects of c11% inflation during 2023/24 increasing costs across all services and a £30m funding gap highlighted within the 2024/27 Medium Term Financial Strategy, of which £15.1m relates to 2024/25. Post Covid, the scale and complexity of demand has also increased exponentially across all services. Children's and adult's social care services have both seen demand increases of over 20% over the last year and the housing waiting list is the longest it has ever been.
17. The Council's children's services remain in intervention from Ofsted and Department for Education. The delivery of improvement plans for children's services will continue to be a major area of focus, including improvement of services to children who have Special Educational Needs and Disabilities (SEND) and progression of the "Project Safety Valve" plan for recovery of a significant financial deficit on the Dedicated Schools Grant High Needs Block. Regulated services to adults must also prepare for potential inspection this year, from the Care Quality Commission (CQC) and the new Social Housing Regulator
18. The sub regional operating context creates some opportunities, however. The GM Integrated Care Board (ICB) operating model has the potential to better manage demand through the ongoing integration of health and care services. The Places for Everyone framework provides access to significant housing and industrial land to support growth within the borough, including Northern Gateway - once of the biggest industrial sites in the UK, which has also been designated an Investment Zone and should attract additional funding and fiscal flexibilities.
19. Previous Corporate Plans have attempted to identify the many priorities that must be addressed within this complex operating environment. Feedback from the recent Local Government Association (LGA) Corporate Peer Challenge is that such detailed plans have been unclear, however, and a much tighter set of core priorities would better assist in building engagement. On this basis, three core strategic priorities for 2024/25 are proposed, delivery of which will also secure financial stability. The priorities overlay the "business as usual" departmental functions which are described separately in service planning documents.



20. The core priorities are defined as follows:

- **Sustainable Inclusive Growth** – Further delivery of sustainable housing, the levelling up programmes, strategic regeneration along with the Local Plan, Northern Gateway Masterplan and our continued commitment to carbon neutrality.
- **Improving Children's Lives** – This priority details Educational Improvement including the three A's (Attainment, Attendance and Academisation) and the continued delivery of the SEND and Social Care improvement plans as well as a review of the Youth Justice service.
- **Tackling Inequalities** – Since the pandemic our inequalities have widened and therefore this continues to be a key priority in 2024/25 including a review of the wider determinants of health: work, housing anti-poverty, tackling behaviours that lead to poor outcomes, system wide prevention and targeted interventions within our neighbourhoods.

The specific objectives for Localities as defined in the NHS GM Planning Framework are to:

- Implement a population health management approach, delivered through integrated neighbourhood working, to deliver the evidenced based CVD and diabetes prevention interventions, focusing most on those most at risk and on those experiencing the most significant health inequalities in line with proportionate universalism
- Harness the capabilities of the Voluntary, Community, Faith and Social Enterprise (VCFSE) sector in the implementation of this population health management approach within neighbourhoods
- Work with primary care to recover long term condition management for CVD and diabetes, with a focus on CVD and diabetes, for example through 2024/25 GP Quality Scheme LCS' and Primary Care Blueprint

- Maximise prevention opportunities via integration across care interfaces at neighbourhood and locality levels and within primary, social, community, mental health and acute care settings to deliver the evidenced based CVD and diabetes prevention interventions.
  - Continue to work collaboratively at a local level, particularly with Local Government colleagues to tackle the key determinants of health and to shape the prevalence of modifiable risk behaviours.
21. A summary of the 2024/25 Corporate Plan is provided overleaf. The quarterly planned activity against these is detailed in the milestone plans below.



## 2030 Vision

1

Achieving  
Economic  
Growth

2

Reducing  
Deprivation

## Council Priorities – LET'S Do It!

**Sustainable Inclusive Growth:**

- Deliver Housing pipeline
- Levelling Up Funded sites; Prestwich; Ramsbottom & Whitefield Plans; Millgate Strategic Regeneration Framework
- Local Plan update
- Northern Gateway Masterplan
- Carbon Neutral

**Improving Children's Lives:**

- Educational Improvement (Attendance, Attainment, Academisation)
- SEND Improvement and delivery of Project Safety Valve
- Social Care Improvement (Edge of Care; Family Safeguarding Model; Fostering & Family Hubs)
- Youth - Youth Justice Review and Service refresh

**Tackling Inequalities:**

- Wider Determinants – Work, Housing, Anti-Poverty Strategy, Education, Environment and Skills
- Behaviour – Physical activity (Wellness), Food, Substance Misuse
- Prioritise system wide prevention and targeted intervention e.g. Adult Social Care, CVD Pathways
- People and Community Plans including Social Value strategy
- Social Housing Insource, Integration and Improvement

## Enabling Actions 2024/25

Refresh the LET'S vision and partnership

Complete and deliver the budget:

- Reducing demand; driving growth

Build capacity:

- Member development
- Development of people and processes in Corporate Core and Finance
- Workforce Strategy (Attraction, Recruitment and Retention)

Regulator readiness:

- Children's (Social Care and SEND)
- Social Housing
- Care Quality Commission

Future Asset Plan and Rationalisation:

- Aligned to neighbourhood model and agile working

**Shared success  
across Bury** 

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
<b>Sustainable Inclusive Growth</b>	<ul style="list-style-type: none"> <li>• Social value strategy</li> <li>• Roadmap for integration of Housing services approved</li> <li>• Local Plan Reg. 18 notification, Call for Sites and IA Scoping</li> <li>• 3 former council owned housing sites commence – c.300 houses/units</li> <li>• Strategic disposal of Spurr house (c.30 Units) procurement commences</li> <li>• Strategic partner procured for 100% affordable housing site (24 units)</li> </ul>	<ul style="list-style-type: none"> <li>• Northern Gateway masterplan approved</li> <li>• Skills strategy launched</li> <li>• Bury Flexi Hall enabling works begin; operators advise on use</li> <li>• Delivery of integrated operating model for Housing services and mock inspection</li> <li>• Supported housing site (13 units) to commence on site</li> <li>• Housing scheme of 43 units inc.18 specialist start on site.</li> </ul>	<ul style="list-style-type: none"> <li>• Prestwich Phase 1 build begins</li> <li>• Consult on draft local plan</li> <li>• Bury Market canopy construction begins</li> <li>• Radcliffe library temporarily relocated</li> <li>• Millgate planning submission Phase One</li> <li>• Strategic disposal of Humphrey House (c.65 Units) procurement commences.</li> <li>• 1 housing site complete with 30 houses/units</li> </ul>	<ul style="list-style-type: none"> <li>• Northern Gateway phase 1 planning submitted by JV</li> <li>• Radcliffe enterprise centre complete</li> <li>• Bury flexi main works begin</li> <li>• Publish Local Plan</li> <li>• Strategic disposals: Fire station; &amp; Radcliffe North Block</li> <li>• 1 town centre housing site – start on site, subject to planning (148 units)</li> <li>• Housing scheme for older people (43 units) to start on site.</li> </ul>
<b>Improving Children's Lives</b>	<ul style="list-style-type: none"> <li>• Radcliffe school build begins; Hub enabling works complete and main works commence</li> <li>• Edge of Care team launched</li> <li>• Chesham Family Hub offer</li> <li>• Review of Primary In Year Fair Access Protocol (IYFAP) Panel</li> <li>• Schools focus on Careers Information and Guidance (CIAG) and transition.</li> <li>• PSV monitoring report submission.</li> <li>• Finalise the implementation plan for Health Visitor (HV) service and begin HV recruitment.</li> </ul>	<ul style="list-style-type: none"> <li>• STAR academy in Radcliffe opens in temporary accommodation</li> <li>• Family Safeguarding impact diagnostic</li> <li>• Revised Primary IYFAP (In Year Fair Access Protocol) policy launched</li> <li>• PSV monitoring report submission.</li> </ul>	<ul style="list-style-type: none"> <li>• Establishment of 2nd Mockingbird constellation</li> <li>• Youth Justice Service review</li> <li>• Radcliffe Family Hub Offer</li> <li>• PSV monitoring report submission</li> <li>• SEND improvement planning review</li> </ul>	<ul style="list-style-type: none"> <li>• Planning submitted for free Special School</li> <li>• PSV monitoring report submission.</li> <li>• Updated multi agency safeguarding arrangements published (Working Together)</li> </ul>
<b>Tackling Inequalities</b>	<ul style="list-style-type: none"> <li>• Initiation of Intermediate Care (IMC) Services review</li> <li>• Completion of ASC self-assessment for CQC readiness</li> <li>• Redbank 3G pitch complete</li> </ul>	<ul style="list-style-type: none"> <li>• Neighbourhood model next steps including Housing integration.</li> <li>• Planning of IMC service review</li> <li>• Review of Adult Social Care (ASC) self-assessment for Care Quality Commission (CQC) readiness</li> <li>• Finalise plans for winter flu vaccination programme</li> </ul>	<ul style="list-style-type: none"> <li>• New Bury Art Museum Roof commences</li> <li>• Leisure Centre costs and options appraisal complete</li> <li>• Implementation of IMC services review</li> <li>• Compile updated information return for CQC</li> </ul>	<ul style="list-style-type: none"> <li>• Decision on future of Bury leisure services</li> <li>• Top Park 3G Pitch complete</li> <li>• Monitor and review progress of IMC services review</li> <li>• Review and refresh ASC self-assessment for CQC</li> </ul>
<b>Enablers</b>	<ul style="list-style-type: none"> <li>• Refreshed LET'S strategy</li> <li>• LET'S do it Workforce strategy</li> <li>• MTFS Delivery Plan approved, including updated transformation plans</li> <li>• Development plan for Cabinet &amp; wider Elected Members launched</li> </ul>	<ul style="list-style-type: none"> <li>• Finance improvement – updated including Unit 4 development &amp; MTFS delivery</li> <li>• Updated Target Operating Model proposed</li> </ul>	<ul style="list-style-type: none"> <li>• New Inclusion Strategy and Equality Objectives Launched</li> </ul>	<ul style="list-style-type: none"> <li>• Planning for the 2025/26 Budget Complete</li> </ul>

### **Initial suite of Key Performance Indicators**

22. The Corporate Plan will be monitored using a typical set of indicators that allows for benchmarking using tools such as LG Inform and OFLOG. However, there may also be some to develop locally to align with particular projects. It may be that some metrics are reported at the end of the year should they be measures annually rather than a quarterly report.
23. The initial suggested list of KPIs is below and further development of these will take place for the initial quarterly monitoring of the plan:

Measure		Previous		Current		Trend	Benchmark	
GROWTH	% Council Tax collected	2021/22	95.77 %	2022/23	94.98%	↓	96.02%	ENG
	% Business rates collected	2021/22	93.73 %	22/23	92.73%	↓	96.76%	ENG
	Affordable units granted final planning permission during the year	2021/22	23	2022/23	2	↓	110	ENG
	Total vacant dwellings (LG Inform)	Oct-22	2496	Oct-23	2558	↑	35031	GM
	NOMIS Claimant Count	Sept-23	4.0%	Dec-23	4.1%	↑	4.3%	NW
IMPROVING CHILDRENS LIVES	The % of pupils attending a good or better Primary School in Bury	2021/22	88%	2022/23	88%	↔	90%	ENG
	The % of pupils attending a good or better Secondary School in Bury	2021/22	46%	2022/23	62%	↑	72%	ENG
	Agency social worker rate (children's)	Sep-22	27.5%	Sep-23	34.3%	↑	21.3%	NW
	Rate of School Permanent Exclusions	2020/21	0.03	2021/22	0.14	↑	0.11	ENG
	Rate of School Fixed Term Exclusions	2020/21	4.45	2021/22	7.43	↑	8.32	ENG
	Re-registrations for children who started on a CP plan (ever) (last 6 months)	Feb-24	14	Mar-24	5	↓	24	SN*
	Rate of CLA per 10,000 children (latest snapshot)	Feb-24	80	Mar-24	80	↔	71	ENG
	CLA – Number of out of borough placements	Dec-23	52	Mar-24	52	↔	N/A	N/A
	CLA – Percentage of CLA in foster placements	Dec-23	68%	Mar-24	69%	↑	68%	ENG
	CLA – Percentage of CLA in own provision	Dec-23	45%	Mar-24	44%	↓	44%	ENG
	Percentage of CSC assessments completed in 45 working days	2021/22	87%	2022/23	92%	↑	82%	ENG

TACKLING INEQUALITY	EHCP: Percent of Plans issued on time, compliance at 20 weeks	2021	34.2%	2022	51%	↑	47.6%	ENG
	Proportion of 16- and 17-year-olds who were not in education, employment or training (NEET)	2022	3.4%	2023	3.9%	↑	3.5%	NW
	17 to 18 year old care leavers not in education, employment or training	2021/22	16%	2022/23	16%	↔	28%	ENG
	Rent collection rate (%)	2021/22	99%	2022/23	100%	↑	98%	NW
	ASCOF 2A - The proportion of people who received short-term services during the year - who previously were not receiving services - where no further request was made for ongoing support	Sep-23	81.0%	Dec-23	80.0%	↓	67.4%	NW
	Proportion of people receiving long-term adult social care in the community	Sep-23	71.5%	Dec-23	72.0%	↑	72.9%	NW
	Median days on waiting list for ASC needs assessment	Nov-23	63	Feb-24	41	↓	45.6	GM
	Proportion of those that received short-term service during the year where sequel was either no ongoing support or support of a lower level	2021/22	71.5%	2022/23	78.8%	↑	74.2%	SN*
	The amount (kg) of residual household waste per household	2020/21	399.5 kg	2021/22	352.7 kg	↓	501.1 kg	ENG
	Percentage of household waste sent for reuse, recycling or composting	2021/22	53.8%	2022/23	52.6%	↓	45.3%	NW
	Number of potholes repaired	Jul-23	551	Oct-23	332	↓	NA	NA
	Highway repairs completed on time (%)	Jul-23	73%	Oct-23	80%	↑	NA	NA
	Average time taken to repair street lighting	Jun-23	68	Sep-23	69	↑	NA	NA
	Number of missed bin collections per 100,000	Dec-23	113	Mar-24	115	↑	NA	NA

ENABERS	% Annual PDRs completed in previous 12 months (Bury Council)	Dec-23	59.2%	Mar-24	58.4%	↓	100	Target
	Sickness absence: average number of days lost per FTE per year (Bury Council)	Dec-23	14.68	Mar-24	13.71	↑	9.85	Target
	Pulse Survey - Positivity of base questions – Q1 to Q5	Oct-23	82.3%	Mar-24	83.8%	↑	NA	NA
	Contact Centre – number of contacts received (monthly average)	Q3 2023/24	17072	Q4 2023/24	18916	↑	<20000	Target
	Contact Centre - Council Tax – % of calls answered	Q3 2023/24	74%	Q4 2023/24	67%	↓	85%	Target
	Contact Centre - Operational and Environmental Services - % of calls answered	Q3 2023/24	84%	Q4 2023/24	78%	↓	85%	Target
	% of FOIs completed on time (Bury Council)	Q2 2023/24	99%	Q3 2023/24	85%	↓	100	Target
	Number of SARs overdue (Bury Council)	Sep-23	12	Dec-23	17	↑	0	Target

\*SN – Statistical Neighbours

## Reporting mechanisms

24. It is proposed that the Corporate Plan will continue to be monitored quarterly as per usual process with an indication of progress both against delivery milestones and key performance indicators. The priority tier of indicators will be monitored using a Power BI dashboard that will be included in the monitoring reports. This dashboard will include national benchmarking sourced from LG Inform.
25. The Corporate Plan KPIs will form part of the golden thread for reporting from departments from within the Council following upwards into the LET'S strategy. Departments will develop their own service plans which will be supported by dashboards for internal monitoring of day to day business.
26. Performance and progress will be reported internally monthly at the Senior Leadership Group.

## Recommendation

27. Cabinet is asked to approve the Corporate Plan for 2024-25 and plans for reporting across the year.

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## Links with the Corporate Priorities:

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

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## Equality Impact and Considerations:

29. Full EIA completed and signed off. Overall neutral impacts identified but an acknowledgement that individual actions and initiatives within the plan may need to be individually assessed when appropriate.

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## Environmental Impact and Considerations:

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

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## Assessment and Mitigation of Risk:

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

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**Legal Implications:**

31. There are no legal implications arising from the report however the Corporate Plan forms a fundamental part of our governance assurance to Members.

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**Financial Implications:**

32. There are no direct financial implications arising from this update report, although there are several key finance performance targets and savings delivery targets.

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**Appendices:**

None.

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**Background papers:**

None.

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

Term	Meaning





<b>Classification:</b> Open	<b>Decision Type:</b> Non-Key
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<b>Report to:</b>	Cabinet	<b>Date:</b> 17 April 2024
<b>Subject:</b>	Local Government Association Corporate Peer Review	
<b>Report of</b>	Cabinet Member for Corporate Affairs and HR	

### Summary

1. As part of the Council's commitment to continuous improvement, the Local Government Association were invited to Bury in December 2023 to undertake a full Corporate Peer Challenge (CPC). It is expected that all councils will receive a CPC at least every five years.
2. This visit was intended to assess progress since the last full CPC in 2018, and in particular to validate actions taken through the Finance Improvement Plan to deliver a balanced Medium Term Financial Strategy in for Full Council in February 2024.
3. This report summarises the approach taken by the Local Government Association and the feedback received from the Peer Review Team. It also incorporates the recommendations that have been received and the commitment to action these through the Council's 2024/25 Corporate Plan.

### Recommendation(s)

4. That Cabinet note the progress made by the Council as captured in the Position Statement and Full Report from the Local Government Association.
5. That Cabinet agree that the recommendations from the Challenge are accepted by the Council and incorporated into the 2024/25 Corporate Plan.

### Reasons for recommendation(s)

6. As participating in the Corporate Challenge is done through mutual agreement with the Local Government Association there is an expectation that all councils having a corporate peer challenge will commit to publishing the feedback report and an action plan. This report fulfils that obligation.

### Alternative options considered and rejected

7. None applicable.

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## Background

8. In December 2023 the Local Government Association visited Bury Council with a Peer Review Team to undertake a mutually agreed Corporate Peer Challenge (CPC). Undertaking a CPC is a robust and rigorous assurance and improvement tool, managed and delivered by the sector, for the sector. They are designed to complement and add value to a council's own performance and improvement focus. The peers used their experience and knowledge of local government to reflect on the information presented to them by the people they met, the things they saw and the material that they read. The Peer Review Team provide feedback as critical friends, not as assessors, consultants or inspectors.
9. It is expected that all councils will receive a CPC at least every five years. Each CPC has a focus on five core questions with the opportunity to add a local priority, which for Bury Council was specific feedback on its financial standing and approach to financial improvement. The five standard areas of exploration were as follows:
  - **Local priorities and outcomes** - Are the council's priorities clear and informed by the local context? Is the council delivering effectively on its priorities?
  - **Organisational and place leadership** - Does the council provide effective local leadership? Are there good relationships with partner organisations and local communities?
  - **Governance and culture** - Are there clear and robust governance arrangements? Is there a culture of challenge and scrutiny?
  - **Financial planning and management** - Does the council have a grip on its current financial position? Does the council have a strategy and a plan to address its financial challenges?
  - **Capacity for improvement** - Is the organisation able to support delivery of local priorities? Does the council have the capacity to improve?
10. The Peer Review Team who visited Bury consisted of seven external peers, including a chief executive from a metropolitan borough in the North East, a deputy chief executive and two Council Leaders. The team also included a former Executive Director of Children's Services given Bury Council's commitment to improving Children's Lives and the need to ensure sufficient corporate focus on the Children's Improvement Plan.
11. Bury Council last undertook a full CPC in 2018 and with a subsequent follow up visit in 2021, just as the Covid restrictions were being lifted and there was a move from response to recovery. At the time the Peer Review Team provided the Council with a series of recommendations to set a clear and concise strategic plan which provided a roadmap for place leadership whilst allowing for a focus on getting the basics right within internal operations, particularly within corporate services.

## **CPC Feedback**

12. During the December 2023 visit the Peer Review Team gathered information and views from more than 60 meetings, in addition to further desk-based research and data analysis. They spoke to more than 150 people including a range of Bury Council staff, together with members and external stakeholders.
13. Their work was also influenced by a comprehensive Position Statement which is included as an appendix to this report. During the visit the information provided in this self-assessment was verified through further data analysis and interviews with staff and partners.
14. Based on this analysis, the Peer Review Team were able to comment on a much-improved Council to the one they visited in 2021. Their overall observations were that they found:
  - A Council that had “really stepped-up” in its place leadership role.
  - A clear vision for inclusive growth and reducing inequalities which was widely known and understood.
  - Evidence of delivery of some ambitious regeneration schemes with the Council “as a strong partner” who fosters collaboration.
  - A Leader and Chief Executive who are “highly regarded” both locally and in Greater Manchester more broadly and with the NHS GM Integrated Commission Board (ICB).
  - A hard working, dedicated team with a strong work ethic, “where people care very deeply about what they do”.
  - A respectful nature to politics which has helped move the Council forward.
  - Strategic positioning within the NHS GM ICB and good operational performance in Adults and Health.
  - Good examples of teams working together at a neighbourhood level which they described as “innovative and brave”.
15. Overall they concluded that **“People can see how Bury as a place is changing and are really positive about the difference this represents”**.
16. Of note, against the five core headings the report highlights are set out below.

## ***Local priorities and outcomes***

17. The Peer Review Team reflected that “LET’S Do It!” is a well-recognised and unifying strapline across the Council’s staff and its partners. The ‘LET’S Do It! Challenge’, which had seen over 1,200 staff, elected members and partners take part in an immersive organisational development aimed at helping people to better understand the purpose behind the borough strategy, was described as impactful, creative, playful and emotive. It has helped to connect people to the ‘LET’S Do It!’ call to arms and created a buzz about this locally. This is an example of how the Council is seen to have “moved on a lot from old fashioned approaches to a culture focused on serving residents”.

18. The team observed particularly strong partnership working with the Health and Care Sector, within the broader context of the Bury Public Service Reform model and the creation of the NHS GM ICB. The Council was described as being “on a journey of innovative, integrated neighbourhood working” and the geographical opportunity to cluster teams into local population sizes through our neighbourhood model was endorsed.
19. To capitalise on this momentum, the Peer Review Team identified the need to “re-tell” the LET’S Do It! vision in a way which recognises that the “context for the borough is now different to when this document was originally written” and reenergises the wider partnership to double-down on achieving the outcomes. This will include further leadership and facilitation for the Council, including strengthening the role of Cabinet Members as part of the professional network that the borough draws on to deliver it’s ambitions within a complex working environment.
20. The Peer Review Team also observed that the Council is working towards too many priorities and the Corporate Plan was regarded as overly complex. A focus on a smaller, sharper number of priorities will better secure staff and partner engagement.

### ***Organisational and place leadership***

21. The Peer Review Team heard from partners that Bury has recently “stepped up” its place leadership role and is a well-regarded partner within Greater Manchester. In particular, it is playing a positive leadership role in progressing Atom Valley and the Northern Gateway which are significant long-term inclusive growth opportunities for the borough and Greater Manchester more broadly.
22. The Team observed that the Council has a number of impressive local regeneration schemes. Of note is the funding base for many of these schemes, through Government grants and/or Council borrowing, as well as delivery in partnership with private sector partnerships through two Joint Venture Partnerships and the business leaders’ network. Plans were described as “ambitious” and due to deliver “significant assets” to the borough, although capacity to progress was observed to be very tight. Advice was given to strengthen delivery teams to ensure success.

### ***Governance and culture***

23. The Peer Review Team were able to see how the LET’S Do It! vision and values were shaping the culture and influencing the governance structure within the Council and wider Team Bury partnership. It was, however, also observed that the Council has an unnecessary habit of “talking itself down” and continually referencing historical difficulties which the Team felt the Council has now moved past.
24. Improvements were noted in the Council’s approach to quality and inclusion, with recognition of the contribution of “a strong and committed working group”.

It was observed that there remains more work to do, however, particularly in terms of workforce representation, the action on which is an outstanding recommendation from the 2023/24 Corporate Plan.

25. It was recommended that the governance structure of the Council should be organised around key priorities, to better inform the allocation of resources. Within this, planning for the next municipal year to ensure that the Overview & Scrutiny and Audit Committees work programmes are aligned to corporate plan priorities is an important next step in further strengthening governance and culture. On the basis of risk, particular attention is required to Housing Services and the quality of social services in children's service, adult care and SEND.

### ***Financial planning and management***

26. During the visit in December the Peer Challenge Team were able to observe that the Council was in an "extremely challenging financial position, with a small window of opportunity to act". The actions within the voluntary Finance Improvement Plan were endorsed, but it was agreed to be too soon to validate the impact. Since the Corporate Peer Challenge, the Council has set a budget for 2024/25 and agreed a Medium Term Financial Strategy (MTFS), albeit through the use of reserves and a commitment to identify further savings across the next three years.
27. The Peer Team acknowledged the challenge of funding social care, which is being experienced across the sector but is particularly acute in Bury as an authority subject to a Children's Services Improvement Notice. Finalising an appropriate budget for Children and Young People, which allows for investment in improvement whilst sustaining funding across other Council services, was recognised as the primary challenge and one which required detailed modelling within the MTFS and a "One Council" approach to ownership across all services.
28. The Peer Review Team also reviewed the Council's Capital programme and found that this is an area which would benefit from additional review to ensure a realistic profile of investment, borrowing and returns on investment can be achieved within the MTFS. This work is included in the Financial Improvement Plan.
29. The Peer Review Team were keen to stress the importance of recruiting to a permanent senior management structure in finance and ensuring the whole organisation, including Elected Members, continue to own the commitment to designing a financially sustainable council, fit for the future.

### ***Capacity for improvement***

30. Throughout their visit to the borough the Peer Review Team commented on many examples of "people going above and beyond their roles to help deal with the demands and pressures the council faces to support local communities".

31. Improvements in staff engagement as evidenced through the Pulse survey were backed up with case studies from staff and by feedback from partners who commented on “the Council has changed in recent years” and become “less focussed on providing internal services” and become an organisation that is “there to listen to and work with local communities”.
32. The visit of Peer Review Team coincided with the final planning stages for the transfer of the Council’s Housing Services back to the direct management of the local authority. Whilst recognising that this would provide “opportunities to improve the offer to local tenants, as well as support local communities more widely”, the resource and risk implications for the Council need to be fully reviewed, especially alongside existing commitments to regeneration, improvement and transformation.
33. Further strengthening the Council’s resources to be able to deal with these challenges will require a workforce strategy which accelerates work to retain, recruit and develop staff, enabled by corporate services which are transformation focussed and digitally enabled. To achieve this, it was recommended that the Council should articulate its transformation ambition as an implicit part of the MTFS, to improve outcomes and as a lever to reduce cost.

### **Action Plan**

34. In their report back to the Council the Peer Review Team recognised that the borough of Bury is changing and that the Council’s focus on inclusive growth and reducing inequality is well recognised by those inside and outside. The ambitious delivery programme behind the LET’S Do It! Vision was endorsed, but a range of recommendations made to ensure that the ambitions of the Council and wider Partnership are delivered through appropriate resource, resilience and relentless focus.
35. The Peer Review Team agreed 13 recommendations with the Council which have been embedded within the Corporate Plan for 2024/25. These will be monitored through a separate Action Plan as required by the Local Government Association. The recommended actions are as follows:
  - Refresh your 2030 strategy, using this to tell the story as a positive vision, based on the strengths and assets that now exist locally.
  - Sharpen up the priorities for the council and use them to shape decision making processes and resource allocation consistently.
  - Establish a ‘One Council’ culture and ways of working to better position the council in dealing with its challenges and achieving its priorities across the short, medium and longer term.
  - Develop a single, clear and robust MTFP for the council. Ensure everyone understands this and what it means.
  - Establish a corporate transformation plan, approach, resource and culture to support delivery of your MTFP.

- Further develop finance, HR and IT – including their role and the relationships they require. These services are key to enabling the delivery of the council's transformation needs.
- Work with the finance team to further develop a capable team into a stable and supported finance function – including moving quickly to appoint permanent leadership to work with the interim CFO.
- Build the resilience of the Children's Leadership Team – including appointing to the vacant senior officer posts.
- Take steps to help further support and develop the Cabinet team.
- Ensure the council's inclusive growth ambitions are suitably resourced to see them realised.
- Start to prepare a new Local Plan to complement the Greater Manchester Places for Everyone Plan.
- Plan for the risks and opportunities around Six Town Housing in realising the changes the council seeks from this move.
- Support the further development of risk and audit within the council. This includes the use of the Corporate Risk Register, the role of Internal Audit and the development of the Audit Committee.

36. These recommendations have been reflected within the 2024/25 Corporate Plan and will be monitored as a standalone Action Plan to ensure appropriate resource allocation. This action plan is summary in Appendix One of this report.
37. The Local Government Association will undertake a return visit in Quarter Three 2024/25 to assess progress. A full copy of the report is available here: [LGA Corporate Peer Challenge: Bury Council | Local Government Association](#)

### **Recommendations:**

38. That Cabinet note the progress made by the Council as captured in the Position Statement and Full Report from the Local Government Association.
39. That Cabinet agree that the recommendations from the Challenge are accepted by the Council and incorporated into the 2024/25 Corporate Plan.

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### **Links with the Corporate Priorities:**

40. The LGA CPC is an important mechanism for assessing the Council's capacity to play it's part in the delivery of LET'S Do It! The report concludes that Bury Council is a strong partner demonstrating place leadership in promoting the vision and ensuring wider understanding of, and commitment to, the ambitions. The Council needs to ensure that it continues to resource it's priorities to maintain this position and ensure the delivery of the 2030 Strategy.

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### **Equality Impact and Considerations:**

41. N/A

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**Environmental Impact and Considerations:**

42. N/A

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**Assessment and Mitigation of Risk:**

Risk / opportunity	Mitigation
Lack of capacity to deliver against the Corporate Plan priorities and specifically the CPC recommendation which reduces our ability to achieve the LET'S Vision and achieve financial sustainability.	Further attention will be given to the activities identified within the CPC feedback to ensure that resources are used to appropriately to support priorities as these underpin the Council's ability to deliver the wider Corporate Plan.

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**Legal Implications:**

43. There are no legal implications arising from this report. This report fulfils our obligation to the LGA to report on the peer review findings.

**Financial Implications:**

44. There are no financial implications arising from this report.

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**Appendices:**

Appendix One: LGA Peer Review Action Plan  
Appendix Two: LGA CPC Self-Assessment Position Station  
Appendix Three: LGA CPC Feedback Report

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**Background papers:**

None.

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

Term	Meaning



## Appendix One: LGA Peer Review Action Plan

LGA CPC Recommendation	Owner	Milestone	Status
Refresh the 2030 strategy, using this to tell the story as a positive vision, based on the strengths and assets that now exist locally.	ED Strategy & Transformation	Publication of revised strategy by end of Q1 2024/25	In progress
Sharpen up the priorities for the council and use them to shape decision making processes and resource allocation consistently.	ED Strategy & Transformation	Publication of the Council's Corporate Plan in April 2024	Complete
Establish a 'One Council' culture and ways of working to better position the council in dealing with its challenges and achieving its priorities across the short, medium and longer term.	Director of People & Inclusion	Workforce Strategy complete end Q1	In progress
Develop a single, clear and robust MTFP for the council. Ensure everyone understands this and what it means.	ED Finance	MTFP approved by Cabinet and 2024/25 budget set Delivery Plan for MTFS to be included in Q1 Budget Report to Cabinet	Partially complete
Establish a corporate transformation plan, approach, resource and culture to support delivery of your MTFP.	ED Strategy & Transformation	Transformation programme specified within MTFS delivery plan at end Q1 as above Updated Target Operating Model including transformation by the end of Q2	In progress
Further develop finance, HR and IT – including their role and the relationships they require. These services are key to enabling the delivery of the council's transformation needs.	ED Strategy & Transformation	Corporate Core Departmental Plan approved by end of Q1	In progress
Work with the finance team to further develop a capable team into a stable and supported finance function – including moving quickly to appoint permanent leadership to work with the interim CFO.	ED Finance	Director of Finance appointed by end of April 2024. Finance Improvement Plan on track	In progress

Build the resilience of the Children's Leadership Team – including appointing to the vacant senior officer posts.	ED Children & Young People	Recruitment to vacant senior posts completed by the end of Quarter One; team building capacity arranged	In progress
Take steps to help further support and develop the Cabinet team.	Director of Law & Democracy	Business and policy support resources in post Member Development Plan agreed by DAF by June 2024 Cabinet Member Development delivered from May 2024 onwards.	In progress
Ensure the council's inclusive growth ambitions are suitably resourced to see them realised.	ED Place	Access to capital receipts for additional fixed term surveying capacity agreed through refreshed Future Assets Plan. Resources for Northern Gateway delivery being determined via GM	Complete
Start to prepare a new Local Plan to complement the Greater Manchester Places for Everyone Plan.	ED Place	Working Group established; draft available as a basis for consultation in Q3 for approval Q4	In progress
Plan for the risks and opportunities around Six Town Housing in realising the changes the council seeks from this move.	ED Strategy & Transformation Director of Housing Operations	Housing Improvement Plan tracked via Housing Advisory Board and internal Review Group. Roadmap for integration approved by the end of Q1 2024/25	In progress
Support the further development of risk and audit within the council. This includes the use of the Corporate Risk Register, the role of Internal Audit and the development of the Audit Committee.	ED Finance Director of Law & Democracy	Refreshed training delivered to Senior Leadership Group in April 2024. Work programme of Internal Audit reviewed considering the new Corporate Plan in Quarter One 2024/25.	In progress



**LGA Corporate Peer Challenge  
Bury Council**

28<sup>th</sup> November – 1<sup>st</sup> December 2023

**Bury**  
Council

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## 1 Introduction

Bury Council would like to welcome the LGA Corporate Peer Challenge Team to our brilliant and busy borough at a challenging time for local government and the wider public sector. We are proud of what we have achieved since the LGA were last with us for a full Corporate Peer Challenge in 2018 and the subsequent follow up visit in 2021 and are looking forward to sharing our progress with you.

In 2020 we launched our aspirational and ambitious LET'S Do It! Community Strategy, setting out a vision for the borough through to 2030: **to stand out as a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation.**

Since then, both Bury Council and the wider Team Bury Partnership have worked together to transform our collective response to public service reform and to increase our focus on the seven high level outcomes committed to within the Strategy. There is now a much stronger "golden thread" that binds our collective endeavour.

These achievements have been made in conjunction with responding to the unprecedented impact of a global pandemic and dealing with the impact of a cost-of-living crisis, which has deeply affected our communities and businesses. Instead of allowing these events to derail our commitment to the 2030 we have used the LET'S principles to redouble our efforts and remain focused on the long-term objectives:

- **Local** – Launching our Neighbourhood Model to ensure residents are at the heart of our decision making and delivery.
- **Enterprise** – Working creatively to become the only local authority to be awarded two Levelling-Up Grants to regenerate our most deprived areas.
- **Together** – Continuing to build a local health and care system within the GM ICS to maintain our focus on reducing health and inequalities.
- **Strengths** – Bury has a heritage of people looking after people. Our award-winning community groups continue to inspire and energise us.

During your time with us you will learn more about our new approach to staff engagement, organisational development and partnership working. Whilst acknowledging the challenges faced by our staff and our partners, we have also looked to celebrate the successes, commending those who have worked tirelessly in the support of residents and those who continue to provide high quality public service.

Much of our approach builds on the recommendations made in our previous Corporate Peer Challenge reviews and has been co-designed with our stakeholders to ensure that it meets the needs of our neighbourhoods and the diverse communities which give Bury its own unique culture and identity.

We hope you enjoy your time in our beautiful borough and get chance to experience the passion and the pride of those who live, work and invest here.

**LET'S Do It!**

## LET'S Do It Challenge



Between June and August 2023, over 1200 staff, elected members and partners took part in our LET'S Do It! Challenge, a fully immersive organisational development activity designed to help people understand the purpose behind the strategy and what they could do individually, and as a team, to help achieve the 2030 vision. Find out more later!



## 2 Local Priorities and Outcomes

Bury is nearly three years into a decade of reform and good progress has been made. The Council's priorities and delivery are managed each year through a Corporate Plan. For the last three years a framework of the "3Rs" has been used to direct activity: Response; Recovery and Renewal.

The table below sets out the Corporate Priorities for 2022/23 which were informed by the feedback from the LGA that the Council needed to be clearer on its objectives and that LET's Do It! did not mean "*Let's do everything*".

Response	Recovery	Renewal and Regeneration
<ul style="list-style-type: none"> <li>Update the poverty reduction strategy including an urgent response to the <b>cost-of-living</b> crisis, for residents &amp; businesses</li> <li>Supporting the <b>health and care</b> system to reduce waiting times, improve access and lessen inequalities, working through the Bury Integrated Care Partnership and in the GM ICS.</li> </ul>	<ul style="list-style-type: none"> <li>Strengthened partnership working with parents and schools including reducing the <b>Dedicated Schools Grant deficit</b>.</li> <li>Beginning the development of <b>people &amp; communities plans</b> for each of our neighbourhoods, including the pilot of a Family Hub.</li> <li>Delivery of the <b>children's OFSTED improvement plan</b>.</li> <li>Work with stakeholders to deliver the <b>SEND</b> improvement plan</li> </ul>	<ul style="list-style-type: none"> <li>As part of the <b>Economic Development Strategy</b> ensure delivery of our <b>strategic regeneration sites</b> in Prestwich, Ramsbottom, and the Radcliffe Strategic Regeneration Framework, including the Bury and Radcliffe Levelling Up Schemes</li> <li>Production and delivery of the <b>all-age borough skills</b> strategy</li> <li>Delivery of the brownfield <b>housing</b> programme.</li> <li>Implementation of the <b>Climate Change</b> programme</li> </ul>
<b>Strengthening the Basics</b> Delivering quality, value for money services which residents can rely on		
<b>Enablers</b> Organisation Development; Internal Transformation; Balancing the Budget; Driving Inclusion		

Delivery against each objective was summarised in a report to Cabinet in March 2023:

<https://councildecisions.bury.gov.uk/documents/s34599/Bury%20Council%20Corporate%20Plan%20202324%20Strategic%20Framework.pdf>

Priorities for 2023/24 continue much of the work described above in relation to strategic economic development; the improvement of children's services; health and care reforms and internal improvements. Corporate objectives also continue to be driven by the commitments within LET'S Do It!, ensuring that we contribute to the seven core outcome measures which are explained in more detail later in this document:

1. Improved quality of life
2. Improved early years development

3. Improved educational attainment
4. Increased adult skill levels and employability
5. Inclusive economic growth
6. Carbon neutrality by 2038
7. Improved digital connectivity

In this context **local strategic priorities** for 2023/24 ahead are summarised as:

- Delivery of the £31m budget savings to balance the Council's budgets.
- Maintaining the children's improvement journey, including demonstrable reductions in the DSG deficit; improvements in SEND provision and achieving a focus on partnership and compliance in year two of the children's social care Ofsted improvement journey.
- Completion of the ICS transition and delivery of the health and care reforms.
- Continuing the delivery of our Anti-Poverty Strategy to support residents with the cost of living.
- Ongoing delivery of the physical regeneration work with the completion of all enabling works and progressing the two Levelling Up sites.
- Delivery of housing schemes and completing the options appraisal of the Council's housing management company, Six Town Housing.
- Mobilising the inclusive growth vision as a whole Council agenda, including delivery of the all-age skills strategy; a strengthened and evidence-led focus on people and community plans by neighbourhood.
- Embedding the LET'S values and behaviours across the Council workforce and continuing to drive staff engagement and high-quality leadership and management.
- Commencing delivery of the wellness strategy, including the pilot of a community-led approach in Radcliffe. A new borough culture strategy will be an implicit part of the future wellness offer.

The Council will also continue to influence and direct **local delivery of GM strategy** including:

- Clean Air reforms will continue through the leadership of the Clean Air Steering Group, including implementation of an investment-led non-charging approach,
- Implementation of GM devolution trailblazer scheme including the single block grant agreement and potential for new powers in housing,
- The Places for Everyone scheme which, if approved, would deliver over 3,500 new homes in the Borough. A planning application will be made in late 2023 with a view to potential determination mid-2024, and
- Development of Northern Gateway within the Atom Valley Mayoral Development zone.

These are priorities are summarised in our Plan on a Page overleaf.



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

## 2.1 Performance Management

Delivery against the Corporate Plan is monitored through monthly reporting by Executive Directors to their Cabinet Member and Chief Executive. Formal reports are presented on a quarterly basis to Cabinet with additional analysis via the Performance and Finance Sub-Group of our Overview and Scrutiny Committee: <https://councildecisions.bury.gov.uk/ieListDocuments.aspx?CId=126&MIId=3445&Ver=4>

These reports contain a blend of business activity information and key performance indicators to track demand and impact on services. These performance dashboards are still in development in order to:

- Reflect targets and commitments within the Greater Manchester Strategy Performance Framework.
- Feed into the Seven Outcomes measures within LET'S Do It!
- Provide relevant benchmarking against appropriate comparators.
- Allow for target setting where appropriate.

Department level plans mirror the format of the Corporate Plan and are reported against quarterly at the Senior Leadership Group, made up of Executive Directors and their direct reports. These are in turn used to support the product of Service Level Plans where needed and then individual performance objectives. This “Golden Thread” is summarised in the diagram below:



The most recent performance report demonstrates the challenging context for current delivery, with economic and societal pressures contributing to increased demand for services, whilst Council capacity contains to be curtailed by budget pressures.

## 2.2 Workforce Development

We know that one of our biggest challenges remains staff engagement which has been focus of the Director of People and Inclusion and the newly appointed Head of Organisational Development and Culture. However, it is a collective endeavour for all of our members and senior managers.

In 2022 we launched a new quarterly 'Pulse Survey'. The first wave was responded to by 27% of the workforce and provided a baseline for us to build on. Compared to the last Staff Survey that had been conducted in 2018, 81% of staff felt encouraged to respectfully express their opinions and ideas, a significant improvement from 2018 when only 50% of council staff felt that way.

Key themes which have come through the survey have been discussed previously with the LGA, including the need for prioritisation and to be clear about what we expect from staff and what staff expect from us in terms of their wellbeing. Over the last twelve months this has led to focus on refining the Corporate Plan as outlined above, but also on being clear on the behaviours we have jointly agreed with staff as part of our LET'S Value Statements:

- **Local:** I'm proud to make a difference to people and communities in the neighbourhoods where they live.
- **Enterprising:** I strive to develop and improve; to play my part in delivering great solutions with the people of Bury.
- **Together:** My work is shaped in an inclusive way, with dignity, kindness and respect; developed together by those with lived experience.
- **Strengths:** I'm proud to build on the strengths of Bury people, my colleagues and myself to deliver.

Through a focus on promoting the survey, and it's impact, the response rates by the fourth wave had improved to 32% (just over 800 staff). Overall engagement is continuing to improve and we have seen a positive direction of travel over the year on our core measures. Despite the current financial climate and significant changes, the number of staff who would recommend the organisation to friends / family seeking employment was at its highest (66%), as was perceptions of work/life balance (69%).

The results of our most recent wave of the survey will be available to the Peer Challenge Team on arrival. The results of the surveys so far have provided the evidence for a programme of work which has included:

- In 2022 we held our first **LET'S Do It Brilliantly! Staff Awards** with over 300 nominations themed around the LET'S values. Attended by the Mayor of the Borough and the Leader of the Council, staff winners were awarded with the now much sought after "LET'S Do It!" Hoodies.
- We have reshaped our **internal staff communications** using Live Briefings with the Chief Exec and Directors as the flagship touch point, but backed up with more structured engagement routes including the launch of Workforce Wednesdays where we share advice on maximising staff wellbeing, signpost



to support to on developing skills and careers and provide more resources to be consciously inclusive. We also have monthly “Shout Out” emails to celebrate the contribution of staff.

- Clear feedback has come through the Pulse Survey that core **HR policies and procedures** needed to be easier to follow and understand stand to ensure that managers and their staff were clear on roles and responsibilities. This has now been done via a new Employee Handbook and updated policies for Recruitment, Redeployment, Pay Protection and Annual Leave.
- Whilst the Council has had a long established **Change Agent Network** we have responded to feedback that the group wished to play a more active role in improving systems and processes in the Council and as such they have taken on a key role in the Council’s Transformation Programme. Through supporting the introduction of Office 365 our Change Agents have become Digital Champions with over a hundred members of staff supporting their peers to work more productively and to use the new tools with more confidence. This has allowed us to introduce a new e-mail retention policy and improved our information governance.
- One of the early outcomes from the **Pulse Survey** was that some staff were not clear on what was expected of them at work. In addition to improving the specificity of the Corporate Plan, a new Management Development Programme has been launched which has now had over 100 participants. The programme has focused on staff development and management skills to enable this cohort to support their teams and undertake more effective business planning. However, we know that this is still a challenge for us. At the end of Quarter Two only 53% of our Employee Reviews had been completed. As this annual conversation is the cornerstone of our employee engagement we know we have more to do.

One of our proudest achievements since the last Peer Challenge has been the development of our LET’S Do It! Challenge. This has been an in-house piece of organisational development, delivered at little cost, in response to staff feedback that they still were not clear on what the vision really meant for them in the context of their day-to-day lives. The development of an immersive experience to help bring the LET’S strategy to life has been hosted at the Greater Manchester Fire and Rescue Training Centre and has been attended by over 1200 staff, councillors and stakeholders over the summer of 2023. Taking two hours, each tour explains the rationale for the strategy and what we mean by each of the behaviours and how they can be applied to all roles within the Council.

Structured around the four LET’S values the experience has been delivered by an internal set of Staff Guides. Nominated by their managers, and often previous Staff Award winners, these staff have been our advocates and have delivered the training on a peer-to-peer basis which has created a much greater sense of ownership of the strategy. We are continuing to evaluate the impact of the experience however evidence suggests it has been well received and has inspired many of our staff to embrace the LET’S Do It challenge and pledge their commitment to improving the life chances of the borough’s children by 2030.

**LET'S Challenge ... Staff Pledges**

Around 10,000 Bury children will be 18 in 2030.  
What will you do to make sure Bury's next generation share in our success?'

I will promote the importance of financial prevention to young people in the aim to ensure they would reach adulthood. Teaching budgeting skills to college students to prepare them to face university life.



In the job that I carry out daily I would encourage the children to attend education for them to be able to succeed, for the children to feel safe and happy on their journey to school.

Go out into schools and talk about Bury, why its a great place to live and study etc.

Help out at recruitment events to promote Bury council and tell them how amazing we are ... Shout from the roof tops about how amazing Bury is and make all our Bury children aware.

Encourage further climate action activities within schools and among young people. Ask young people what they want to see their area doing to combat the climate crisis.

As a parent of 2 children, one who will be 16 in 2030, I want to support colleagues to develop services for children with ASD, ADHD and other SEND provision

Continue taking on as many apprentices as possible into a service which is struggling to attract the younger generation

I am in the process of becoming a corporate parent ... I intend to help her refurbish her first home and we are going charity shopping together as she loves that activity.

Go out into schools and talk about Bury, why it's a great place to live and study etc.

**Bury**  
Council

## 2.3 Community Engagement

Post Covid-19 the Council has remained committed to supporting and facilitating our community and voluntary sector to continue to work with our residents by strengthening community assets and ensuring help is targeted where it is most needed. The Team Bury approach to **Public Service Reform** builds on the principles of the LET'S strategy and has seen a commitment to support our five neighbourhoods to develop their own, distinct Public Service Leadership Teams, focusing resource on the priorities identified within each of their People and Community Plans.

Whilst this model builds on the Community Hubs which were established during the Pandemic, the model is intended to take a sustainable approach to community development that is grounded in the principles of taking a person and community centred approach so that public services do not get in the way of communities helping themselves. The voluntary, community and faith sector in Bury has strengthened under the new leadership within our third sector infrastructure organisation and also the further development of wider grass roots community-based organisations. Below are four examples of this approach in action.

- Cost of Living:** Since the launch of the Council's Anti-Poverty Action Plan, three Cost-of-Living summits have been held to ensure that the pledges are being delivered in conjunction with residents and communities. The Council is using around £3m from the government's Household Support Fund and money from the Council's budget on a range of support for residents and community groups to help them through the cost-of-living crisis. This has included providing food and fuel vouchers, supporting community and voluntary groups who are running food banks and pantries, and also to organisations offering crisis support. Through listening to residents it is clear that finding well paid, good jobs is seen as the longer-term solution. Working together with employers, the Department for Work & Pensions and local skills providers, residents have also been supported with their skills and employment through workshops, interview support and help with improving digital skills to be able to access opportunities and apply for work.
- Family Hubs:** At the end of October 2023 Bury Council opened it's first family hub in one of our most deprived neighbourhoods, Bury East. Based on consultation and co-design with children and families the space will provide a physical hub, providing support for the whole family from the Council's early years team, youth services, healthcare, alongside other community services. From agreeing the priorities for services to be run from the centre, right through to selecting the colour of the rooms and the furniture, this project has been jointly designed and delivered with our community and provides a model for future community hubs. Underpinning this work is Bury's commitment to implementing the Family Safeguarding Model which is a partnership approach to working with families to help children remain safely at home. Bury Council is the first local authority in Greater Manchester to implement the new **Family Safeguarding Model**, and one of just 19 nationwide. At its heart, this model is about bringing together a wide range of professionals who will support parents to become better equipped to meet the demands of parenting and being able

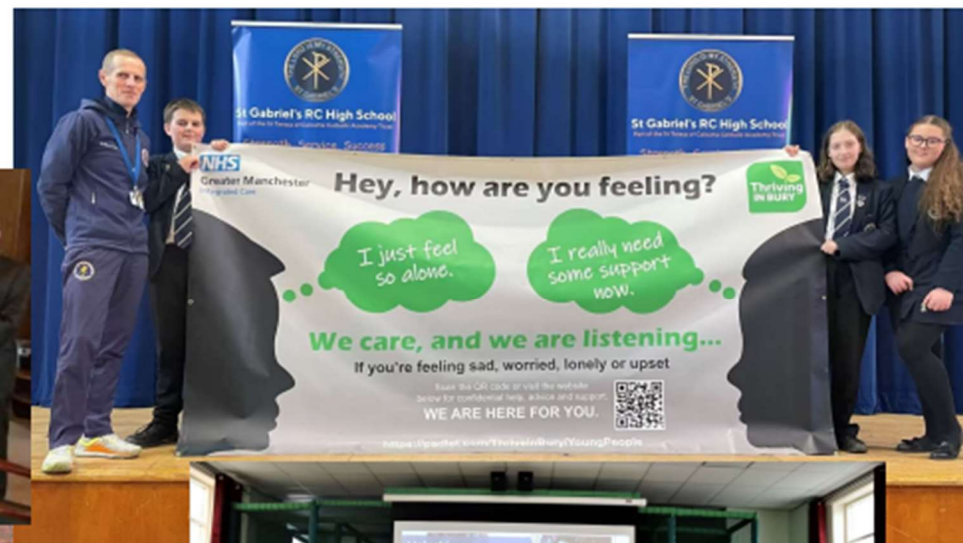
to use high-quality centre like the East Bury Family Hub will provide a key resource for parents and practitioners, whilst allowing the community to come together to support each other.

- New Mental Health Resources for Children and Young People:** Listening to our children and young people it is clear that many are struggling with their mental health and wellbeing post Covid-19. This has been one of the top issues identified by our Youth Cabinet and through our Childrens Voice Projects. In March 2023 NHS GM and Bury Council worked with our young people to launch Thriving in Bury, a new mental health campaign based on the creation of a children and young people's mental health service directory. The directory has been developed with children and young people to help them find the best ways to support their emotional health and wellbeing. The digital platform has a noticeboard format, which was designed based on feedback from young people. It provides useful information and resources about local services, youth groups, emotional concerns and issues, national helplines and digital support. As part of our Public Sector Reform work our schools, colleges and wider support services have wrapped around this service with the aim of providing early help to reduce the number of referral through to specialist care and support meaning children get support sooner and in a format that they are comfortable with.
- Delivering Inclusive Growth:** Getting regeneration schemes right in the eyes of the general public is always a challenge. As part of the LET'S Do It vision of achieving inclusive economic growth, we are committed to ensuring residents have a voice in plans to change (and hopefully improve) their neighbourhoods. In Radcliffe, the first of our Levelling-Up projects to break ground, we used community connectors to get the conversations started, as well as hosting a regen office in the centre of the development. Every element of the scheme is co-designed, including the site hoardings. Our early conversations with residents about regenerating Prestwich Village received nearly 900 responses, leading to more community-led conversations taking place in October and November. For our redesign of the Millgate Shopping Centre in Bury Town Centre, a series of roadshows have been undertaken to inform the development of the Masterplan, including with visitors to our "World Famous" Bury Market. Meanwhile in another of our neighbourhoods, Whitefield, we have been successful in being accepted on the Government's High Streets Task Force Programme. Where possible, the short and medium term proposals will be led or delivered in partnership with the community.

As a Council we are incredible proud of our award winning voluntary sector. In 2022 five local organisations won the Queen's Award for Voluntary Service were given a mayoral reception at Bury Town Hall. Equivalent to an MBE, QAVS are the highest awards given to local voluntary groups in the UK, and they are awarded for life. Corrie Gardeners, Greater Manchester Army Cadet Force (Hawkshaw), The Attic Project, Bury2gether and Rammy Men have also won the award. At the event our Cabinet Member for Communities acknowledged: "Every day of the week, organisations like these are supporting people at neighbourhood level. A recent survey estimates that there are more than 26,000 people in our borough who volunteer a total of 130,000 hours per week, and they deserve all our thanks."



## LET'S in action ... Community-Led – Building On Strengths



**Bury**  
Council



## 2.4 Equality and Diversity

In 2021 Bury Council and NHS GM (Bury) published a new Equality Strategy that built on the commitments within LET'S Do It! and incorporated actions from an independent review of our approach to equality and diversity practices. As part of this, a new Inclusion Strategy was co-produced with staff groups, community leaders and senior champions to deliver our commitment as below:

*The inclusion vision for Bury 2030 is to enable every person in the Borough to fully participate in and shape the collective, by supporting people to be themselves; to speak out about ideas and concerns and to be heard.*

Building a workforce which is representative of the people it serves is a core focus of our shared inclusion commitment. This commitment relates to all nine of the protected characteristics in law as well as four additional groups which have been formally recognised by the Council and are reflected in our external as well as internal work i.e. included in our Equality Impact Assessments. These groups are: Carers; Our looked after children and care leavers; Military veterans and the socio-economically vulnerable.

The population profiles of the neighbourhoods in our borough are distinct and we celebrate the diversity that brings. In the south of the borough we are home to the largest Jewish population outside London, with significant tri-borough work being undertaken between Bury, Manchester and Salford to understand the needs of this community and its constituent groups. Around Bury Town centre we have a large Asian/Asian British population and also Black/Black British residents. We have also seen new communities settling and have strong connections with Poland and Ukraine. Whilst this diversity is a strength for us, community cohesion is something which continues to require attention and focus, especially when international issues have implications for our local communities.

We have an aging population, particularly in the North of the borough with around of a fifth of our residents declaring themselves to have a disability in the Census 2021. Addressing health inequalities was already a key commitment within the LET'S Strategy but we know that Covid-19 has exacerbated the problem with more people now presenting with complex, long-term conditions requiring more support from our primary care and community services.

Since the launch of our new Inclusion Strategy we have considerably stepped up the activity of our Inclusion Working Group and associated staff groups, including broadening membership to include other public sector partners. • We now have a monthly internal Inclusion Matters communication and an annual internal and external communications and engagement plan shaped jointly with the Cohesion subgroup of the CSP which is informed by our demographics and community priorities. Together we have delivered a series of workshops focused on the different protected characteristics and celebrating the diversity of the borough. Our Employment Equality Report (2023) can be found here:

<https://www.bury.gov.uk/asset-library/employment-equality-report-2023.pdf>

The 2023 report highlighted that in order to improve the accuracy and meaningfulness of our reporting we need to focus on data collection and data quality. Currently 30% of disability, 25% for race and 77% for gender identity are unknown which weakens our ability to benchmark our data, identify trends and monitor improvements. On a more positive note:

- The number of applications received from People Experiencing Racial Inequality (PERI) has increased by 8% from last year (28% from 20%).
- Vacancies within the Council are attractive to our Black African community with 7% of applications from this ethnic group compared to a population figure of 1%. However, this group only accounted for 0.6% of those recruited.
- The levels of representation at senior levels (SM1 or above) has seen a positive increase this year in relation to ethnicity.
- Out of the total number of applications received only 7% were from disabled applicants. This is a positive improvement from last year's 5% but is still a sizable under-representation from the borough population. To support this, in 2022 we achieved re-accreditation as a Disability Confident Leader.

Examples of the work delivered by our Inclusion Group, in conjunction with our local communities, to strengthen our approach to inclusion are provided below:

- Bury Pride is always first in the calendar in GM. This year was bigger than ever with more people attending the parade, which took a longer route around the town centre, culminating with a concert hosted in the Town Hall.
- To mark Black History Month this year colleagues were invited to take part in a comms takeover day to tell colleagues about the black people who have inspired or continue to inspire them and the stories they wanted to share.
- Earlier this year, the Council's commitment to serving current and former armed forces members was nationally recognised as we were awarded Employers Recognition Scheme Gold status by the Ministry of Defence. We have a strong Military Covenant Working Group bringing together veterans with Council officers to focus on key topics such as health and wellbeing.
- For the second year running Bury hosted a Mela in Openshaw Park. Despite the weather over a thousand people attended and joined our Mayor and Leader of the Council in a community-led celebration of South Asian heritage.
- Bury Council has provided a range of help available for individuals and households struggling during the current tough times and therefore socio-economically vulnerable. Working with Bury Voluntary, Community and Faith Alliance (Bury VCFA) the Council has also launched a new Cost of Living Community Fund to support community and voluntary groups who are helping vulnerable households.

Bury has received funding from NHS GM as the lead organisation for a two year project focused on developing a more inclusive public service workforce. This project includes four GM boroughs in a cross-organisational mutual mentoring programme and work to strengthen the way organisations attract staff informed directly by community engagement. In addition, Bury is leading wider work across GM to strengthen workforce inclusion which is just commencing and has received around a £0.4M financial commitment from the GMCA to support.

## LET'S ... Celebrate Strengths



**Bury**  
Council



### 3 Organisational and Place Leadership

Much has changed since the last LGA Peer Challenge. A new Chief Executive has brought renewed energy and enthusiasm for partnership working and the refreshed the governance surrounding Team Bury, our strategic cross sector partnership, to provide increased purpose and focus.

Previously meeting on an ad-hoc basis, over the last twelve months Team Bury has been gathering quarterly to work through progress updates from the organisation or partnership leading each of the seven priorities. This has been symbolic in terms of the distributed leadership that the previous Peer Review suggested and has lessened the reliance on the Council for facilitation. That said, core attendance at the events has not been consistent and the results from the latest State of the Borough report have highlighted the need for attention to be paid to our shared objectives.

#### **Let's do it in 2022!! Team Bury Refresh**



Monthly Partnership Meetings (referred to as the Delivery Coordination Group) have proved useful in term of coordinating the quarterly events however there is a need to revisit these arrangements in order to provide more oversight on the work of the partnerships to deliver the LET'S Vision. The DCG will now consist of the leads for each of the boards set out below, chaired by the Leader of the Council.

Team Bury Governance	Strategic Priorities
Bury Business Leadership Group	<ul style="list-style-type: none"> <li>- Economic Growth</li> <li>- Business Start-Ups and Sustainability</li> <li>- Skills and Employment</li> <li>- Inward Investment</li> <li>- Town Centre Regeneration</li> <li>- Atom Valley and Northern Gateway</li> </ul>
Climate Change Board	<ul style="list-style-type: none"> <li>- Energy Supply</li> <li>- Homes, Workplaces &amp; Public Buildings</li> </ul>

	<ul style="list-style-type: none"> <li>- Travel</li> <li>- Consumption &amp; Waste</li> <li>- Food</li> <li>- Natural Environment</li> <li>- Green Economy, Skills &amp; Education</li> <li>- Environmental Justice</li> <li>- Climate Resilience &amp; Adaptation</li> </ul>
Community Safety Partnership	<ul style="list-style-type: none"> <li>- Reducing drug related offending</li> <li>- Supporting victims and tackling the cause of domestic abuse</li> <li>- Strengthening community cohesion</li> <li>- Creating and maintaining safe spaces</li> <li>- Tackling crime and anti-social behaviour</li> <li>- Reducing reoffending</li> </ul>
Children's Strategic Partnership Board	<ul style="list-style-type: none"> <li>- Safe childhoods, protected from harm</li> <li>- Good education, outcomes and skills</li> <li>- Happy, healthy lives</li> <li>- Growing up confident and resilient</li> <li>- Active citizens</li> </ul>
Health & Wellbeing Board	<ul style="list-style-type: none"> <li>- Starting Well</li> <li>- Living Well</li> <li>- Living Well with a Long-Term Condition or as a Carer</li> <li>- Ageing Well</li> <li>- Healthy Places</li> <li>- Inclusion</li> </ul>
Locality Board	<ul style="list-style-type: none"> <li>- Urgent Care</li> <li>- Elective Care and Cancer</li> <li>- Mental Health Transformation</li> <li>- Adult Social Care</li> <li>- Learning Disabilities and Autism</li> <li>- Complex Care</li> <li>- Diabetes</li> <li>- Neighbourhood Health and Care</li> <li>- Community Health Services</li> <li>- Primary Care</li> <li>- Palliative and End of Life Care</li> </ul>
Voluntary & Community Sector Chief Officers Group	<ul style="list-style-type: none"> <li>- Leadership and Advocacy</li> <li>- Partnerships and Collaborations</li> <li>- Capacity Building</li> <li>- Volunteering</li> </ul>

Across the Partnership there remains a strong commitment to ensuring that the borough reduces health inequalities and delivers inclusive economic growth however it is clear we are not working effectively as a partnership to be more than the sum of our parts. The first two annual partnership performance reports, the State of the Borough, have highlighted the impact of the pandemic and subsequent economic crisis on our progress. The LET'S vision was deliberately ambitious however the challenge has become even greater since the launch of the strategy and our partnership approach needs to step up accordingly.

1		Baseline: 2015 - 2019	Males 16.7 yrs Females: 11.7 yrs	2016 - 2020	Males 12.3 yrs Females: 10.4yrs	↓	The gap between areas has been reduced but this is due overall to a decline in the best performing areas.	This is the most recent data available			
2		Baseline: 2019	All pupils 71.4% FSM Pupils 59.8% GAP 11.6%	2022	All pupils 63.3% FSM Pupils 50.0% GAP 13.3%	↑	The gap has increased and performance for both groups has got worse	2023 provisional	All pupils 65.7% FSM Pupils 48.5% GAP 17.2%	↑	Inequalities have increased where performance has declined for our FSM pupils and increased for all pupils compared to the baseline.
3		Baseline: 2019	All pupils 43.5% FSM Pupils 34.9% GAP 8.6%	2021	All pupils 49.4% FSM Pupils 37.9% GAP 11.5%	↑	The gap has increased but performance for both groups has improved. Caution has to be taken using this data as a comparison to previous years as based on teacher assessed grades due to exams not taking place during COVID	2022	All pupils 46.3% FSM Pupils 37.8% GAP 8.5%	↓	The gap between the FSM and overall cohort has become slightly smaller following an increase during COVID. There has been improvements for both cohorts in terms of attainment achievement compared to the baseline.
4		Baseline: 2019	NVQ3+ 57.9% No quals 9.1% GAP 48.8%	2020	NVQ3+ 61.7% No quals 4.5% GAP 57.2%	↑	An increase in residents with NVQ3+ qualifications and a reduction of those with no qualifications so performance has improved.	2021	NVQ3+ 61.9% No quals 6.5% GAP 55.4%	↓	A small increase in residents with NVQ3+ qualifications – 0.2% however also an increase in residents with no qualifications.
5		Baseline: 2019	Median hourly earnings for residents £13.80	2020	Median hourly earnings for residents £14.73	↑		2022	Median hourly earnings for residents £14.55	↓	
6		Baseline: 2018	4.6 co2 tonnes per capita	2020	3.8	↓	Likely the impact of COVID with reduced footfall which has made a significant reduction on the tonnes per capita.	2021	4.2	↑	Levelling out the significant reduction post COVID, still a reduction trend from baseline however no longer top 5 per km2 in GM, now ranking 6 <sup>th</sup> .
7		Baseline: 2019	2.7 % of premises unable to access good download speeds	2020	2.1 % of premises unable to access good download speeds	↓		2021	1.2 % of premises unable to access good download speeds	↓	

## 4 Governance and Culture

Since the last Corporate Peer Challenge, our constitution and decision making processes have both been reviewed and updated. In part prompted by the change in partnership arrangements within the NHS, and also in response to a Chief Officer Restructure undertaken by the new Chief Executive, a much tighter Executive Team has been formed with accompanying scheme of delegations.

We have strengthened our Senior Leadership Group where the Executive and their direct reports meet on a monthly basis to discuss key issues and monitor the delivery of the Corporate Plan through a rotating agenda which focuses on Workforce, Budget, Performance. This is also where shared “wicked issues” are discussed and owned.

Beneath this is a much larger Senior Management Forum consisting of staff who report directly into SLG. This group meets quarterly and has been used as a key information sharing group, but also as an opportunity to deliver consistent messaging and training around corporate activities such as our new Procurement Regulations, the importance of Risk Management and improving report writing standards for our committees. We also discuss key leadership themes such as inclusion health and safety and our commitment to corporate parenting.

With regards to member arrangements, work has been undertaken to clarify the values and behaviours expected in a member-led organisation, including the establishment of a Members Development Group. Updating the scheme of delegation has allowed for greater understanding on the use of Key and Non-Key Decisions, with standard agendas for Portfolio Meetings now capturing actions and Operational Decisions in a more structured way. The dynamic of the Council's democratic leadership has changed over the last four local elections with the introduction of Radcliffe First, a new political party formed on the basis of geography and local priorities, to the Council Chamber. Eight of the nine available seats in Radcliffe are now occupied by Radcliffe First Councillors.

Responding to Member's Casework has been focus for attention within the Council for last 12 months due to a lapse in adherence to agreed response times and concerns about the quality of information being shared with our ward councillors. Partly through improvements in the casework system but mainly through increased managerial oversight, the response times have improved with the exception of particularly flash points such as floods or storm damage. Further work is required to help automate this process and ensure consistent, high quality responses but this work has provided a useful reset in member/officer relationships.

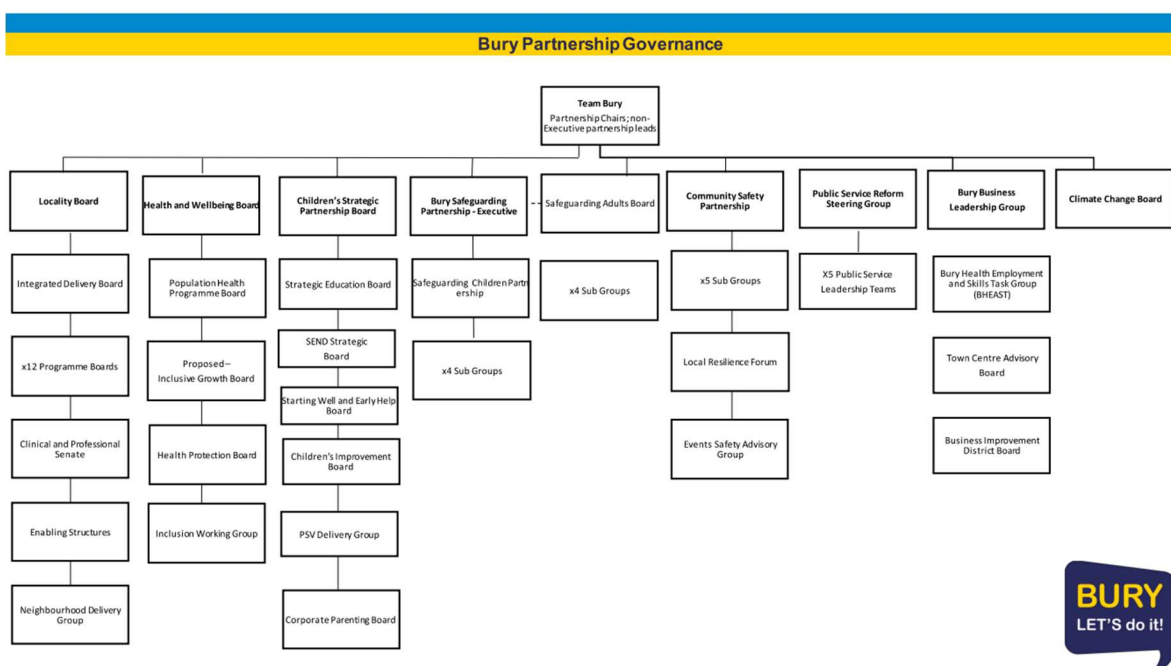
In terms of compliance within the Council, following an informal review by the Information Commissioners Office, participation in mandatory training on Data Protection and Information Security has improved significantly, as have our processes to ensure timely responses to the FOIs and SARs. By contrast our process for tracking and relying to complaints requires more work and is currently subject to a policy review and staff consultation. Following a number of public reports from the Local Government Ombudsman, being able to show progress in this area is a corporate priority, especially in advance of the responsibility for our housing stock

returning to the Council with the additional regulatory pressures that goes with them.

Scrutiny of the Council's performance is proving valuable when dealing with potentially contentious and complex issues. One of the most high-profile decisions tracking through our governance at the moment is Places for Everyone, the long-term plan for nine Greater Manchester districts to agree a strategic policy framework to meet their local housing and employment needs. Approving this policy is a good example of the complexity of working within a devolved authority and meeting the demand for appropriate scrutiny from regional to ward level. Examples of working differently to develop stronger practice include:

- The creation of Task & Finish Groups to support the work of the Children and Young People Scrutiny Committee, particularly in relation to preparing for the new Ofsted Inspection Framework for Specific Educational Needs.
- The use of a Performance and Finance Subgroup reporting into Overview and Scrutiny to allow more through exploration of budget and workforce issues.
- A programme of deep dives requested by Internal Audit based on a RAG rating of the Risk Register. These are attended by the appropriate Executive Director to ensure accountability and action.
- Support from partners in attending Overview and Scrutiny to demonstrate shared commitment to key products such as the Community Safety Strategy and the Anti-Poverty Action Plan.

As outlined above, although work has been undertaken to review the Team Bury Partnership governance structures there remains more to do. For a relatively small authority we have a large and complex committee structure and would welcome feedback on what future steps could be taken to simplify and streamline our approach, especially given the demand on time of politicians, officers and partners.





## 5 Financial Planning and Management

Along with many other local authorities Bury Council is faced with an incredibly challenging financial planning environment. Our latest position is outlined in the Quarter Two Report presented to Cabinet on the 7<sup>th</sup> November 2023:

<https://councildecisions.bury.gov.uk/documents/s37648/Quarter%20%20Budget%20Monitoring%20Report.pdf>

Analysis of data within a recent report from the Institute of Fiscal Studies has highlighted that Bury Council is in the bottom 20% worst-funded councils, ranking 122 out of 150 upper-tier English local authorities in terms of money to spend per resident. This, combined with calculations which show that the Council's annual real term core spending power has been reduced by 29% since 2010/11 provides the context for the difficult decisions that need to be taken in agreeing our next budget.

As at the end of Quarter Two, the Council faces a current revenue forecast overspend of £9.749m. This is a much improved position from that which was reported at Quarter One when the forecast overspend at the end of the year was projected to be £13.266m. This improvement is as a result of spending controls introduced at the end of June which have seen the whole organisation work collectively to review discretionary spend and take shared ownership of the budget challenge. Despite these improvements, the Council's reserve position means that wherever possible these overspends need to be mitigated in year. This creates additional pressures on departments already committed to delivering over £30m savings.

To support this work the Council has taken further action through the voluntary introduction of a Financial Improvement Panel in order to bring additional expertise and challenge into the Council from Cipfa, the LGA and peers from other councils. This ensures that decisions are being taken based on best practice and current analysis of the sector's broader financial situation.

Ultimately the sustainable financial model for the Council relies on the achievement of the LET'S vision which sets out a roadmap for the reduction of demand on public sector services and increased community capacity. Therefore, the Council is looking at how to make the short-term decisions required to balance budgets in year within the longer-term vision of community wealth building and delivering inclusive economic growth.

The Council has invested time and resource in understanding our demand and savings proposals relate to opportunities for transformation in high spend areas such as social care for children and adults, whilst recognising the requirements of working within a regulatory environment and the Council's current Inadequate Ofsted rating for Children's Services. In addition, we are prioritising other activity such as estates rationalisation, investing in more energy efficient operations and ensuring we maximise income where appropriate from fees, charges and other income sources.

With regards to other aspects of financial planning, the capital programme has been updated to re-phase schemes into future years. This has resulted in a reduction in the overall 2023/24 Capital Programme by £67.035m, from £144.588m to £77.553m and the savings in the revenue have been reflected in the revenue outturn position. Further reviews of the capital programme are being undertaken. A full suite of Financial Management Reports including the HRA Business Plan, Reserves Strategy, Treasury Management Plan and a new Medium Term Financial Strategy.

In the meantime, at Full Council in September a resolution was passed that the Council should:

- Launch a public campaign calling on the Government to fix the broken system of local government finance and give Bury what it needs and deserves.
- Highlight as part of this campaign what the Council and residents can do to support reducing costs and demands on local services.
- Write to our Members of Parliament, requesting they support our campaign and lobby Ministers for a fair deal for Bury.

This resolution has led to the development of our LET'S Fix It ... Together campaign, which calls for the national Fair Funding Review to undertaken as quickly as possible in order to acknowledge the unprecedented demands on local authorities budgets such as inflation, increased social care costs and the need to support vulnerable residents with the cost-of-living crisis. This campaign has been timed in conjunction with the Local Government Association's input into the Autumn Statement process. In particular, our asks for Bury include that the Government considers:

- Longer-term funding settlements to allow for confidence and surety in planning.
- Fund the roll-out of well-evidenced interventions to reduce demand for children's social care placements and retain and expand placement capacity.
- Provide additional funding to meet the year-on-year increase in demand for Education, Health and Care Plans.
- Provide a guarantee that all council Dedicated Schools Grant deficits will be written off.
- Provide substantial new investment to help tackle unmet and under-met need through an expansion of provision, including preventative services, and in new models of care, including housing, and funding for the voluntary and community sector.
- Development funding to support the use of brownfield sites for regeneration and housing.
- Pursue national distribution of asylum seekers.

This campaign is twofold. Whilst asking for fair funding, it also promotes all of the work the Council and our communities are doing to come together to protect services for those who need them and use of collective strengths to help people to help themselves. As stated above this is what our LET'S vision is all about.

## 6 Capacity for Improvement

The LET'S Do It! Strategy sets the commitment of Bury Council and its partners to improving public services within reducing resources, by working together on a place-based approach, with a focus on prevention, partnership working and communities. Within the Council, this commitment is being realised through the delivery of our Corporate Plan and its constituent parts, one of which is our Transformation Strategy.

Bury Council's Transformation Strategy was established in 2021/22 to deliver:

- Improved ways of working to facilitate the Council's contribution to the delivery of the borough's strategy, LET'S Do It! and the Council's Corporate Plan
- Savings of £4.937m by 2023/24 to support the delivery of the Council's Medium Term Financial Strategy.

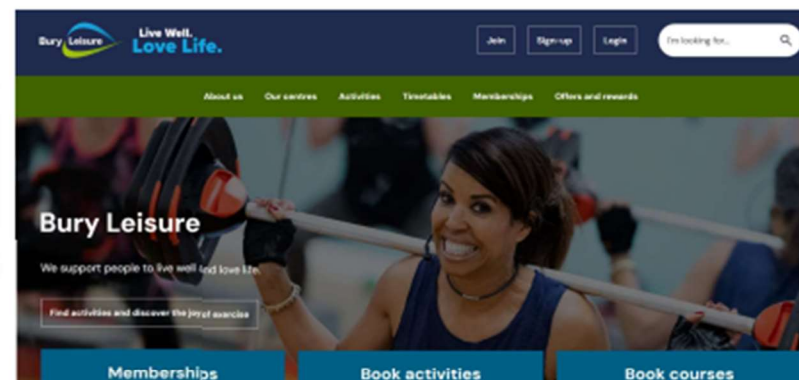
Achieving these objectives has been delivered through three programmes of work: LET'S Do It! ... Once, Well and Flexibly. In parallel a new digital strategy has been developed to enable transformation through:

- Promotion of a digital first approach to engagement
- Providing a high-quality digital workplace to underpin agile working
- Creating improved access to business intelligence
- Supporting collaboration between colleagues, partners and wider stakeholders

Whilst a number of these programmes are still in delivery, the Transformation Programme has set the tone for continuous improvement across the Council. Resourcing this is a challenge whilst also delivering business as usual and therefore the Corporate Plan has been used as a way of mainstreaming improvement projects as corporate priorities, rather than being a standalone projects.

The legacy of the work so far is being used to further improve Council services. For example, the LET'S Do It ... Well! programme invested in our HR System, itrent, allowing more self-service options for our managers and employees, reducing demand on business admin staff. There is further work that can be done here, and we continue to roll out improvements. Likewise LET'S Do It ... Once! has seen the introduction of a new website for the Council which provides a more modern platform and user friendly templates to put more of our services online. The ability to modernise our online presence is now being taken forward by other services such as Leisure and Registrars.

We continue to look beyond the council to our peers and colleagues in the wider public sector for best practice and support on making improvements to our ways of working. We required we have sought advice from external specialists, particularly within areas of high demand such as Childrens. We are open to new ideas and frequently invite organisations such as the LGA to visit, challenge our thinking and particularly provide inspiration as to how we can find capacity for ongoing improvements.



- 2,376 new registrations in 3 months
- 85% bookings made online (up from 27%)
- 65% less phone calls
- 500+ extra memberships

**LET'S ... Transform**

**Bury**  
Council



## 7 Sharing Successful Practice



## 8 Conclusions

We hope you have found this a useful summary of the Council progress since the last Corporate Peer Challenge and the range of activities that we are currently undertaking to strengthen our corporate approach to organisational delivery and place leadership. As we said in the introduction, Bury is a brilliant and beautiful borough which we are very proud of, but it is also a busy one, with much to do to achieve our ambitions for 2030.

We are committed to all sharing in the success of our 2030 vision but recognise we need to do more as a Council and Partnership to make that a reality. We need to guard against trying to do too much in order to stay focused on the things that will make a real difference. We must then mobilise appropriately to support the delivery of those activities through our statutory and local partnership structure.

We have previously used the descriptor of “Being our Bury Best Selves” and this is more important than ever when faced with challenging budget options and increasing demands on services. We must stay true to values and behaviours committed to within our LET’S Strategy to put our communities first and reform our public services in to a more sustainable and supportive delivery model.

We welcome this Corporate Peer Challenge as an opportunity to take stock of our progress to date, to listen to external views on what we have achieved, and to emerge refreshed with a new set of recommendations to support us with achieving our ambitions.

So, to once again use the words of one of our most famous daughters ...

***LET’S Do It!***

# LGA Corporate Peer Challenge

Bury Council

28<sup>th</sup> November – 1<sup>st</sup> December 2023

Feedback report



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## 1. Executive summary

The borough of Bury as a place, is changing.

Such changes include the regeneration of Prestwich, Radcliffe and Bury Town Centre. In actively leading this, the council has a clear vision that by 2030, the borough will *'stand out as a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation'*.

In progressing this, the council has prioritised inclusive growth and reducing inequality. The council's focus on this is well recognised by those inside and outside the council. An ambitious programme is in place, which is backed by significant funding for schemes. This presents a wave of change which is attracting further interest, leading to many other opportunities to deliver on inclusive growth in the borough.

Partners can see that the council has really stepped-up in its leadership role in regards to inclusive growth and reducing inequalities in the last few years. For example, the council is recognised for the way in which it is working closely with partners in Greater Manchester on the Atom Valley and Northern Gateway projects.

Given the scale of change happening across the borough, it is important to ensure that the council has the capacity and resources in place to deliver on these place based plans and to capitalise on the right opportunities being presented for the borough. Beginning the work to prepare a new Local Plan, which complements the emerging GM Places for Everyone Plan, will help the borough to develop in a sustainable way, supporting the council's place-based leadership role too.

The peer team heard how the Leader and Chief Executive are both highly regarded - including locally across Bury, with authorities across Greater Manchester and at the Integrated Care Board (ICB). The council has continued to prioritise strong strategic positioning with health, at both a Bury and Greater Manchester level and the levels of performance observed in adult social care, health and public health are generally positive.

The peer team heard of the strong examples of teams working together at a neighbourhood level, using a model which is seen as “innovative and brave”. This has been developed over time in a collaborative way, which is a characteristic partners often credit the council with.

The mantra of “Let’s do it...” is a motivating call to arms, which is well recognised by all of those the team spoke with. The recent ‘Let’s Do It Challenge’ is an excellent model used to immerse around 1,200 members, officers and partners into this and why it matters for Bury. ‘LET’S’ is also used to spell out the characteristics of how the council wishes to operate in future – Locally, Enterprising, Together and Strengths-based.

The council has made progress in regards to equality and inclusion since the last Corporate Peer Challenge. Those the team spoke with recognise the need to keep going with this, and the need for progress to continue. The senior leadership of the council are very much recognised as helping to mobilise this change.

It is clear from all of the above that the council has many strengths. A hard working, dedicated cohort of officers, with a strong work ethic being key to these strengths. The peer team heard this a number of times during the week and could see how “People here care very deeply”.

It is with this in mind, that it is now an opportunity to refresh the borough strategy to re-tell the story behind this vision for the borough, based on the new and growing strengths that now exist locally. Doing this can help to gather further momentum around where Bury is going, to galvanise efforts and help capitalise on the opportunities that exist. Doing so can help to further develop the collective understanding of that strategy and help bring teams within the council, closer together in delivering it.

Sharpening up the council’s own corporate priorities is an important step too as many people at the council report being particularly stretched. Defining and sticking to a clear and limited set of priorities for the council can help to deliver across the short, medium and longer term. Using a sharpened set of corporate priorities to help shape the approach to decision making and governance as well as the roles of teams and

resource allocation can also help to support capacity and give more space for service delivery.

Collective ownership and accountability will be crucially important as the council moves forward in addressing its priorities. Given the challenges the council is managing across finance, children's social care and SEND for example, it is not possible to make sustained, continuous improvement without strong, collective, day-to-day working. Establishing a 'One Council' culture and ways of working which break down any siloed approaches and suitably aligns the use of skills, time and resource to the council's long-term priorities is important in this regard.

The council sought this Corporate Peer Challenge to provide external feedback about the council's challenging financial position and the plans to bring about improvement in particular. The peer team observed how the council's finances are in an extremely challenging position. It is crucial that the council is able to establish one clear picture of the corporate finance position and communicate that picture consistently both internally and externally. Ensuring everyone understands this and what it means is essential for developing the collective ownership required. This report details steps the council will be required to take around improving the quality of financial reporting, as well as the development and delivery of budget options which avoids a continuing reliance on one-off reserves.

To help deliver this, the council are also recommended to shape a new corporate transformation approach to deliver on the new Medium Term Financial Plan (MTFP). This will involve establishing a corporate transformation plan, approach, resource and culture. This will require supporting and developing the key enabling functions – including finance, human resources and information technology.

The council appointed a new interim chief finance officer in the month leading into the peer challenge. This is seen as a strong appointment and an opportunity for the council to capitalise on. The council should move quickly to appoint permanent financial leadership to work with the interim CFO, for as much of the remainder of this twelve month period in which the interim postholder is in post. This will help the council to make the improvements required, to support the finance team and its development as well as continue improvement into the medium term.

Since 2003, the responsibility for the day-to-day running of the council's housing stock has sat with Six Town Housing, an arm's length management organisation (ALMO). Earlier this year, the council took the decision to bring this back 'in-house', following an options appraisal carried out independently. This presents opportunities to improve the offer to local tenants, as well as support local communities more widely. A transition of this nature is a significant undertaking with a number of risks to consider and carefully manage. It is important that the council develops a deep, collective understanding and plan for the risks and opportunities around Six Town Housing. Those risks and their mitigations, through the use of the Corporate Risk Register, should support collective understanding and oversight.

The council's children's social care service received an OFSTED ILACS inspection in October 2021 which gave an 'Inadequate' judgement. At the time of this peer challenge, the council had received four published monitoring visits from OFSTED since this ILACS inspection which had shown some steady progress. The council has however vacancies within the children's leadership structure which it is crucial to address in order to build on the early progress seen. This includes appointing to the permanent assistant director posts which were vacant at the time of this peer challenge. Once made, these senior appointments will be an important part of improving corporate engagement from the team leading services for children and young people. This should include developing a shared council narrative on the performance and plans. And provide a strong anchor point for the suggested improvement in corporate support across finance, HR and information technology to enable the required progress in services for children and young people.

To support the political leadership in addressing all of the above, the council would benefit from providing further support and development to the Cabinet. This includes ensuring Cabinet members have all of the practical tools to do the job, the support and space to develop their portfolio and policy positions and ongoing development for all members.

To conclude, Bury as a place is changing. Capturing this sense of change and building the story of this change from the strengths and assets available now, can help to focus and galvanise efforts. This includes dealing with the challenges the council faces in children's services and finance in the short term, whilst working

towards the medium term position the council seeks. The recommendations detailed in this report can help the council to do this. So without further ado, “Let’s do it”...

## 1. Key recommendations

There are a number of observations and suggestions within the main section of the report. The following are the peer team’s key recommendations to the council:

- 1. Refresh your 2030 strategy, using this to tell the story as a positive vision, based on the strengths and assets that now exist locally.**
- 2. Sharpen up the priorities for the council and use them to shape decision making processes and resource allocation consistently.**
- 3. Establish a ‘One Council’ culture and ways of working to better position the council in dealing with its challenges and achieving its priorities across the short, medium and longer term.**
- 4. Develop a single, clear and robust MTFP for the council. Ensure everyone understands this and what it means.**
- 5. Establish a corporate transformation plan, approach, resource and culture to support delivery of your MTFP.**
- 6. Further develop finance, HR and IT – including their role and the relationships they require.** These services are key to enabling the delivery of the council’s transformation needs.
- 7. Work with the finance team to further develop a capable team into a, stable and supported finance function – including moving quickly to appoint permanent leadership to work with the interim CFO.**

8. **Build the resilience of the Children's Leadership Team – including appointing to the vacant senior officer posts.**
9. **Take steps to help further support and develop the Cabinet team, using the examples given in this report.**
10. **Ensure the council's inclusive growth ambitions are suitably resourced to see them realised.**
11. **Start to prepare a new Local Plan to complement the Greater Manchester Places for Everyone Plan.**
12. **Plan for the risks and opportunities around Six Town Housing in realising the changes the council seeks from this move.**
13. **Support the further development of risk and audit within the council.** This includes the use of the Corporate Risk Register, the role of Internal Audit and the development of the Audit Committee – building on the points raised in this report.

## 2. Summary of the peer challenge approach

### 3.1 The peer team

Peer challenges are delivered by experienced elected member and officer peers. The make-up of the peer team reflected the focus of the peer challenge and peers were selected on the basis of their relevant expertise. The peers were:

- **Lead Peer – Paul Hanson** (Chief Executive – North Tyneside Council).
- **Lead Member Peer – Cllr Peter Marland** (Leader – Milton Keynes Council).
- **Cllr Rob Waltham MBE** (Leader – North Lincolnshire Council).
- **Garry Cummings** (Deputy Chief Executive and Director of Finance,

Transformation & Performance - Stockton on Tees Borough Council)

- **Claire Taylor** (Chief Operating Officer – Sheffield City Council)
- **Karen Bradshaw** (LGA Associate and former Executive Director of Children’s Services – Shropshire Council).
- Peer Challenge Manager – **Dan Archer** (LGA)

### 3.2 Scope and focus

The peer team considered the following five themes which form the core components of all Corporate Peer Challenges. These areas are critical to councils’ performance and improvement.

1. **Local priorities and outcomes** - Are the council’s priorities clear and informed by the local context? Is the council delivering effectively on its priorities?
2. **Organisational and place leadership** - Does the council provide effective local leadership? Are there good relationships with partner organisations and local communities?
3. **Governance and culture** - Are there clear and robust governance arrangements? Is there a culture of challenge and scrutiny?
4. **Financial planning and management** - Does the council have a grip on its current financial position? Does the council have a strategy and a plan to address its financial challenges?
5. **Capacity for improvement** - Is the organisation able to support delivery of local priorities? Does the council have the capacity to improve?

In commissioning this peer challenge, the council asked the peer team to provide specific feedback on its financial standing and approach to financial improvement.

### 3.3 The peer challenge process

Peer challenges are improvement focused; it is important to stress that this was not



an inspection. The process is not designed to provide an in-depth or technical assessment of plans and proposals. The peer team used their experience and knowledge of local government to reflect on the information presented to them by people they met, things they saw and material that they read.

The peer team prepared by reviewing a range of documents and information in order to ensure they were familiar with the council and the challenges it is facing. The team then spent four days onsite in Bury, during which they:

- Gathered information and views from more than 60 meetings, in addition to further research and reading.
- Spoke to more than 150 people including a range of council staff together with members and external stakeholders.

This report provides a summary of the peer team's findings. In presenting feedback, they have done so as fellow local government officers and members.

### 3. Feedback

#### 4.1 Local priorities and outcomes

The 'Let's Do It Challenge' took place in Bury between June and August 2023, involving over 1,200 staff, elected members and partners in an immersive organisational development activity, aimed at helping people to better understand the purpose behind the borough strategy and the 'LET'S' approach. The peer team heard consistently from those who had taken part how impactful, creative, playful and emotive this approach had been – staff in particular commenting on how the *"LET'S do it challenge was brilliant for helping us to understand what this all means"*.

The 'Let's Do It Challenge' has helped to connect people to the 'Let's Do It!' call to arms and created a buzz about this locally. This is an example of how the council is seen to have *"moved on a lot from old fashioned approaches to a culture focused on serving residents"*. 'Let's Do It' resonates with people as a motivating statement which is applied in different ways. The 'LET'S' aspect then forms an acronym which



spells out the principles of public service delivery that the council wishes to prioritise consistently across the borough. They include:

- *Local* – an example of which includes the neighbourhood delivery model.
- *Enterprise* – emphasising ambition, as seen in the council's inclusive growth and regeneration work including two successful levelling up bids.
- *Together* – continuing to actively prioritise close partnership working, for example in health and social care.
- *Strengths* – applying a strengths based model overall, including the assets available in the borough – for example the renowned Bury Market.

'Let's Do It!' and LET'S show their strengths most specifically when describing 'how' people are asked to work, think and design their approaches.

The vision for Bury spells out the 'what' elected members, as local place leaders want for Bury – *to 'stand out as a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation'*. There is a clear desire to achieve this through inclusive growth. A strong understanding of what this means with partners in regeneration is evident with good examples of delivery. People and partners can see this change happening, as reflected by the investments that others are making into Bury. One example of this is Watson Homes moving their Head Office to Radcliffe.

This is however just one example of what are a strong set of component projects now in place in Bury which are creating opportunities to make real transformational change for the place, in-line with the vision of elected members. There is significant resource already in place to support these projects, including the two successful levelling up bids. In-line with efforts to ensure that this growth is inclusive growth, the council has prioritised strong resident engagement as an important aspect of this regeneration work – examples of which include engagement 'roadshows' around the Mill Gate Masterplan, the use of Community Connectors in Radcliffe to start discussions about the regeneration work including the co-design of different scheme aspects. Early conversations with residents about the regeneration of Prestwich village have received almost 900 responses to date too.

The council remains especially committed to improving the health and care system in Bury and is on a journey of innovative, integrated neighbourhood working. As a place, Bury benefits from communities which cluster into local population sizes where interventions, and an approach like the neighbourhood model, can make a real impact - highlighting why the 'Local' aspect of LET'S is so appropriate for public service in a borough like Bury. Whilst there are similarities in this neighbourhood model to other Greater Manchester councils, Bury is seen to be one of the furthest ahead in advancing this model, showing bravery and ambition in making this progress, which aligns with examples of strong operational performance in adult social care and health. These examples are highlighted later in this report.

All of the above summarises so much opportunity in Bury, and so much the council and partners are doing to make further progress against this vision. People recognise the progress that is being made, but also feel the strain of delivering on a number of fronts, with all of the other demands councils are facing.

In terms of setting organisational priorities, the council does this on an annual basis. To help the council in juggling its demands, the council are encouraged to reflect on the priorities of the council and look to sharpen these up, which can then support the organisation to deliver sustainably. Once this has been done it is important to, wherever possible, avoid anything further being added until the impact on these priorities is fully considered.

A sharpened set of priorities might include addressing the council's financial standing, the prioritisation of inclusive growth to tackle inequalities, improving children's services (both social care and SEND) as well as the opportunities presented for day-to-day services (e.g. in light of the Six Town Housing change). Considering how activity against these priorities can be phased on balance then across the short, medium and longer term would then be important.

To support this, the council should reflect on the Corporate Performance Report and how this can be developed to better support collective ownership through the monitoring of progress, accountability and decision making. This will mean ensuring that the targets and milestones reflect the prioritised phasing of activity and expected progress whilst also suitably embodying the ambition (or 'Enterprise') the council has

in setting out its vision for Bury. Doing so can help to avoid a sense of having to “run at everything with the same energy” and support collective working.

The [most recent published, LGInform performance data at the time of the CPC](#) shows that the council has the lowest percentage of children who become the subject of a child protection plan for a second or subsequent time (2022/23) in the CIPFA nearest neighbour group and has a lower rate of Children Looked After than this CIPFA group average. The council's planning timeliness measures are all at 100% (2023/24 Q2) and the borough continues to see high numbers of new business births when compared to other similar boroughs. The percentage of waste sent for reuse, recycling or composting is high at around 54% (2021/22) with residual waste also low. The council has at present slightly lower numbers of households in temporary accommodation per 1,000 households when compared to the most similar CIPFA authority average (Q1 2023/24).

The council has strong performance generally in regards to adult social care and health. The social care related quality of life score was the highest in the CIPFA nearest neighbour group using latest published data at the time of the peer challenge (2021/22). Adult physical activity levels, smoking prevalence, alcohol admissions, and levels of overweight or obesity amongst adults and reception age children as well as the under 18 conception rate all perform better than the nearest CIPFA neighbour group average.

## 4.2 Organisational and place leadership

Throughout the peer challenge, the team heard how the council has “*stepped-up*” in its place leadership role in recent years, this is across thematic areas but is particularly the case in regards to inclusive growth. The council is recognised within Greater Manchester for the leadership role it has played in progressing Atom Valley and the Northern Gateway, which are significant long-term inclusive growth opportunities for the borough and an opportunity to help ‘level-up’ Greater Manchester. The Leader and Chief Executive of the council have played an integral role in this, this being just one example of where the Leader and Chief Executive are highly recognised for the role they play in Greater Manchester and the contributions

they make. The Leader over a number of years has been seen as a “*significant advantage for Bury*” due to the way in which he operates in Greater Manchester and the credibility he has gained.

The council has proactively invested its time into developing strong relationships with private sector partners in furthering its inclusive growth ambitions, for example the relationship that the council has with the Bury Business Leaders Group and the way in which the council has been successful in driving additional social value out of strategic projects.

There are significant assets within the borough which the council are proactively utilising to further develop the borough in line with the vision for 2030. This includes capitalising on the significant potential of the existing transport infrastructure in the borough and the availability of potential development sites.

All of the above adds up to plans to regenerate and grow Bury which are ambitious and the delivery of these schemes is now being seen. This includes, for example in:

- Radcliffe – where the council is leading the delivery of a new Hub in the heart of Radcliffe town centre which will include leisure facilities and a new library as well as the renovation of the Market Chambers for retail, office and studios, multi-purpose event space as well as improvements to the surrounding town centre public spaces.
- Bury Town Centre - the council is working in a joint venture relationship to redevelop a 15-acre site which incorporates the existing Mill Gate Shopping Centre, after the council purchased the shopping centre in 2022. This includes proposals for around 800 homes, new space for leisure and improvements to both retail space and the public realm. This sits alongside work to transform Bury Market as part of the wider town centre regeneration plan.

The council has a mature relationships with the Integrated Care Partnership which supports a good level of performance across health and care (as demonstrated above). The Chief Executive is the designated place lead for Health and Care across Bury and there are many examples of teams working together at a neighbourhood level. The council is known for having a positive relationship with what is seen as a

strong Voluntary, Community, Faith and Social Enterprise (VCFSE) sector locally, and has looked to harness these relationships to address challenges faced by the borough in creative, innovative and brave ways. An example of this creativity has been the launch of the Climate Action Community Fund, which awarded grants to local community groups in Bury for activity which helps the borough to meet its climate goal of being Carbon neutral by 2038.

These examples highlight where the council has had success in developing collective ownership around an agreed set of priorities. This is something the council can look to further develop internally within the organisation, with clear and relevant accountabilities for the priorities of the organisation more specifically (as detailed in the earlier section). Having sharper priorities in place for the council can help the organisation to align its teams and processes around the outcomes it prioritises.

Refreshing the 2030 strategy for Bury underneath the existing vision can help to further galvanise attention, focus and build further momentum. This means re-telling the story of this vision based on the strengths and opportunities that now exist, since this document was originally written. The context for the borough is now different to when this document was originally written and there is an opportunity to tell this positive, forward-looking story in this context, both in terms of the document itself, but also in how this vision and story is communicated consistently with all stakeholders day-to-day.

The Cabinet team have an essential role in leading the council and borough through this journey, which includes dealing with the challenges faced by the council, whilst leading an ambitious programme for the borough. This role is large, demanding, complex and varied. Providing the Cabinet team with the support they need to develop within this role, will benefit the council and should include:

- Practical tools for Cabinet members in their roles – which might include for example coordinated administrative support, timely information and responses.
- Dedicated support and spaces for the Cabinet to further develop their portfolio and policy positions in light of this complex environment – including the various opportunities, challenges, the different routes and risks that exist.

- Relevant, ongoing member development support to help Cabinet members to grow – which may include access to mentoring, training and networks. This includes member development around the specific portfolios of individual Cabinet members as well as support for members in Cabinet overall – for example ‘finance for non-finance Cabinet members’ training.

On the back of the positive, mature system relationships the council has built-up within Greater Manchester, there is also a welcome opening from the combined authority for the council to ‘lean-in’ with any challenges or asks the council may have more widely, which partners are happy to discuss. The council will find capability and capacity to face its challenging context by ensuring it is fully engaged in the full range of peer and professional networks across Greater Manchester and elsewhere.

### **4.3 Governance and culture**

As detailed earlier in this report, ‘Let’s Do it!’ and the Let’s Do It! Challenge have both had a positive impact on the culture of the council as a motivating call to arms. The LET’S acronym within this outlines a set of positive behaviours for the council and wider partnership, which the council can continue to build its culture from. Work is however required to establish a ‘One Council’ culture – working well consistently as one corporate team, which aligns to the Together element of LET’S, making this an outlook and approach that everyone commits to across the council.

The work to sharpen up the corporate priorities can have a role here too, in that it can be then used to focus governance processes and meetings around the key priorities of the council and support officers to work across this as one team, reducing demands on others in a supportive way, where appropriate. For understandable historic reasons, the council has developed a significant number of corporate management meetings for senior officers and Cabinet Members. A sharpening of priorities should allow the organisation to consider what might be safely eased and who should attend. A simple mapping exercise which then compares the priorities and risks to the meetings and processes in place should then help. There may be examples already where the involvement of the senior officer team can be reduced – examples of which for further consideration, may include the extent of involvement in



the Policy Advisory Boards and the Finance Improvement Panel. The Finance Improvement Panel will require consideration in any case, now that the Chair of this panel has become the council's interim chief finance officer.

The peer team were able to observe how the approach to equality and inclusion at the council has advanced since the last peer challenge. The council has in place a strong and committed working group who are an asset in this regard, providing many ideas and healthy challenge to the council. The group feel listened to and are able to give examples of change happening over time. Senior leaders at the council are seen to be supporting this movement, an example is the support for modifying existing recruitment practices – moving to direct CV upload, to make this process more accessible to more people. Continuing to build on the progress made will require developing the infrastructure for measuring progress and outcomes against the next Equality and Inclusion Strategy which is due to be written shortly. Continuing this improvement is important in any case but made more-so given how Bury as a place is changing too. Continuously communicating progress in a highly visible way, the progress made by each of the equality and inclusion groups, as well as the milestones achieved by the council against the next strategy is important for continued progress, of which there is a clear commitment in place to see this happen.

The council's approach to overview and scrutiny is also in a stronger place than was the case at the time of the last CPC. The Chairs of the overview and scrutiny committees work well together, feel engaged with, listened to and are well-briefed. The relationships between the Chairs and the work of the committees is symptomatic of relationships cross-party which are generally pragmatic and respectful in Bury. The council can continue to further benefit from overview and scrutiny by encouraging regular, quality informal dialogue between Cabinet members and the respective Chairs. Having these relationships helps to ensure that the work of the committees remains close to the most central decisions of the council and those affecting the borough, it helps ensure that the activity of overview and scrutiny is providing the most timely and relevant challenge as well as support for policy development.

The council has in place an extensive Audit Plan albeit with a relatively small team of internal auditors to service this plan. As a result, a lot of audit activity in the Audit Plan has been rolled forward to the following year. The council is also developing its

approach to risk management and the recently appointed lead officer is taking steps to enhance the approach that is in place. This requires ongoing ownership of risk from across the council and proactive senior sponsorship which is dispersed across those in leadership positions. More closely aligning risk and audit activity to the corporate priorities of the council can also help in this regard. Engaging earlier with risk and audit has the benefit of preventing issues or risks from developing, as well as saving time and effort later on by potentially reducing the amount of internal audit activity which leads to a limited assurance being given.

The council should consider how it can further develop the Audit Committee, which includes support for members and the nature and extent of items on the agenda. Deep dive risk explorations appear to have been beneficial as a model, weighing-up the number and focus of these items in future and whether if on occasion, less items of this nature might lead to greater benefit and engagement is worth consideration. The council does not currently have any independent persons on its Audit Committee after struggling to attract suitable people for these roles. Looking again at this can support the working of the Committee as can looking at how members of the Committee can be further supported to develop in these roles.

#### **4.4 Financial planning and management**

The council sought this Corporate Peer Challenge to provide feedback on the approach they are taking towards improving the corporate financial standing of the council. The peer team were able to observe how the council has an extremely challenging financial position, with a small window of opportunity to act now, to address this.

At the time of the peer challenge, the council's latest budget monitoring position (Quarter 2) showed that the council was forecasting a year-end overspend of £9.749m against a net revenue budget of £210.813m.

The level of forecast overspend reduced in-year from the forecast at Quarter 1, when an overspend of £13.2m was forecast for year-end. This improvement of around £3.45m between Q1 and Q2 is linked to a moratorium on spend, a process of monthly departmental budget challenge sessions and activity to look at whether any



of the 2024/25 savings could be brought forward.

Of the £9.749m forecast corporate overspend, children's services are forecasting a £10.865m overspend. This is based upon a £6.4m overspend in social care and safeguarding – linked to an increase in residential placement volumes, complexity of care packages and the number of agency staff employed. Education and Inclusion is overspending by £4.1m, which includes around £2.5m of costs previously funded through the Dedicated Schools Grant which has been transferred to the general fund. Overspend is also seen in Adult Social Care (£1.2m), and Operations (£1.7m).

The council is committed to continuing to work on this forecast overspend position, knowing that any overspend at the end of the year will lead to a reduction in the council's general reserves.

Looking ahead, a draft Medium Term Financial Plan shared with the team indicates a cumulative budget gap of £41.582m over the next three years to 2026/27 before proposed savings. This £41.582m breaks down into gaps of £22.611m in 2024/25, a further £12.789m in 2025/26 and a further £6.182m in 2026/27. The figures in later years will increase, if the council does not find permanent savings in the earlier years, or if the council resorts to using reserves at any point.

For 2024/25, work is needed quickly to develop further, deliverable savings proposals to deal with the £22.611m budget gap identified. The council has approved savings proposals of £5.368m for 2024/25 currently. If all of these approved budget proposals are delivered in full in 2024/25, the budget gap reduces to £17.243m. The council has developed a further indicative list of savings proposals for 2024/25 totalling £7m, although at present, only 34% come with a strong 'green' level of confidence that they would be delivered in full in 2024/25 and 35% are graded 'red' on this basis.

The council is aware of the need to balance the budget without a continuing reliance on reserves. The council had £22.7m in General Reserves as at 1<sup>st</sup> April 2023 and a further £86.710m in Earmarked Reserves. Those earmarked reserves include a £39m volatility and fiscal mitigation reserve. Whilst the most current reading of the council's balance sheet and reserves position is more promising compared to how reserves were interpreted previously, the council must deal with these pressures

now, to avoid an even more challenging situation materialising. The council has committed to a review of its earmarked reserves as part of this budget setting process.

It is important that the council develops a more informed collective oversight and ownership of financial performance across the organisation. This can be supported with clearer financial reporting both to officers and members – an issue that has been flagged by the External Auditor also. Improving the quality of financial reporting, will help to support collective understanding, ownership and the level of confidence in the council's financial governance.

An example of where the council can improve the collective understanding of the financial position, is how the team heard from a number of people at the council, a perception that the council's financial position would be fine, *"if Children's Social Care wasn't so high spending"*. The council has begun to take steps to address this perception, using analysis and advice to inform a children's financial plan for 2024/25. Whilst there is a high level of overspend in children's services, the council has historically spent less than its most similar councils elsewhere on children's social care. In 2022/23, LGInform data at the time of the peer challenge showed that the council spent £984.63 per 0-17 year old compared to £1,361.45 on average within the council's most similar CIPFA family – 27.7% less, which is a similar position in each of the last six years.

Building on the work undertaken over the summer by the council to better understand the underlying budget position for children's social care, it is important that the council is able to agree and finalise a budget position for children's social care that more accurately reflects anticipated budget spend for the service including demand at different points of the service, placement mix and agency cost, which also takes into account the experience of spend and demand in other similar councils. The team heard about the work the council has started on this and how business partners and analysts in the finance team have been particularly proactive and engaging in developing the children's finance position for 24/25. Using this to inform a single, more collectively understood MTFP for the council overall, will support collective ownership, accountability and delivery as 'One Council'. The team heard examples of

some movement towards a better shared understanding of finance in recent months which this should then build on.

Remaining alert on an ongoing basis to the position around those factors in children's social care that lead to spend and how they change over time will help the council to deal proactively with changes, before they manifest themselves into much heightened costs. This is to take on board the learning from other councils, where the dynamic environment in which this service exists, can see the in-year service experience depart from the budgeted / expected experience quite quickly due to demand and external agency placement costs (for example).

The council appointed a new interim chief finance officer (S151 Officer) in the two weeks leading up to the peer challenge. This appointment is seen as an important addition as they are roundly recognised as an experienced officer who can help to lead the improvement of the council's financial standing. The council has good people in the finance service, who are working well with other services in some areas. The council are encouraged to work with the current finance team to build on, support and complement the strengths that already exist. The council should also move quickly to appoint permanent financial leadership, to work with the interim CFO for as much of this 12 month interim period as possible. The pace of improvement in the council's financial management will increase with this, as will the sustainability of improvement over the medium-term.

At Quarter 2, the council forecasts that £18.888m of the £22.350m of identified savings will be delivered and in recent years:

- £13.7m / £16.4m of identified savings were delivered in 2022/23
- £5.5m / £8.1m were delivered in 2021/22.

Given the budget gap the council has to address, it is imperative that the council delivers on as much of the approved budget savings as possible, as without this, the budget pressure will only grow again. The council has successes in some parts of the organisation in delivering on budget savings and so, sharing the learning from this can help the council overall, as part of this collective ownership. There is also an

opportunity to look at any underlying causes of savings non-delivery and how these could be addressed to support future savings delivery too.

While developing the new Medium Term Financial Plan there is a significant opportunity for the council to focus on the resource side of the Plan. LGInform data shows that in 2022/23, the council failed to collect 7.27% of non-domestic business rates. This is higher than most CIPFA neighbours and double the group average of 3.01%. The new interim chief finance officer recognises there is an opportunity to widen corporate understanding of the resource elements of the Medium Term Financial Plan and how the senior team can contribute to ensuring the council generates maximum income as well as managing expenditure.

Finally, elsewhere in this report, the amount of exciting place based regeneration work that the council is engaged with is explored. More widely, the council has a three year capital programme which is heavily focused on regeneration and economic growth. A significant amount in the programme is front-loaded, with the approach to capital showing large levels of rephasing and carry forward taking place during the year, a practice that has been seen in each of the last three years. Whilst this has had the benefit of reducing in-year overspends it is not strong financial management. The council are encouraged to review the approach to capital programming and planning to help develop a more robust picture to work with.

#### **4.5 Capacity for improvement**

The peer team heard from people inside and outside the council, how the council is fortunate to have many great people who care deeply about Bury and are really keen to be part of one team working for the borough and its residents. Examples were given to the team of people going above and beyond their roles to help deal with the demands and pressures the council faces, to support local communities, as summarised positively by one officer the team met with *“there’s lots of pressure and lots of demand, but I’m still here 20 years later!”*

The most recent staff ‘Pulse’ survey shows that 81% of staff now feel encouraged to respectfully express any concerns they may have which is a significant increase from a score of 50% in 2018. The council does however recognise the need to increase the response rate to the staff survey, to increase the number of employee reviews

completed from around 53% and to increase the number of staff who share their equalities data, to support organisational and workforce improvement. Members of staff the team spoke with speak very positively about the improvements they have seen and welcome the improved internal communications and engagement experienced – describing how “this feels different” now. Externally, partners have observed how the council has changed in recent years, less focussed on providing internal services and more engaged with how the council is there to listen to and work with local communities.

People can see how Bury as a place is changing and are really positive about the difference this represents. This momentum is set to continue to grow as the council's plans for regeneration and inclusive growth continue to come to fruition. The council has a high level of ambition here, as articulated in the 2030 vision, ensuring this continues to progress will require looking at the level of capacity the council has available for its place-based schemes to ensure it matches the scale of ambition and plans in place. This includes the regeneration plans across the borough, education, and the council estate to name just a few examples. A significant proportion of staff in place based roles are funded by capital funding, which by its nature will mean fixed term funding underpinning these roles.

Since 2003, the responsibility for the day-to-day running of the council's housing stock has sat with Six Town Housing, an arm's length management organisation (ALMO). Earlier this year, the council took the decision to bring this back 'in-house', following an options appraisal carried out independently. This presents opportunities to improve the offer to local tenants, as well as support local communities more widely. A transition of this nature is however a significant undertaking with a number of risks to consider and carefully manage. It is important that the council develops a deep, collective understanding and plan for the risks and opportunities around Six Town Housing and reflects the risks associated and their mitigations through the discussions informed by the Corporate Risk Register. In the short term, the council are encouraged to:

- Create a clear, suitably expert landing zone within the council for the ALMO, which has suitable levels of experience and knowledge and clear roles and lines of accountability.

- Continue the work started to ensure compliance with the sector's expectations of social housing.
- Continue work that has begun to more fully understand relative stock condition.
- Create a capital plan directly related to stock condition and expected standards.

From the above, the council can then produce a new 30-year Housing Revenue Account Business Plan which will guide the use of funding around a more informed view of stock quality, need and outcomes for local people.

Bringing the ALMO 'in-house' is one of the opportunities that the council can then also look at for the benefits that it brings more widely, against the priorities of the council and for the borough. This may include opportunities to support day-to-day operations within the public realm and the feeling of place that people experience, aligning this to how Bury more widely is changing and developing. The council is also actively considering the opportunities from this to improve the local experience of residents in engaging with social housing, linked to the neighbourhood model, as well as the opportunities to look at the combined corporate estate made available from this transition and how this could be most effectively and efficiently utilised.

As the council takes the steps to improve its financial standing, which supports the delivery of its priorities for Bury, establishing a suitably resourced corporate transformation strategy and plan, which is directly aligned to a new MTFP will be required. This will need to build upon a strengthening of relationships between corporate leadership and services and is an important part of embedding a 'One Council' approach. Given the time taken to implement transformational change, it is important this is tackled quickly and includes services to children and young people, blending in the work already begun.

To deliver on the scale of change and transformation the council will require to deal with its corporate financial position, there is a need to further develop the role and approach of core enabling functions, working well with services and building on examples of good practice already seen. This includes the role of finance (as



mentioned earlier in this report), HR and IT – given that continuing the digital improvement work already started is one of the areas that will support the wider transformation programme. This will need to consider the capacity of the services and prioritisation of work in order to focus on supporting the changes necessary. There may also be further opportunities in building on the strong integrated neighbourhood approach, to further rationalise and modernise the corporate estate which will also support this transformation programme.

The team heard from colleagues at the council, of the steps taken since the OFSTED inspection of children's social care in 2021. To continue to make the progress required, ahead of a full OFSTED ILACS re-inspection, it is important that the council is able to build the resilience of the children's leadership team which includes appointing to the vacant permanent posts within the structure. The council is moving towards the Family Safeguarding Model which appears to have been well received by the service. This is a model that has been seen elsewhere in the sector to be often attractive to social workers and so could be used as part of the recruitment strategy to reduce the reliance on agency workers. At the time of the peer challenge, around 48% of social workers were employed on temporary agency contracts, which the council are keen to reduce.

To support this shift, it is important to ensure a workforce strategy for children's social care is further developed which is suitably phased to reflect the anticipated demand for services the council will expect. This involves looking ahead, taking into account the potential impact of different demand management initiatives including in particular revocation and re-unification. This strategy should also take into account the workforce and caseload requirements during different forms of recruitment, as well as the difference presented by the new Family Safeguarding model of practice. This strategy should help support the right environment for social work to thrive including reward, welfare and wellbeing.

Finally, outside of the net revenue account, the council has held a deficit position against the Dedicated Schools Grant (DSG) since 2012, with a deficit of £18.6m at the start of this financial year. The council was one of the first councils in the country to be included within the Project Safety Valve programme to help deal with a deficit of this nature, in January 2021. Whilst the deficit has reduced, the pace of improvement

in the performance of the service and the pace of reduction of the financial deficit needs to increase. With this in mind, over the Summer the council refreshed its plan for bringing about this improvement. This plan is now seen, by those the team spoke with, to be in a stronger position to bring about improvements in the service offer and deal with the cost pressures associated. Whilst it is not possible to provide assurance of this specific area, during a peer challenge of this corporate nature it is clear that in order to deliver on this plan, the council will need to ensure suitable project capacity, oversight and core service support is in place in a timely way to see this realised. It is important that the council rapidly embeds its very recent developments such as the graduated support pathway, its early years offer around SEND, and its specialist provision offer. There is an ideal opportunity to tie-in more closely the health offer to support children with special / additional needs, through the development and implementation of a new SEND strategy, together with an outcomes framework.

In summary, in order to match the council's ambitions and despite its difficult financial context, some careful investment in capacity and capability will help the organisation realise those ambitions and manage the context.

## 4. Next steps

It is recognised that senior political and managerial leadership will want to consider, discuss and reflect on these findings. The CPC process includes a progress review, which provides space for the council's senior leadership to update peers on its progress against the recommendations from this report and is due to take place in September 2024.

Both the peer team and LGA are keen to build on the relationships formed through the peer challenge. Claire Hogan, Principal Adviser for the North West region, is the main contact between your authority and the Local Government Association. Claire is available to discuss any further support the council requires.

[claire.hogan@local.gov.uk](mailto:claire.hogan@local.gov.uk).





<b>Classification:</b> Open	<b>Decision Type:</b> Key
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<b>Report to:</b>	Cabinet	<b>Date:</b> 17 April 2024
<b>Subject:</b>	Renewal of the Council's HR & Payroll Management System Contract (Part A)	
<b>Report of</b>	Cabinet Member for Corporate Affairs and HR	

### Summary

The Council's current HR and Payroll Management System, iTrent, was supplied by Midland HR, now called MHR International UK Limited (MHR). The system is core to the operational management of the council as an employer and is critical in ensuring employees are paid correctly and that the council is able to maintain HR records in accordance with statutory requirements. In recent years significant work has been undertaken to enhance the functionality of the system through the roll-out of employee and manager self-service. As well as the Council's central workforce, the system also provides the core infrastructure for HR and Payroll Management for Bury maintained schools and a range of external clients and partners for whom the Council provides a payroll service.

The Council has utilised iTrent since 2012 with the current arrangement agreed by Cabinet in 2020 and due to expire on 31<sup>st</sup> July 2024.

MHR is one of the most significant providers of HR and Payroll Management Systems to Local Authorities in the UK and iTrent is utilised by 8 of the 11 local authorities in Greater Manchester. – Given its use across the conurbation a framework contract was established across Greater Manchester in October 2022 with MHR. This gives constituent Councils a compliant route to contract with MHR and supports significant financial and delivery benefits.

Given the investment made in the iTrent system by Bury, the opportunity of the Greater Manchester Framework and the complexity and capacity needed for any full and competitive tender process this report sets out proposals to join the Greater Manchester framework and extend the Council's use of iTrent three years with the option to extend for a further two. During this period, officers will continue to explore and pursue opportunities for improvement and efficiencies in the use of the system to support the Council. This will be enabled by the integration of Payroll and HR services into a single Service as previously agreed by Cabinet.

### Recommendation(s)

1. To approve Bury's continued use of iTrent for an initial period of three years (August 2027) with the option to extend for a further two (August 2029).

2. To approve the direct award to MHR through the Greater Manchester Framework
3. To delegate the finalisation of the terms of the direct award to the Director of People and inclusion and Cabinet Member for HR and Corporate Affairs

### **Reasons for recommendation(s)**

Continuing to utilise iTrent and engaging MHR via the GM Framework allows the Council to continue to take advantage of the investment made in this product over recent years as well as the efficiencies available through the GM Framework.

### **Alternative options considered and rejected**

The alternative option would be to pursue a full re-tender process. This would take approximately 18 months and require significant additional capacity.

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### **Report Author and Contact Details:**

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## **1. Background**

- 1.1 The Council's HR & Payroll Management system, iTrent, is currently supplied by Midland HR (MHR). iTrent is a single robust and configurable platform which is adaptable to the Council's existing processes and requirements. The system is currently used to pay 8,538 individuals (as of January 2024). This includes Council Services, Schools, Academies, Pensioners and External Customers who have purchased our payroll service.
- 1.2 iTrent provides a single database that houses all people records; including personal information, employment history, payroll details, pre-employment checks, absence records and equality information. The system enables the Council to report in accordance with its statutory requirements including returns to HMRC for taxation purposes, pension returns, equality & gender pay reporting and both the school workforce and the social work censuses.
- 1.3 The Council's current contract with MHR has been in place since 31st August 2020 and is due to expire 31st July 2024.

## **2. Proposal**

- 2.1 Following a review of available options the proposal is to continue the Council's relationship with MHR and utilisation of iTrent. This will enable officers to build on the significant investments made in the system within the last three years which have overhauled and streamlined the Council's HR and Payroll processes, supporting both improvements and efficiencies.
- 2.2 At present, the Council contracts directly with MHR for iTrent. However, in recognition of the opportunity for efficiencies and potential further system improvements and integration a Greater Manchester level framework agreement for the provision of a HR and Payroll Management system was put in place in October 2022. MHR were awarded this contract following a full competitive process led by the GMCA and Tameside Council and a further six Local Authorities (including Bury) are either now part of this arrangement or working towards joining it.

### **2.3 *Advantages of joining the Greater Manchester Framework***

- 2.3.1 There are a number of advantages for the Council in joining the GM Framework including:
- A competitive fixed price contract agreed for the next five years following the GM led tendering process which provides the benefit of economies of scale. (This includes the costs associated with support for any future enhancements). – Prices through the GM Framework are fixed and, for Bury, represent a 20% saving in comparison to costs if the Council were directly to contract with MHR today. The Council's financial benefit here will grow significantly over the lifetime of the contract as it will not be subject to quarterly price rises which would form a standard term of engagement with MHR if an award outside the framework were made.
  - Strengthened contract management given the scale of the contract and support from dedicated contract management capacity employed on behalf of Greater Manchester HR Directors to oversee a number of joint contracts.
  - The ability to develop a more accurate picture of the workforce across Greater Manchester through integrating workforce reporting arrangements.
  - The opportunity to share learning and skills around system utilisation and development and integrate capacity here going forward.

### **2.4 *Building on the investment have already made***

- 2.4.1 The Council has invested significantly in developing its use of iTrent over recent years to improve service delivery and drive efficiencies building on movement to a Cloud Based approach early in the contract term. Continuing with this system will allow us to build on these developments. Key recent developments include:

- Annual leave – In April 2022, the Council moved away from paper based annual leave cards and automated this through iTrent. Employees can now manage their leave through self-service, managers can authorise/reject leave and HR can monitor leave balances to ensure employees are using their leave effectively.
- Absence automation – In April 2023, the Council moved away from manually calculating sickness and other absence entitlements. As with annual leave, employees and managers can enter the details into iTrent, follow the workflows that have been created and monitor trends and patterns. This has also decreased the amount of manual calculations that payroll are required to undertake and has assured consistency of sickness pay and compliance with statutory requirements here.
- Recruitment – In the last 12 months, the Council has streamlined a number of processes through the system including the new starter chain which streamlines the way new starters are set-up and the automation of letters which ensures accuracy and consistency with contracts. The Council has also recently launched an onboarding platform, which provides new starters with a checklist on all pre-employment checks, provides transparency on what is required and extra assurance with GDPR as confidential documents are not sent by email. It is anticipated that this will significantly decrease the time it takes to onboard a new starter.

## **2.5 Future developments**

2.5.1 Work is already underway on a number of future developments which will be supported through the new contractual arrangement with MHR.

- Automation of Offboarding – Reducing the need for payroll to manually move leavers within the system.
- Expenses – Expenses can be claimed for by utilising self-service, this reduces the need for a paper forms and can provide a clear authorisation and audit trail.
- Overtime - Overtime can be claimed for by utilising self-service, this reduces the need for a paper form and can provide a clear authorisation and audit trail.
- Checklists – A recent upgrade of the system has provided new functionality in relation to the processes carried out by HR and Payroll. Essentially each process can be mapped out as a to do list so that the person completing the process can ensure that all steps are followed, which will help ensure consistency. This functionality is currently being developed for processing new starters, contractual changes and leavers with future plans to widen this to support payroll processes.
- Improved reporting and Management Information – With the support of colleagues in the Council's IT and Performance teams work is underway to

enhance both management and strategic workforce reporting which will be driven directly via iTrent.

## 2.6 *Modules and Functionality*

2.6.1 As part of the contract renewal, Officers have taken the opportunity to review the licences and additional modules that are currently in place and ensure any modules not currently used or planned to be used are either removed from the costings or planned to be developed so that the Council maximises the contract as a whole. The benefit of joining the GM framework means that should the Council chose to develop the system further during the lifetime of the proposed contract then the module prices remain fixed price and can be added.

2.6.2 The below table lists those modules which are proposed for inclusion in the revised contract.

1 extra Hosted Database (TRAIN)	An additional database that is required to complete annual financial returns (Train environment)
Business Objects	The system that enables the Council to run reports and create bespoke reports to suit our requirements
Configurable questionnaires / Survey builder	Allows the creation of forms within iTrent, these are currently used for family friendly initiatives
Core HR	Management of core people, organisational structure & role data, including: <ul style="list-style-type: none"> <li>– Employee self service</li> <li>– Electronic signatures</li> <li>– GDPR (maintains data in line with legislation)</li> <li>– Insight dashboards</li> <li>– Mobile Access</li> <li>– Occupational Health &amp; Safety (recording of data)</li> <li>– Standard reports</li> <li>– Web services</li> <li>– Organisation charts</li> </ul>
Hosting 3 Databases	Standard iTrent databases that are necessary to run the system, maintenance and development (Live environment, Test environment & Development environment)
<b>Item</b>	<b>Purpose</b>
Learning administration	Management and administration of training and learning activities
Manager self service	Portal that managers access to see key data on their direct reports, currently used to manage leave, sickness, training and employee reviews
Onboarding (new starters)	Recruitment portal for new starters to enable them to provide pre-employment information and documents
Payroll	Management of core payroll functions including:

	<ul style="list-style-type: none"> <li>– Absence management</li> <li>– E-slips (Electronic payslips)</li> <li>– GL interface (extracts costing data)</li> <li>– Returns to HMRC &amp; Pension processing</li> <li>– Time &amp; attendance (flexi, TOIL, direct payments)</li> </ul>
Pension returns for LGPS annual, LGPS starters and leavers	To facilitate pension returns
Pensioners	Not included in Core HR/Payroll costs but charged 25% of unit cost. This amount will fluctuate depending on numbers
People development	Enables qualifications, professional memberships, pre-employment check information to be stored against employees
Performance management	Creation and Maintenance of performance reviews and check ins
Reporting interface	Enables the Council to link iTrent data with Business Objectives to run reports
SDDA	Secure direct database access
SECURE E-MAIL less than 12,000 messages	Allows text messages to be set for authentication when logging in
SES Escrow	Secures data and documentation which enables business continuity should the system fail

## 2.6 Costings and Funding

2.6.1 Due to the commercial confidentiality of the proposed contractual Arrangements financial information is included in a separate Part B report.

## 2.7 Procurement Compliance

2.7.1 As noted above, in 2022, a framework agreement was signed between the Greater Manchester Combined Authority and MHR for the provision of HR and Payroll services. This agreement allows individual authorities within GM to call off services and complete a direct award to MHR. A full procurement process was carried out by the GMCA as the basis for this award.

2.7.2 The proposed approach has been confirmed with the Council's procurement team.

## 3. Next steps

3.1 Subject to approval by Cabinet, Officers will engage directly with the Council's MHR Account Manager who will draw up the necessary contract for review by the Council's legal team and agreement to join the GM framework. The contract will begin on the 1<sup>st</sup> of August 2024 and will run for three years initially until 31<sup>st</sup> July 2027 with the option to extend for a further two years, to 31<sup>st</sup> July 2029.

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**Links with the Corporate Priorities:**

The Council's HR and Payroll system is pivotal to the delivery of all Council services that play their part in the Let's Do It Strategy. Without the system we would be unable to pay our employees, maintain our workforce, monitor our recruitment and retention and provide key metrics that we can compare with our neighbouring boroughs within the Greater Manchester area and beyond.

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**Equality Impact and Considerations:**

An Equality Impact Assessment has been completed which confirms there is no impact/risk.

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**Environmental Impact and Considerations:**

No impact on the environment as an internal system which is already in place.

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**Assessment and Mitigation of Risk:**

Risk / opportunity	Mitigation
Risk – There is low risk of challenge around not completing a full procurement process.	The Council must have a functioning system to support business critical processes and the current contract comes to an end in August. The Greater Manchester Combined Authority has completed a full tender exercise on behalf of the group and all bar three authorities are set to join this framework.
Risk – Doing nothing is not viable.	By joining the GM framework, we can seamlessly continue with business critical function with minimal impact of business continuity whilst minimising costs.

<p>Risk – The contract cost is based on employee numbers. A significant number of employees may move away from Council payroll services in the coming few years, in particular, as schools move to academies and transfer to alternative providers.</p>	<p>The impact of known academy transfers has been built into the contract negotiations and modelling.</p> <p>Engagement for a three-year period initially (as opposed to a straight five year term) present the Council with the opportunity to consider re-setting employee numbers after this period.</p> <p>A minimum contract duration is required by the GM Framework and engagement outside of this would cost significantly more.</p>
<p>Opportunity – Having a single approach across GM has a number of advantages which have been highlighted above.</p>	

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### Legal Implications:

The use of the GMCA single supplier framework with MHR is compliant with both the Public Contracts Regulations 2015 and the Council's Contract Procedure Rules. Compliance with both sets of rules is required due to high value of the proposed contract.

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### Financial Implications:

The financial implications of this decision are set out in part B of the report. These should be contained within the budget framework set in February 2024.

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### Appendices:

N/A

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### Background papers:

None.

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

Term	Meaning
GM	Greater Manchester
MHR	Midland HR





<b>Classification:</b> Open	<b>Decision Type:</b> Non-Key
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<b>Report to:</b>	Cabinet	<b>Date:</b> 17 April 2024
<b>Subject:</b>	Constitution Update	
<b>Report of</b>	Cabinet Member for Corporate Affairs and HR	

### Summary

1. Local Choice Functions set out in Schedule 2 to the Local Authorities (Functions and Responsibilities) (England) Regulations 2000. These functions may be, but need not be, the responsibility of the council's executive. It is up to each council to decide.

### Recommendation(s)

2. Recommend to Council the updated Local Choice Functions.

### Reasons for recommendation(s)

3. Local Choice Functions are reviewed annually to ensure the correct functions are detailed and the required delegation is in place.

### Alternative options considered and rejected

4. None, the local choice functions are reviewed annually to ensure correct and appropriate delegations are in place.

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### Report Author and Contact Details:

*Name: Ruth Whittingham*

*Position: Head of Legal Services*

*Department: Legal Services*

*E-mail: r.whittingham@bury.gov.uk*

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### Background

5. Local Choice Functions set out in Schedule 2 to the Local Authorities (Functions and Responsibilities) (England) Regulations 2000. These functions may be, but need not be, the responsibility of the council's executive. It is up to each council to decide.
6. The Local Choice Functions have been reviewed and updated. The delegation for the following have been moved from the Chief Executive to the Solicitor to the Council
  - a. *The making of arrangements pursuant to sections 94(1) (1A) and (4) of the 1998 School Standards and Framework Act (admissions appeals).*

- b. *The making of arrangements pursuant to section 95(2) of, and schedule 25 to, the 1998 Act (children to whom section 87 applies: appeals by governing bodies).*

7. Functions in relation to contaminated land has also been added following the review.

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**Equality Impact and Considerations:**

8. Not applicable

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**Environmental Impact and Considerations:**

9. Not applicable

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**Assessment and Mitigation of Risk:**

Risk / opportunity	Mitigation
It is good practice for the Constitution to be regularly reviewed to ensure legal compliance.	Regular reports to Council and Cabinet

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**Legal Implications:**

10. The legal implications are set out in the body of the report. If Cabinet are minded to recommend the amendment to the functions this will then be considered by Council.

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**Financial Implications:**

11. There are no direct financial implications from approving this report.

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**Appendices:**

*Local Choice Functions*

## Section 2 - Local choice functions

The table below details who has the responsibility for these functions and the delegation arrangements.

### 3.2.1. Allocation of functions

3.2.2. These are functions which the Council can decide whether the responsibility is to be of the Executive ("an executive function") or the responsibility of the Council (a "non-executive" function). This section sets these functions out and designates them as executive or non-executive and details who is authorised to discharge them.

Responsibility for functions		
<b>What is the function which may but need not be the responsibility of the executive</b>	<b>Who has responsibility for the function</b>	<b>Who has the function been delegated to?</b>
1. Any function under a Local Act other than a function specified or referred to in regulation 2 or schedule 1 of the Local authority (functions and responsibilities) (England) Regulations 2000.	Cabinet	-
2. The determination of any appeal against any decision made by or on behalf of the Authority.	Council	Chief executive
3. The making of arrangements in relation to appeals against the exclusion of pupils from maintained schools pursuant to section 52 of the Education Act 2002 and the subordinate legislation made under that section.	Cabinet	Chief executive
4. The making of arrangements pursuant to sections 94(1) (1A) and (4) of the 1998 School Standards and	Council	Solicitor to the Council

Framework Act (admissions appeals).		
5. The making of arrangements pursuant to section 95(2) of, and schedule 25 to, the 1998 Act (children to whom section 87 applies: appeals by governing bodies).	Cabinet	Solicitor to the Council
6. The discharge of any function relating to the control of pollution or the management of air quality.	Cabinet	Chief executive
7. The service of an abatement notice in respect of a statutory nuisance.	Cabinet	Chief executive
8. The passing of a resolution that schedule 2 to the Noise and Statutory Nuisance Act 1993 should apply in the authority's area.	Cabinet	Chief executive
9. The inspection of the authority's area to detect any statutory nuisance.	Cabinet	Chief executive
10. The investigation of any complaint as to the existence of a statutory nuisance.	Cabinet	Chief executive
11. The obtaining of information under section 330 of the Town and Country Planning Act 1990.	Cabinet	Chief executive
12. The obtaining of particulars of persons interested in land under section 16 of the Local Government (Miscellaneous Provisions) Act 1976.	Cabinet	Chief executive
13. The making of agreements for the execution of highways works.	Cabinet	Chief executive
14. The appointment of any individual:	(a) Cabinet	(a) Chief Executive (b and c) Chief Executive

<p>(a) to any office other than an office in which he is employed by the authority;</p> <p>(b) to anybody other than:</p> <p>(i) the authority;</p> <p>(ii) a joint committee or sub-committee of such a body; or</p> <p>(c) to any committee or sub-committee of such a body</p> <p>and the revocation of any such appointment.</p>	<p>(b and c) Council where allocation of seats is politically proportionate</p> <p>(b and c) Cabinet</p>	
15. The making of agreements with other local authorities for placing staff at the disposal of those other authorities	Cabinet	Chief executive
16. Any function relating to contaminated land	Cabinet	Chief executive

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**MINUTES OF THE MEETING OF THE GREATER MANCHESTER COMBINED  
AUTHORITY HELD ON FRIDAY 23RD FEBRUARY 2024 AT MANCHESTER CITY  
COUNCIL CHAMBER**

**PRESENT**

Mayor of Greater Manchester	Andy Burnham (in the Chair)
Deputy Mayor (Police, Crime & Fire)	Kate Green
Bolton	Councillor Nicholas Peel
Bury	Councillor Lucy Smith
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
Wigan	Councillor Nazia Rehman

**ALSO IN ATTENDANCE:**

Rochdale	Councillor Janet Emsley
GM Older People's Equality Panel	Nakib Narat

**OFFICERS IN ATTENDANCE:**

Chief Executive Officer, GMCA & TfGM	Eamonn Boylan
GMCA Deputy Chief Executive	Andrew Lightfoot
GMCA Deputy Monitoring Officer	Melinda Edwards
GMCA Deputy Monitoring Officer	Gwynne Williams
GMCA Treasurer	Steve Wilson
GMCA Director of Governance & Scrutiny	Julie Connor
Bolton	Sue Johnson
Bury	Lynne Ridsdale

Manchester	Joanne Roney
Oldham	Harry Catherall
Rochdale	Steve Rumbelow
Salford	Tom Stannard
Stockport	Michael Cullen
Tameside	Julian Jackson
Trafford	Sara Todd
Wigan	Alison McKenzie-Folan
TfGM	Martin Lax
TfGM	Anne Marie Purcell
TfGM	Steve Warrener
Office of the GM Mayor	Kevin Lee
GMCA	Sylvia Welsh
GMCA	Lee Teasdale

#### **GMCA 29/24      APOLOGIES**

That apologies be received from Councillor Eamonn O'Brien (Bury), Councillor Arooj Shah (Oldham), Councillor David Molyneux (Wigan), Caroline Simpson (Stockport), Sandra Stewart (Tameside) and Councillor Nadim Muslim (Chair of the GM Overview & Scrutiny Committee).

#### **GMCA 30/24      CHAIRS ANNOUNCEMENTS AND URGENT BUSINESS**

The Mayor of Greater Manchester, Andy Burnham, advised those present of the sad news that a member of the Manchester Music Commission, Sam Malik, had passed away unexpectedly the previous weekend. Sam had played a hugely important role within the Manchester and wider music community and his kindness, passion and support for the next generation of talent would be greatly missed.

#### **RESOLVED /-**

That the GMCA acknowledges the sad passing of Sam Malik, a valued member of the Manchester Music Commission, and that condolences be passed on to his family, friends and the wider Manchester music community impacted by this.



**GMCA 31/24            DECLARATIONS OF INTEREST**

**RESOLVED /-**

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

**GMCA 32/24            MINUTES OF THE GMCA MEETING HELD ON 9 FEBRUARY  
2024**

**RESOLVED /-**

That the minutes of the GMCA meeting held on 9 February 2024 be approved as a correct record.

**GMCA 33/24            MINUTES OF THE GREATER MANCHESTER OVERVIEW &  
SCRUTINY COMMITTEE HELD ON 7 FEBRUARY 2024**

**RESOLVED /-**

That the proceedings of the Overview & Scrutiny Committee meeting held on 7 February 2024 be received.

**GMCA 34/24            COMMERATION OF THE UKRAINIAN HOLODOMOR**

The Mayor of Greater Manchester, Andy Burnham, presented a report asking GMCA members to recognise the 1932-33 Holodomor as a genocide of the Ukrainian people and to endorse the statement contained within part 2 of the report, at the request of the GM Ukrainian Community.

The Mayor confirmed that following the meeting he would be attending a press event with representatives of the region's Ukrainian community, both long-standing and new arrivals following the onset of the current conflict.

It was also advised that a support network had been established for the Mayor of Lviv, who sought to make Lviv the 'rehabilitation centre' of Ukraine and had requested that mayors be convened to provide support for this through an 'Unbroken Cities' network.

**RESOLVED /-**

1. That the contents of the report be noted.
2. That the update on the 'Unbroken Cities' network plans to support the Mayor of Lviv on the development of a rehabilitation centre be received.
3. That the GMCA endorses the following statement:
  - *The Holodomor was an act of genocide against Ukrainians in 1932-33.*
  - *The GMCA recognises the 4th Saturday of November as a day of remembrance for the innocent victims of the Holodomor.*

**GMCA 35/24          HOMELESSNESS FROM THE ASYLUM SYSTEM – UPDATE  
AND RESPONSE**

City Mayor, Paul Dennett, Portfolio Lead for Housing, Homelessness & Infrastructure, provided an update on the current homelessness and rough sleeping crisis across Greater Manchester as a result of Home Office accelerated asylum decision-making and sought approval for a shared Greater Manchester (GM) approach to tackling it.

A humanitarian crisis was now being faced within the city region as a result of this decision. Government did not appear to want to work with Greater Manchester in a constructive way to tackling this issue resulting in an increasing chaotic situation. Elements such as the delays in the uplift of local housing allowance and the renters reform bill were further exacerbating this issue. People were now having to be turned away from support due to the significant undercapacity available to meet housing demands. This was on top of the pre-existing homelessness demands within the system. The report included a number of recommendations to government to help in providing temporary alleviation of the pressures.

Further detail was provided on the real day to day impact being seen particularly acutely within central Manchester. Since November 2023 Manchester City Council had seen daily presentations of between 35-50 people. These were vulnerable people who had fled persecution and conflict and had received confirmation that under international law that they had a right to reside in this country yet being quickly dispersed from temporary accommodation and arriving at Manchester Town Hall. This week numbers had risen to an unprecedented level with over 60 presentations every single day.

**RESOLVED /-**

1. That the unprecedented levels of homelessness and rough sleeping among new refugees in Greater Manchester, the linked service pressures and the opportunities for improvements to our service offer to this cohort, now and in the longer-term be noted.
2. That support be given to efforts to secure additional funds to boost Voluntary Community Faith Social Enterprise (VCFSE) provision for this cohort, with a focus on prevention and Private Rented Sector (PRS) access, and ensure that Housing Options and homelessness teams support delivery of GMCA-commissioned services.
3. That the continued or additional investment in capacity for specialist frontline support for people in or leaving the asylum system, especially across homelessness, social services, education teams, using current and future (potential) Asylum Dispersal Grant funding be considered.
4. That support be given for continued engagement with national Government and efforts to evidence and communicate impacts on people, services and communities are visible more widely.
5. That support be given to shared key policy asks in order to:
  - i. give GM's local systems time to recover;

- ii. fund GM's systems to enable effective response now and in the longer term;
  - iii. improve transitions from the asylum system and;
  - iv. address wider policy issues that are preventing access to affordable housing.
6. That the update received on the ongoing significant pressures placed upon local authorities in meeting homelessness need as a result of failures in national migration and asylum policy be noted.

**GMCA 36/24                      PUBLIC SWITCHED TELEPHONE NETWORK (PSTN)  
SWITCHOVER UPDATE**

Councillor Nicolas Peel, Portfolio Lead for Digital, introduced a report providing an update following the growing concerns about the implementation of the PSTN Switchover which is impacting upon a significant number of vulnerable people and across the city region.

This issue was becoming an increasing concern as the government's decision for this to be an industry led switchover was resulting in a continuing lack of national communications on this issue, which in turn meant a continued lack of awareness. Telecare systems were the most pressing issue at present, as despite assurances that care would be taken, some users of telecare systems were being switched over without any communication and sufficient checks that their lifeline devices would still operate effectively. Significant safeguarding issues had already arisen from this.

The cost of the upgrades was also an issue, with the cost of upgrades being passed on to customers in many instances. With all of this in mind, a number of further recommendations were being made to the government as detailed within the report, with the ultimate resolution being that if these problems persisted, there would be a further ask that the December 2025 deadline be pushed back.

**RESOLVED /-**

1. That the significant issues in telecare arising from the PSTN switchover rollout be noted.

2. That support be given to further action including correspondence with Government to urge action in response to the current risk to adults, and to develop a funded National Action Plan that includes telecare switchover working with telecommunications providers, the telecare industry and the LGA.
3. That the establishment of the GM PSTN Working Group as a forum to assess the readiness of GM for the switch over, share best practice and bring forward significant issues as they arise be noted.
4. That it be noted that there has been an exchange of letters between the Mayor and DSIT Secretary of State in December 2023 and January 2024 regarding increasing concerns of the PSTN switchover.
5. That it be noted that a further paper would be brought back to the GMCA asking the government for an extension to the switchover deadline.

#### **GMCA 37/24            GREATER MANCHESTER AGE-FRIENDLY STRATEGY**

Sara Todd, Portfolio Lead Chief Executive for Equalities and Communities, introduced a report providing an overview of the new Greater Manchester Age-Friendly Strategy 2024 – 2034 and the process taken to refresh it.

It was advised that following final consultations with stakeholders and the International Advisory board, the GM Age-Friendly strategy had been finalised for the GMCA's consideration and approval. A detailed implementation plan would be developed in the coming months and finalised in June 2024. As cities around the world took steps to adapt to demographic change, Greater Manchester was at the forefront of initiatives to ensure our societies are more age-friendly.

The new age-friendly strategy was ambitious in improving life for all residents as they age. Some key commitments within the strategy included engaging with employers to raise employment standards of older workers by improving health and wellbeing at work; working towards neighbourhoods where older residents live in age-friendly homes; and continuing to collaborate with national and international partners to

develop evidence-based policy and support businesses in the flourishing healthy ageing sector in Greater Manchester to grow, innovate and commercialise.

Nakib Narat, in his position as the Co-Chair of the Greater Manchester Older People's Equality Panel was invited to address the GMCA. Reference was made to the many difficulties faced by older residents of the city region in recent years following the onset of the Covid 19 pandemic and then the cost-of-living crisis. This Strategy would put older people's voices at its heart and ensure that they were always heard, in addition to reflecting the diversity of the region's older people.

Thanks were expressed to the Older People's Equality Panel and the supporting officers, whose considerable work and sharing of knowledge, had pulled together a progressive forward-thinking Strategy.

**RESOLVED /-**

1. That the refreshed Greater Manchester Age-Friendly Strategy be approved.
2. That the comments received from Nakib Narat, the Chair of the GM Older People's Equality Panel, be noted.
3. That thanks be expressed to all political and officer leads for their considerable work on developing the refreshed Strategy.

**GMCA 38/24                      NET ZERO ACCELERATOR FUND**

Councillor Tom Ross, Portfolio Lead for Green City Region, provided an update on a recent unsuccessful bid for Innovate UK Pathfinder funding and the alternative opportunity to deliver a Net Zero Accelerator in Greater Manchester.

**RESOLVED /-**

1. That the update on Innovate UK funding and the opportunity to deliver a Net Zero Accelerator be noted.

2. That approval be given to GMCA submitting a business case and acting as the accountable body for a circa £6-7m award from Department of Energy Security and Net Zero (DESNZ) potentially via Cambridge and Peterborough Combined Authority, with delegated authority to the Lead Portfolio holder, Chief Executive and Treasurer to finalise the business case, receive and defray funding if successful.

## **GMCA 39/24            GREATER MANCHESTER INVESTMENT ZONE**

Councillor Bev Craig, Portfolio Lead for Economy & Business, presented a report that provided further updates on the Investment Plan being developed for Greater Manchester.

The report set out the exciting opportunities that could be capitalised on within the long-term strategy, with a significant focus on advanced materials. The report also requested that the final negotiations be delegated appropriately with a final report to be submitted to the GMCA detailing how the monies would be spent and how growth and benefits would be delivered for the whole city region.

### **RESOLVED -/**

1. That authority be delegated to the GMCA Chief Executive Officer and Treasurer, in consultation with the Economy Portfolio Chief Executive and Leader, to negotiate with Government project allocations in 2024-25.
2. That a further update will be provided to the GMCA, following Ministerial approval, confirming the project allocations in 2024-25, and overall indicative allocations across the programme as a whole be noted.
3. That the further detail sought by members on the GM Investment Zone Package be made available at the appropriate time.

**GMCA 40/24                      GREATER MANCHESTER INVESTMENT FRAMEWORK**

Steve Wilson, GMCA Treasurer, presented a report seeking approval for investments into Advanced Therapeutic Materials Ltd, Financielle Ltd and Home Global Holdings Ltd. These investments would be made from recycled funds.

**RESOLVED /-**

1. That an equity investment of up to £500k to Advanced Therapeutic Materials Ltd be approved.
2. That a convertible loan of up to £400k to Financielle Ltd be approved.
3. That a loan of up to £300k to Home Global Holdings Ltd be approved.
4. 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 investments, and, subject to their satisfactory review and agreement of the due diligence information and the overall detailed commercial terms of the investments, to sign off any outstanding conditions, issue final approvals and complete any necessary related documentation in respect of the investments noted above.

**GMCA 41/24                      DELIVERING THE BEE NETWORK – BUS FRANCHISING  
IMPLEMENTATION UPDATE**

The Mayor of Greater Manchester, Andy Burnham provided an update on progress made in implementing bus franchising as part of the delivery of the Bee Network, Greater Manchester' vision for an integrated, 'London-style' transport system.

The Mayor highlighted the increasingly positive position of the Network, with the initial tranche one teething issues now largely worked through. The latest punctuality report revealed that the average was now at 71.5%, this was an improvement on previous weeks, but even more importantly, considerably better than the non-franchised numbers which had been running at a considerably lower number.



Plans for the Night Bus Pilot, which would focus on the V1 and 36 services were confirmed for commencing in 2024 at a date to be confirmed.

Further detail was provided on Tranche 2 which was due to commence on 24<sup>th</sup> March 2024. Many services within this Tranche would see an increase in frequency, with many services that would usually see four buses an hour now rising to six, alongside earlier and later start and finish times.

**RESOLVED /-**

1. That the progress towards the implementation of Tranche 2 of bus franchising be noted.
2. That the update received on the Bee Network Night Bus Pilot be noted.

**GMCA 42/24            THE GREATER MANCHESTER FRANCHISING SCHEME FOR BUSES 2021 – PROCUREMENT UPDATE**

The Mayor of Greater Manchester, Andy Burnham, introduced a report that provided an update, and made a number of recommendations, in relation to the procurement process for the Greater Manchester Franchising Scheme for Buses 2021, in particular to note and agree the outcome of the process to procure service providers to operate the five Large Local Service Contracts in Sub-Area C of the Scheme.

Five further reports on the outcome of the evaluation of tenders in relation to these Large Local Service Contracts had been submitted in Part B of the agenda.

The Mayor confirmed that the GMCA Overview & Scrutiny Committee had considered the update at its meeting of 21<sup>st</sup> February and in Councillor Nadim Muslim's absence highlighted the feedback raised through the Committee.

Reference was made to the wish to bring some local rail lines under the Bee Network umbrella in the forthcoming years. It was confirmed that the government had given the green light to a contactless payment pilot scheme on 2 lines with GM during 2025.

The Mayor confirmed that the new Stockport Interchange would open on 17<sup>th</sup> March, a week ahead of Tranche 2 going live, and that the electric buses on order for the south of the city region would be delivered in November 2024 and would operate out of Stockport Interchange.

**RESOLVED /-**

1. That the outcome of the process to procure a preferred service provider to operate the Hyde Road, Sharston, Stockport, Tameside and Wythenshawe Large Local Service Contracts in Sub-Area C of the Scheme be noted and agreed.
2. That the proposed key contractual arrangements of the Hyde Road, Sharston, Stockport, Tameside and Wythenshawe Large Local Service Contracts be noted.
3. That the comments of the GMCA Overview & Scrutiny Committee be received and noted.
4. That the update received on the proposal for a contactless rail pilot scheme to take place within Greater Manchester in 2025 be noted.
5. That it be noted that the new Stockport Interchange will officially be opened on 17<sup>th</sup> March.
6. That it be noted that a new fleet of electric buses will operate out of South Manchester from November 2024, ahead of Tranche 3 going live in early 2025.

**GMCA 43/24                      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 44/24                      GREATER MANCHESTER INVESTMENT FRAMEWORK**

**Clerk's Note:** This item was considered in support of the report considered in Part A of the agenda (minute 40/24)

**RESOLVED /-**

That the contents of the report be noted.

**GMCA 45/24            GREATER MANCHESTER FRANCHISING SCHEME FOR  
BUSES 2021 – PROCUREMENT UPDATE**

**Clerk's Note:** This item was considered in support of the report considered in Part A of the agenda (minute 42/24)

**RESOLVED /-**

That the comments received from the GM Overview & Scrutiny Committee be noted.

**45/24a. Procurement of the Tranche 3 Hyde Road Large Local  
Service Contract**

That the recommendations within the report be approved.

**45/24b. Procurement of the Tranche 3 Hyde Road Large Local  
Service Contract**

That the recommendations within the report be approved.

**45/24c. Procurement of the Tranche 3 Hyde Road Large Local  
Service Contract**

That the recommendations within the report be approved.

**45/24d. Procurement of the Tranche 3 Hyde Road Large Local  
Service Contract**

That the recommendations within the report be approved.

**45/24e. Procurement of the Tranche 3 Hyde Road Large Local  
Service Contract**

That the recommendations within the report be approved.

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

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