

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), 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), T Tariq (Deputy Leader and Cabinet Member, Health and Wellbeing), S Thorpe (Cabinet Member, Finance and Transformation) and S Walmsley (Cabinet Member, Communities and Inclusion)

Dear Member/Colleague

Cabinet

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

Date:	Wednesday, 5 June 2024
Place:	Bury Town Hall
Time:	6.00 pm
Briefing Facilities:	If Opposition Members and Co-opted Members require briefing on any particular item on the Agenda, the appropriate Director/Senior Officer originating the related report should be contacted.
Notes:	

AGENDA

1 APOLOGIES FOR ABSENCE

2 DECLARATIONS OF INTEREST

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

3 PUBLIC QUESTION TIME

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

Notice of any question must be given to Democratic Services by midday on Monday, Monday 3rd June 2024. Approximately 30 minutes will be set aside for Public Question Time, if required.

4 MEMBER QUESTION TIME

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

Notice of any Member question must be given to the Monitoring Officer by midday Friday 31st May 2024.

5 MINUTES *(Pages 5 - 10)*

Minutes from the meeting held on 17th April 2024 are attached.

6 APPOINTMENT OF CORPORATE PARENTING CHAMPION

Each Committee is required to have a nominated Corporate Parenting Champion; they will receive training from Childrens Services and will be responsible for advocating for Corporate Parenting matters in each committee. Champions will be appointed by each Committee at their first meeting of the municipal year.

If the representative wishes to also attend Corporate Parenting Boards scheduled for the municipal year 2024-2025 these are:

- 10th September 2024
- 03rd December 2024
- 09th January 2025
- 04th March 2025

7 ADULT SOCIAL CARE PERFORMANCE QUARTER FOUR REPORT 2023/24 *(Pages 11 - 34)*

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

8 CARE AT HOME REVIEW *(Pages 35 - 60)*

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

9 MILLWOOD PRIMARY SPECIAL SCHOOL - PROGRAMME UPDATE & REQUEST FOR APPROVAL TO APPOINT CONTRACTOR - PART A
(Pages 61 - 74)

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

10 PRU-PHASE 2-WHITEFIELD CENTRE-REQUEST APPROVAL TO INVITE TENDERS FOR WORK IN RELATION TO THE PUPIL REFERRAL UNIT - PART A *(Pages 75 - 92)*

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

11 DEVELOPER CONTRIBUTIONS FOR EDUCATION SUPPLEMENTARY PLANNING DOCUMENT- CONSULTATION DRAFT *(Pages 93 - 122)*

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

12 PERMISSION TO TENDER - RADCLIFFE ENTERPRISE CENTRE *(Pages 123 - 136)*

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

13 AWARDING OF FRESH FRUIT AND VEGETABLE CONTRACT TO A SUPPLIER ON BEHALF OF CATERING SERVICES *(Pages 137 - 150)*

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

14 URGENT BUSINESS

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

15 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.

16 MILLWOOD PRIMARY SPECIAL SCHOOL - PROGRAMME UPDATE & REQUEST FOR APPROVAL TO APPOINT CONTRACTOR - PART B
(Pages 151 - 156)

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

17 PRU-PHASE 2-WHITEFIELD CENTRE-REQUEST APPROVAL TO INVITE TENDERS FOR WORK IN RELATION TO THE PUPIL REFERRAL UNIT - PART B *(Pages 157 - 168)*

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

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Minutes of: CABINET

Date of Meeting: 17 April 2024

Present: Councillor E O'Brien (in the Chair)
Councillors R Gold, 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.

Apologies for Absence: Councillor C Cummins, Councillor C Morris and L Ridsdale

CA.152 APOLOGIES FOR ABSENCE

Apologies were received from Councillor Clare Cummins, Councillor Charlotte Morris, and Chief Executive Lynne Ridsdale.

CA.153 DECLARATIONS OF INTEREST

There were no declarations of interest.

CA.154 PUBLIC QUESTION TIME

There were no public questions.

CA.155 MEMBER QUESTION TIME

There were no Member questions.

CA.156 MINUTES

It was agreed:

That the minutes of the meeting held on 13th March 2024 be approved as a correct record.

CA.157 REVIEW OF NEIGHBOURHOOD HOUSING SUPPORT SERVICES- COMPLEX NEEDS AND FLOATING SUPPORT/DISPERSED ACCOMMODATION SERVICES

Councillor Tamoor Tariq, Cabinet Member for Health and Adult Care, presented the report which sought approval for the review of two lots of housing related support provision in Neighbourhood Housing Support services, namely Adullam Homes- Bury Bridges- Complex Needs Accommodation, and Calico Enterprise- Bury Gateway- Floating Support/Dispersed Accommodation.

There was a potential to bring both services together into more effective commissioning that provides a one service approach to housing related to support for people and households that are homeless or at risk of losing their tenancies but, as contract end dates do not align, this report proposed the extension of one service to bring them into line before a full review is carried out.

In response to a Member's query regarding timescales for the review, it was noted that soft market testing had begun, and co-production with both Adullam and Calico would begin upon approval tonight to ensure the review was completed early in the summer in order to meet September timescales.

Decision:

Cabinet:

1. Agreed to extend contractual arrangements of Calico Enterprise from the 1st July 2024 to 30th September 2024 to align with the end of contractual arrangements of Adullam at a cost of £151,233;
2. Agreed the review both services;
3. Agreed to the procurement of the services to a specification informed by the review; and
4. Noted that a further report setting out recommendations as to preferred bidders and costs would come to a future meeting.

Reasons for the decision:

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

Other options considered and rejected:

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.

CA.158 HOME TO SCHOOL TRAVEL ASSISTANCE AND TRANSPORT POLICY

Councillor Lucy Smith, Cabinet Member for Children and Young People, presented the report which sought the approval and adoption of a new policy of how the Council will meet its statutory duty to make necessary travel arrangements for all 'eligible children and young people'. This policy had been co-produced with parents and had been subject to consultation with a range of stakeholders.

In response to Members' questions, it was noted that the EHCP assessments would be carried out at the same time as transport assessments, therefore streamlining the process rather than creating additional appointments, and reflecting the feedback received from residents (a 'tell us once' approach'). With regards to regular reviews moving forwards, it was noted that relationships with parents had been strengthened through the co-production approach and officers would continue to build on these to ensure policies were up to date and appropriate, as part of the wider improvements to SEND governance.

Decision:

Cabinet:

1. Noted the outcome of consultation on the draft home to school travel assistance and transport policy, and
2. Approved the policy for implementation on the 1st June 2024.

Reasons for the decision:

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.

Other 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.

CA.159 CORPORATE PLAN 2024/25

Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs and HR, presented the 2024/25 Corporate Plan, which set out the strategic delivery objectives for Bury Council, in partnership with NHS GM Bury, over the next financial year. 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.

Members discussed a foodbank in Radcliffe and the difficulties in finding appropriate premises for it after August. It was noted that the organisation had particular needs which meant identifying premises was complicated, but the asset plan in the Corporate Plan would assist with searches like this so all options could be reviewed. With regards to evidencing the Corporate Peer Review suggestions, it was noted that the action plan from the review was included in the wider Plan and the smaller set of priorities should enable them to be met and reduce timescale slippage.

Decision:

Cabinet approved the Corporate Plan for 2024-25 and plans for reporting across the year.

Reasons for the decision:

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.

Other options considered and rejected:

N/A

CA.160 LOCAL GOVERNMENT ASSOCIATION CORPORATE PEER REVIEW

Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs and HR, presented the report which summarised the approach taken by the Local Government Association and the feedback received from the Peer Review Team from the full Corporate Peer Challenge (CPC) undertaken in December 2023. 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.

Members noted the feedback included praise for the high level of understanding of staff regarding the Let's Do It priorities and the strong relationships with health partners in the borough. Comments were received regarding improving governance and work would continue on aspects of organisational culture (including Member development). The Leader advised that it had been very useful feedback, and thanked the LGA team and all involved with the challenge.

Decision:

Cabinet:

1. Noted the progress made by the Council as captured in the Position Statement and Full Report from the Local Government Association; and
2. Agreed that the recommendations from the Challenge are accepted by the Council and incorporated into the 2024/25 Corporate Plan.

Reasons for the decision:

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.

Other options considered and rejected:

None applicable.

CA.161 RENEWAL OF THE COUNCIL'S HR & PAYROLL MANAGEMENT SYSTEM CONTRACT - PART A

Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs and HR, presented the report which set out proposals to join the Greater Manchester framework and extend the Council's use of iTrent, the Council's current HR and Payroll Management System, for 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, enabled by the integration of Payroll and HR services into a single Service as previously agreed by Cabinet.

Members discussed the idea of, in principle, sharing HR services with other Authorities and it was noted that this was not the intention at the moment but it would be the natural first step for any such arrangements. These would be complex however, as different Councils would use different versions of the iTrent system, or use them in different ways.

Decision:

Cabinet:

1. Approved 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. Approved the direct award to MHR through the Greater Manchester Framework; and
3. 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 the decision:

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.

Other 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.

CA.162 CONSTITUTION UPDATE

Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs and HR, presented the report which recommended some changes to the 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 Cabinet.

Decision:

Cabinet agreed to recommend the updated Local Choice Functions to Council.

Reasons for the decision:

Local Choice Functions are reviewed annually to ensure the correct functions are detailed and the required delegation is in place.

Other options considered and rejected:

None, the local choice functions are reviewed annually to ensure correct and appropriate delegations are in place.

CA.163 MINUTES OF ASSOCIATION OF GREATER MANCHESTER AUTHORITIES / GREATER MANCHESTER COMBINED AUTHORITY

It was agreed:

That the minutes of the Greater Manchester Combined Authority meeting held on 23rd February 2024 be noted.

CA.164 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.165 RENEWAL OF THE COUNCIL'S HR & PAYROLL MANAGEMENT SYSTEM CONTRACT - 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:

1. Approved 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. Approved the direct award to MHR through the Greater Manchester Framework; and
3. 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 the decision:

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.

Other 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.

COUNCILLOR E O'BRIEN
Chair

(Note: The meeting started at 6.00 pm and ended at 6.35 pm)

Classification: Open	Decision Type: Non-Key
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Report to:	Cabinet	Date: 05 June 2024
Subject:	Adult Social Care Performance Quarter Four Report 2023/24	
Report of	Deputy Leader and Cabinet Member for Health and Wellbeing	

Summary

1. This is the Adult Social Care Department Quarter 4 Report for 2023-24. The report outlines delivery of the Adult Social Care Strategic Plan, preparation for the new CQC Assessment regime for local authorities and provides an illustration and report on the department's performance framework.

Recommendation(s)

2. To note the report.

Reasons for recommendation(s)

3. N/A.

Alternative options considered and rejected.

4. N/A.

Report Author and Contact Details:

Name: Adrian Crook

Position: Director of Adult Social Services and Community Commissioning

Department: Health and Adult Care

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

Background

5. This is the Adult Social Care Department Performance Report, covering Quarter 4 of 2023-24.
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Links with the Corporate Priorities:

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

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

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

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

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

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

Equality Impact and Considerations:

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

7. N/A
-

Assessment and Mitigation of Risk:

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

Legal Implications:

7. The Council has statutory duties under the Care Act 2014 to promote individual wellbeing, prevent needs for care and support, to provide information and advice and to safeguard adults at risk of abuse and neglect. The provision of this report evidences compliance against those duties and the Adult Social Care Strategic Plan, the new CQC assessment regime and provides an update regarding progress against the department's performance framework.

Financial Implications:

8. N/A.
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Appendices:

Appendix - Data sources and what good looks like.

Background papers:

Adult Social Care Strategic Plan 2023-2026

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

Term	Meaning
CQC	Care Quality Commission

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

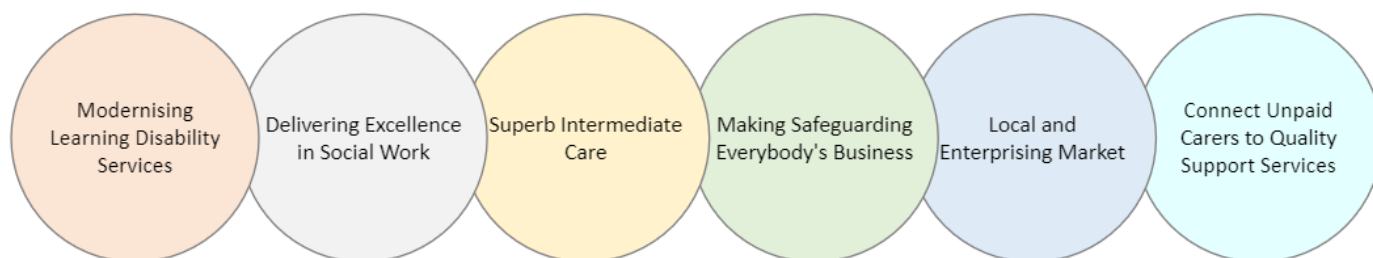
1.0 Executive Summary

- 1.1 This report provides a summary of the performance of the Adult Social Care Department during Quarter 4 of 2023-24. The report outlines delivery of the Adult Social Care Strategic Plan, preparation for the new CQC Assessment regime for local authorities and provides an update on the department's performance framework. It also provides an opportunity to reflect on the achievements of the last year and which areas require further improvement.
- 1.2 In the last year the department has been the busiest ever and broke many records with the number of people benefiting from intermediate care rising to over 6000, the number receiving an assessment under the Care Act or from an Occupational Therapist or as a Carer to over 2700 and the number of people we support with a service every day rising to over 2555. This is an increase of 180 or 8% in the last year and an increase of 501 or 24% from this time 2 years ago. The department also experienced 16% inflation in the care sector driven by positive national living and real living wage rises and large increases in utility costs.
- 1.3 Despite the scale of this activity the business plan identified clear priorities for our department and set several obsessions we wanted to improve. This focus has led to some clear improvement in most areas and identified some further ones where we still need to do more.
- 1.4 As part of our priority to modernise learning disability services we wanted to provide the opportunity for people who draw on our care and support services to move to more modern accommodation. In the last year we have delivered over 40 new places for people to live, ranging from single houses to small development of apartments. This has seen over £6.5m of new investment in property in the borough in one year alone. That's definitely **enterprising**.
- 1.5 Supporting people to move to this new accommodation has also freed up capacity in our borough and enabled 46 people to return to support in borough **local** to their friends and family. We now rank 4 out of 23 in the Northwest for having fewer people with learning disabilities living outside our borough. One new accommodation scheme alone created over 17 new jobs in Bury.
- 1.6 We wanted to ensure that more people than ever had an opportunity to live well at home and retain their independence and we obsessed about delivering superb intermediate care and making sure people who left our short-term services were as independent as possible. When we started, 81% of people left these services independent; it is now up to 84% and we have improved from 11th out of 23 in the Northwest to 8th. Working **together** with our NHS partners and building on the **strengths** of our users have delivered these improvements in a bumper busy year were around 6500 people benefited from our rapid response and intermediate care services.

- 1.7 Reducing the use of care homes is proving more challenging and we finished the year supporting 14 more than last year. This however is only growth of 1.8% when the population in the age range most likely to use care homes has gone up by 6%. We will keep focusing on this next year.
- 1.8 We knew we were not good at asking people what they hoped to achieve when going through a safeguarding enquiry or making sure they achieved these outcomes. We started the year only asking 57% what they wanted and only achieving these outcomes 39% of the time. This meant we ranked 21 out of 23 in the Northwest. Following the adoption of this as one of our obsessions we now ask 87% and achieve these outcomes 43% increasing our rank to 14 out of 23. Great progress but still more to do
- 1.9 We have been passionate this year about ensuring our users get quality care and support and experience a quality service from adult social care. We have seen big changes in these areas which can be seen later in this report. The annual adult social care users survey results from Bury shows our users reporting higher quality of life scores, greater control, better overall satisfaction and big jump in how safe the people who draw on our care and support feel. The details on these survey results can be found in 4.9 below.
- 1.10 We have also been supporting our care providers to achieve great quality ratings and 83.6% of our care home beds are rated Good or better, this is the highest in 3 years and remains well above the England average.
- 1.11 We wanted to make sure that more of our adults with disabilities were in paid employment and we've done a lot towards this by collaborating with a greater Manchester scheme who achieved the most job offers of all GM Localities and supporting our own internal service, BEST, having its best year ever with helping 20 people find work. So we are not sure why this measure is not moving yet. It may be our counting or it may be that even more effort is needed so we'll keep obsessing about this one next year.
- 1.12 We have seen great progress in reducing the number of people waiting to see a social worker with numbers waiting dropping from 270 at this time last year to 93 now. More work is needed to reduce this further and a government grant is being used to invest in some extra social workers to achieve this.
- 1.13 Finally following investment utilising government funding, we are seeing the number of people waiting for a review start to reduce which is great progress but accept more progress is needed here. It might have to be one of our obsessions for the year ahead.

2.0 Delivery of the Adult Social Care Strategic Plan

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



- 2.3 To build a health and social care system which will sustain our communities in the coming years within the funding available to us we need to look at providing support in different ways. Our journey over the next 3 years will be one of improvement and transformation, with the development of clear assurance mechanisms to enable transparency and accountability to the communities we serve. As we explore what social care delivery will look like 3 years from now, we will ensure that people who receive our support and their carers are at the heart of co-producing our social care delivery model and that their voice is central as we navigate through the financial and systemic changes we must make. The need for a new strategic priority to 'connect unpaid carers to quality support services' has been identified alongside the preparation of a new carers strategy in 2024/25 and progress will be included in future quarterly reports.
- 2.4 The 2023-26 Strategic Plan includes an annual delivery plan to deliver the service priorities, this is monitored on a quarterly basis. Quarter 4 highlights include:

2.4.1 Priority – Modernising Learning Disabilities

- The Bury Supported Employment Service has supported 20 people with learning disabilities into jobs in 2023/24. Its best ever year
- The GM Supported Employment scheme received 31 referrals, with 12 Bury people getting jobs since the scheme started.
- The GM Individual Placement Scheme has now started, supporting people with Learning Disabilities and Autism to be referred into the scheme.
- Our Shared Lives scheme ("fostering for adults", delivered by Persona) has been very successful in 23/24, with 27 placements, its best ever year; and resulting in equivalent cost savings of £80,000.
- The 'Towards Independence' project, continues to receive extremely positive feedback from Bury residents, families and professionals across the system as we work with people with learning disabilities to maximise their independence, choice and control. This 'strengths-based' approach, which aligns perfectly with Bury's "LET's Do It" values, is being embedded into ways of working in 24/25, with over 40 staff, system-wide being trained.

- We have worked hard to create homes to bring back people to live **locally** and Bury now has the 2nd lowest figure of people with learning disabilities living outside the borough in Greater Manchester and 4th lowest in the Northwest which is a huge improvement on our position 2 years ago. In addition, 17 **local** jobs have been created by working with Greater Manchester partners on opening supported accommodation for people with complex learning disabilities or mental health issues.
- Final figures for 23/24 for the number of people with learning disabilities (14 years +) receiving annual health checks will not be available until mid-May/early June, but latest performance via GM systems shows 82.5% activity levels against a national target of 75%, which is very very encouraging.
- 2.4.2 Priority – Delivering Excellence in Social Work
 - Social Work Workforce and Quality Boards have been established and are now running monthly.
 - A comprehensive learning needs analysis has been completed, led by Organisational Development, Corporate Core.
 - Mandatory autism and learning disabilities e-learning has been rolled to Adult Social Care staff.
 - Managers are undertaking case file audits which enables us to evidence if our Social Work practice during the person's journey from assessment to closure is of a good enough standard, and what improvements we need to make to support them.
 - In the next quarter we will be introducing a series of questions to the audits managers undertake that will add a much-needed layer to the audit findings where managers will contact the person receiving services or their carer to obtain direct feedback on their experience of the Social Work journey (intervention).
 - The Principal Social Worker has held a workshop to map the “coproduction” work the various services across the council are currently undertaking. The results of this are available and demonstrates many areas are obtaining feedback from people with lived experience of our services for example Killelea Intermediate Care, and Rapid Response, but we still have more to do with those who use our other services

2.4.3 Priority – Superb Intermediate Care

- Creation of stand-alone intermediate tier bed-based and home-based services completed.
- Evaluation underway of residents requiring ongoing care following discharge from IMC service.
- Hospital at Home service embedded under the Rapid Response service, facilitating people remaining in their own homes for hospital level care.
- The IMC tier have supported circa. 6,500 Bury residents (excluding equipment services and CareLink) in the past 12 months.
- Reablement now working with IMC at Home Service to improve better outcomes for Bury Residents.
- Quality assurance daily meetings taking place to improve standards and reduce ongoing support utilising the **strengths**-based model.
- The Bury community IV Therapy team has developed alongside the Rapid Response service maintaining more people at home, and not requiring hospital admission for treatment.

2.4.4 Priority – Making Safeguarding Everybody's Business

- Public-facing e-leaflet to help residents understand the adult safeguarding process in preparation.
- Scoping of safeguarding transformation project commenced.

2.4.5 Priority – A Local and Enterprising Care Market

- Blackburn Street, The Rock and St Mary's housing developments are about to open.
- Carers channel on the Bury Directory reviewed and updated.
- Care at Home review completed and contract to be extended
- Commissioning gap analysis completed, and actions built into new Service Improvement Plan.
- Quality ratings of care home services continue to improve as providers supported to return to Good rating

3.0 Update on CQC Assessment of Local Authorities

- 3.1 Since the CQC published its finalised assessment guidance for local authorities in December 2023, it has now contacted over 20 councils as it works towards assessments of all 153 councils over two years.
- 3.2 Local progress in terms of CQC Assessment readiness activity includes:
- Continuing to compile the CQC Information Return.
 - Preparation of the self-assessment of Adult Social Care in Bury.
 - A 'Getting the Call' plan has been drafted.
 - Local key contacts for the CQC for the voluntary sector, carers and advocacy organisations have been confirmed.
 - Briefings and support for adult social care staff are being delivered.

4.0 Highlight Report for Quarter 4, 2023/4

Obsessions	Performance Measures	Frequency	Polarity	Sparkline	Latest Data	Direction of Travel	Rank (higher is better)	
							CIPFA (16) 22/23	NW (24) Q3 23/24
<i>Reduce the number of people living in permanent nursing and residential care</i>	Long-term support needs (65+) are met by admission to residential and nursing care homes (per 100,000 population)	A	L		584	✓	14	20
	Number of individuals (65+) in a Permanent Residential placements (per 10,000 population)	Q	L		175	✗		21
	Number of individuals (65+) in a Permanent Nursing placements (per 10,000 population)	Q	L		43	✗		8
<i>Increase the number of people living well at home</i>	Quality of life of people who use services (composite survey metric out of 20)	A	H		19.11	✗	8	
	The proportion of people who use services who have control over their daily life	A	H		80%	✓	6	
	Proportion of services users in receipt of long-term community based services	Q	H		71%	✗		14
<i>Increase the number of people who have their safeguarding outcomes met</i>	Proportion of people who have their safeguarding outcomes fully met	Q	H		45%	✓		14
	Proportion of people who use services who feel safe	A	H		64%	✗	10	
<i>Increase the number of people leaving intermediate care services independently</i>	The proportion of people who received short-term services during the year where no further request was made for ongoing support	Q	H		84%	✓	8	8
	The proportion of older people (65+) who were still at home 91 days after discharge from hospital	A	H		87%	✗	8	
<i>Increase the number of people with a learning disability and/or autism who have their own front door and in paid employment</i>	Proportion of adults with a learning disability in paid employment	Q	H		2.4%	✗		15
	[Measure to be developed for recording people with their own front door]							
<i>Increase the number of people accessing care and support information and advice that promotes people's wellbeing and independence.</i>	The proportion of people and carers who use services who have found it easy to find information about services and/or support	A	H		66%	✓	11	
	The proportion of people who use services, who reported that they had as much social contact as they would like	A	H		46%	✓	11	

Annual Measures: Survey measures updated Q4 23/24, other ASCOF Q4 22/23
Quarterly Measures: updated Q4 23/24

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

Reduce the number of people living in permanent residential care.

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

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

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

Measuring residential home and nursing home use individually is available more frequently. This shows variation over the year, but we have ended up at the end of the year with 1.8% more people being supported to live in a care home. Whilst this is disappointing as the real number has not dropped it needs to be seen in the context of a rise in the population of the age group most likely to go into a care home of 6%

Increase the number living well at home.

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

The national adult social care survey was published in Q4 and the results are found at the end of this report where we have improved in every single question response.

Safeguarding outcomes

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

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

This indicator has improved again and now sits at 89% of people compared to 85% the previous quarter and 57% the quarter before. It demonstrates our safeguarding team are really obsessing about this and make sure we are definitely making safeguarding personal.

Increase the number of people living intermediate care independently.

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

Rarely do we find people keen to be dependent upon adult social care, so it is important we have services available that aim to prevent this. This is why continuing to improve these services are a key priority in our plan.

This indicator is available quarterly and shows that 84% of the people who use our intermediate care services receiving no ongoing long-term care which is an improvement on the 82% last quarter. which means we are currently ranked 8 out of 23 in the North West. The numbers using intermediate care services are shown later in the report and it's been a really busy quarter.

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

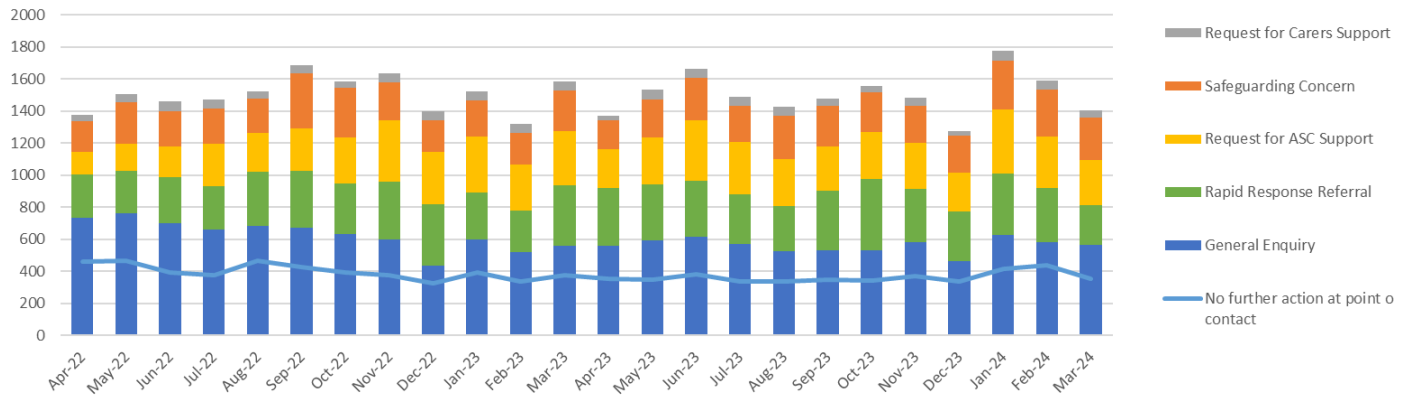
These 2 simple outcomes demonstrate if the borough is being successful in improving the inclusion of our resident adults living with learning disabilities. A key priority of our plan is to modernise our services and improve outcomes of those living with learning disabilities and the priorities chosen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

This data is available quarterly and we currently score 2.4% which is unchanged from last quarter. No change here is disappointing as improving this is one of our obsessions. We are going to be checking our data as this month our employment support service helped 4 people with learning disabilities get jobs which has been its best month ever. See further updates above on our ambition to modernise learning disability services for more detail on all the work taking place here.

4.1 Contacts

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

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



How does Bury Compare?

Contacts by Outcome | February 2024

	Safeguarding adults	Deprivation of liberty safeguards	Link to existing case	Progress to new case	Resolved at contact - equipment / adaptations / telecare to be provided	Resolved at contact - other	Unknown
Bolton	12.7%	8.0%	25.8%	25.5%	11.7%	16.3%	
Bury	24.3%	2.4%	6.7%	34.2%		27.4%	5.0%
Manchester	12.4%	8.7%	39.0%	17.7%	1.0%	21.2%	
Oldham	10.3%		1.3%	39.6%		48.8%	
Rochdale				37.4%	25.5%	37.1%	
Salford			69.3%			30.7%	
Stockport	11.1%	5.9%	21.8%	24.7%	6.9%	29.5%	
Tameside	23.4%		14.0%	39.1%		23.5%	
Trafford	2.7%	10.7%	44.9%	14.1%		26.2%	1.2%
Wigan	18.0%	9.5%	31.1%	13.9%		27.6%	

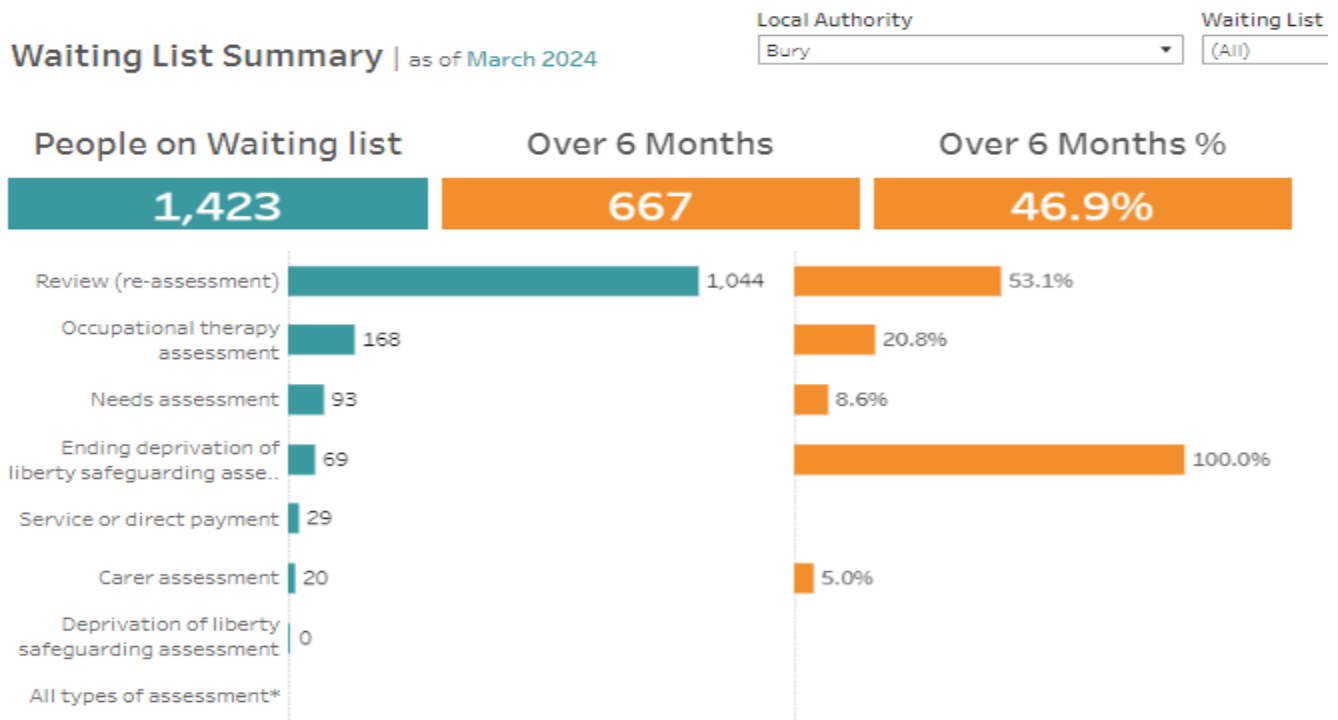
Contacts – commentary

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

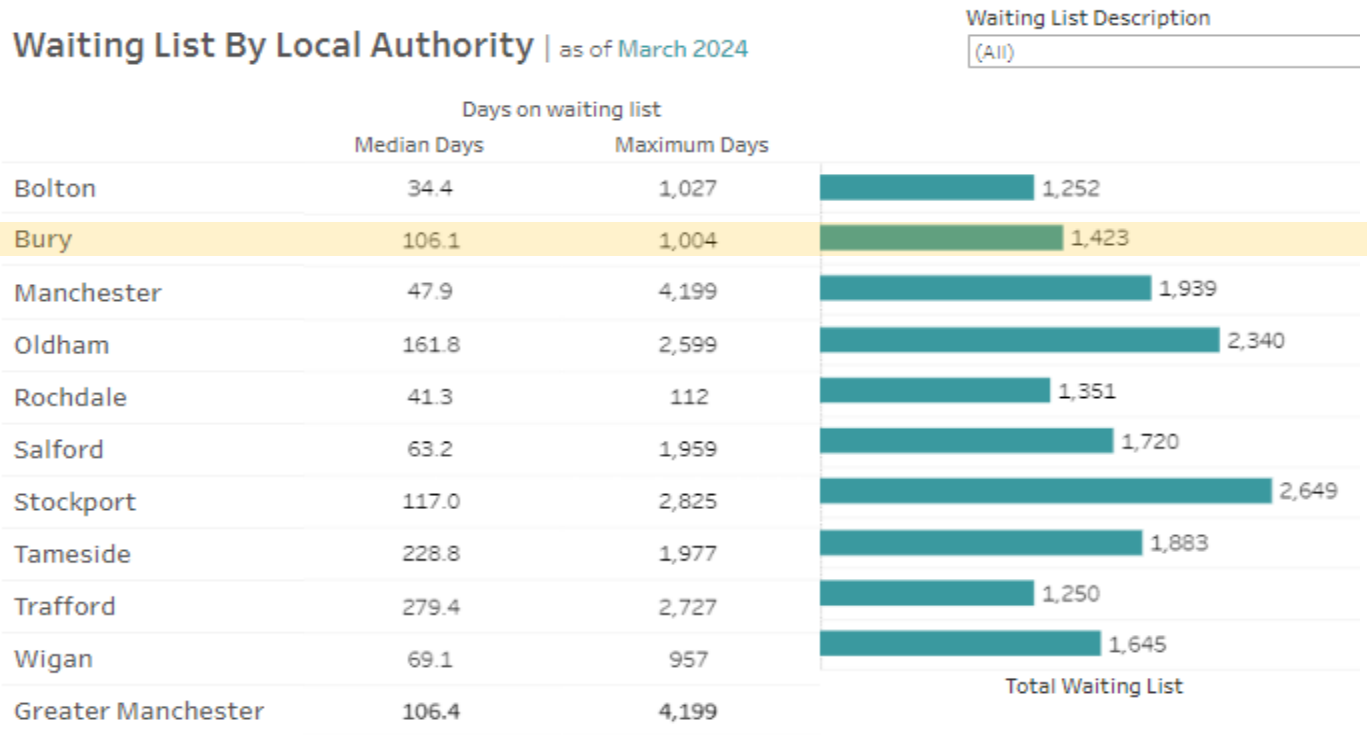
After a larger than normal drop in December January more than made up for it with our busiest month ever. We are pleased to report that March has returned to normal, but this was helped by an early Easter, and services being closed for the easter weekend. Enquiries resolved at first contact remains strong but did drop in February as enquiries that progressed to a new case increased considerably this month.

4.2 Waiting Times for Assessments and Reviews

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



How does Bury Compare?



A closer look at waiting for a needs assessment

There are currently 93 people waiting for assessment by a social worker

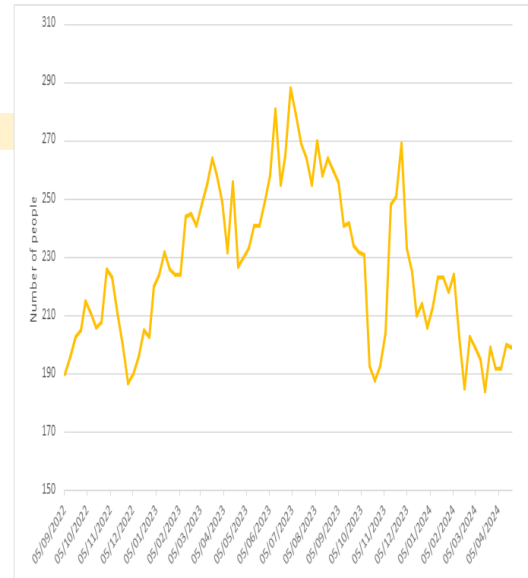
How does Bury Compare?

Waiting List By Local Authority | as of March 2024

Waiting List Description
Needs assessment

	Days on waiting list		Total Waiting List
	Median Days	Maximum Days	
Bolton	17.0	291	80.0
Bury	57.0	424	93.0
Manchester	13.0	2,203	141.0
Oldham	67.0	878	129.0
Rochdale			
Salford	29.0	269	148.0
Stockport	32.0	280	219.0
Tameside	115.6	860	195.0
Trafford	68.0	587	264.0
Wigan	75.0	331	54.0
Greater Manchester	52.7	2,203	

No. of Cases Waiting for Allocation (needs Assessment)



Waiting list - commentary

This shows the number of people waiting for the different types of assessments provided by the department. Where people are waiting for a social worker to be allocated.

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

At the end of the last quarter of 23/24 there has been continued reduction in the numbers of individuals awaiting allocation from earlier in the year. Of note is the reduction in numbers of people awaiting Care Act assessment, this has seen positive impact particularly due work within neighbourhood teams who have managed to reduce the volume through targeted initiatives and caseload monitoring to their lowest awaiting allocation figures. Work continues across social work teams under the governance of the Performance and Quality Board to focus on improving case waiting times to allocation, new mechanisms have been identified through cleansing of data, regular staff supervisions and better data reporting to assist in these endeavours. There are also improved processes for regular review of cases awaiting allocation to support risk mitigation. At the close of 23/24 current awaiting allocation of needs assessment figures sit at 93 from 205 at the same time last year with Bury performing as one of the top 3 Local Authorities in relation to this indicator. Further focus will be given to average times to allocation in the first quarter of 2024.

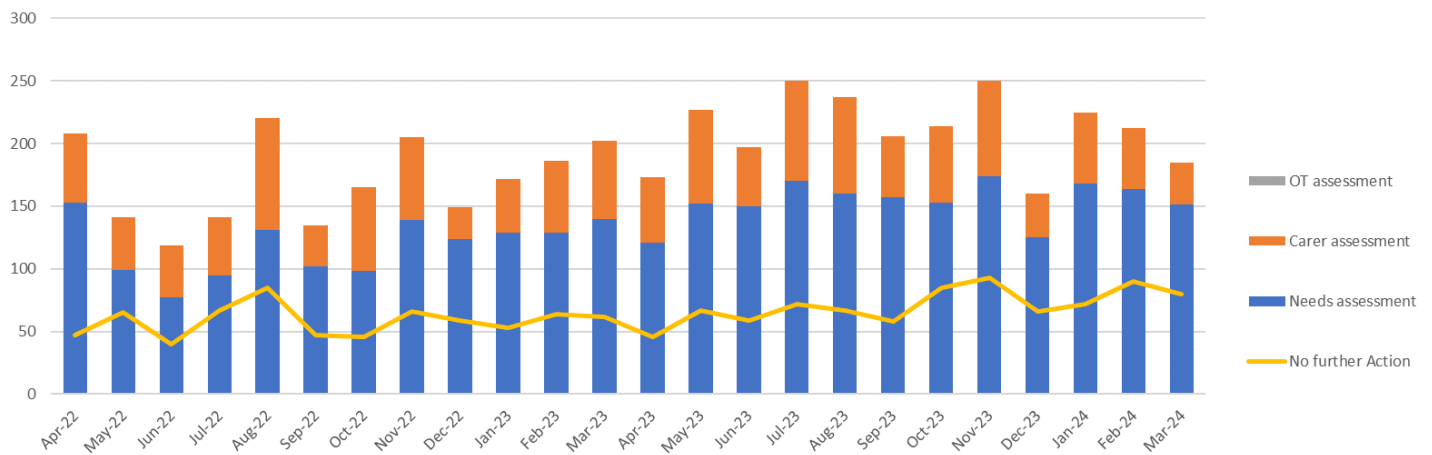
There has also been continued reduction in the numbers of people awaiting reviews with a drop of 229 cases overdue review in this quarter. Following focussed actions identified through governance and assurance boards this remains a priority into 24/25 with targets set for further improvement across Adult Social Care as whole. Following investment in additional posts to expand the Reviewing Team, as a direct response to our current position relating to overdue reviews, it is hoped that an improved position will be noted as we move into 24/25.

Further successful recruitment to Occupational Therapy services is expected to show improvement in allocation once the new post holder takes office in Quarter 1 24/25. It is positive to note that Bury remains the only Adult Social Care department with no waiting list for deprivation of liberty safeguards. Across the service through deep dives in Senior Leadership Team meetings and across internal governance a more robust, data led and evidence-based approach to the management of waiting lists has been adopted in year and will continue across the next financial year.

4.3 Assessments

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

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



How does Bury Compare?

Average number of Days between contact and Assessment



Updated: Mar 24

Assessments - commentary

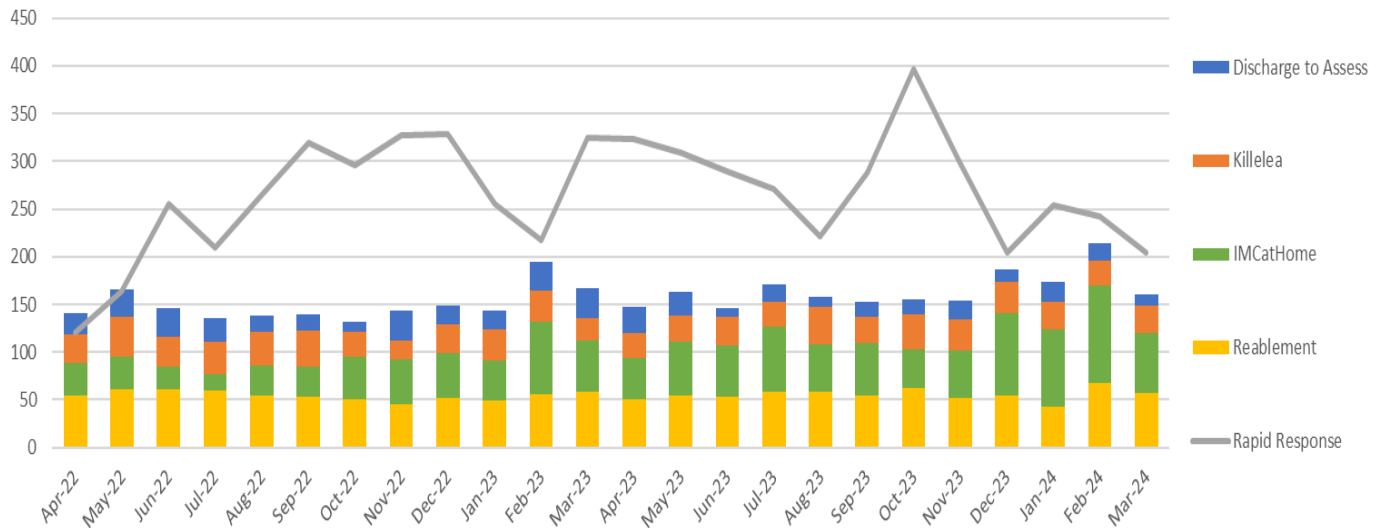
This shows the number of assessments and the type of assessment we complete each month.

It illustrates a growing demand for needs assessments where we have seen an increase of nearly 50% growing from an average of 100 per month to 150 per month. Q4 demonstrates this level of demand holding steady. Despite this extra demand, the time taken to complete an assessment is improving compared to the GM average.

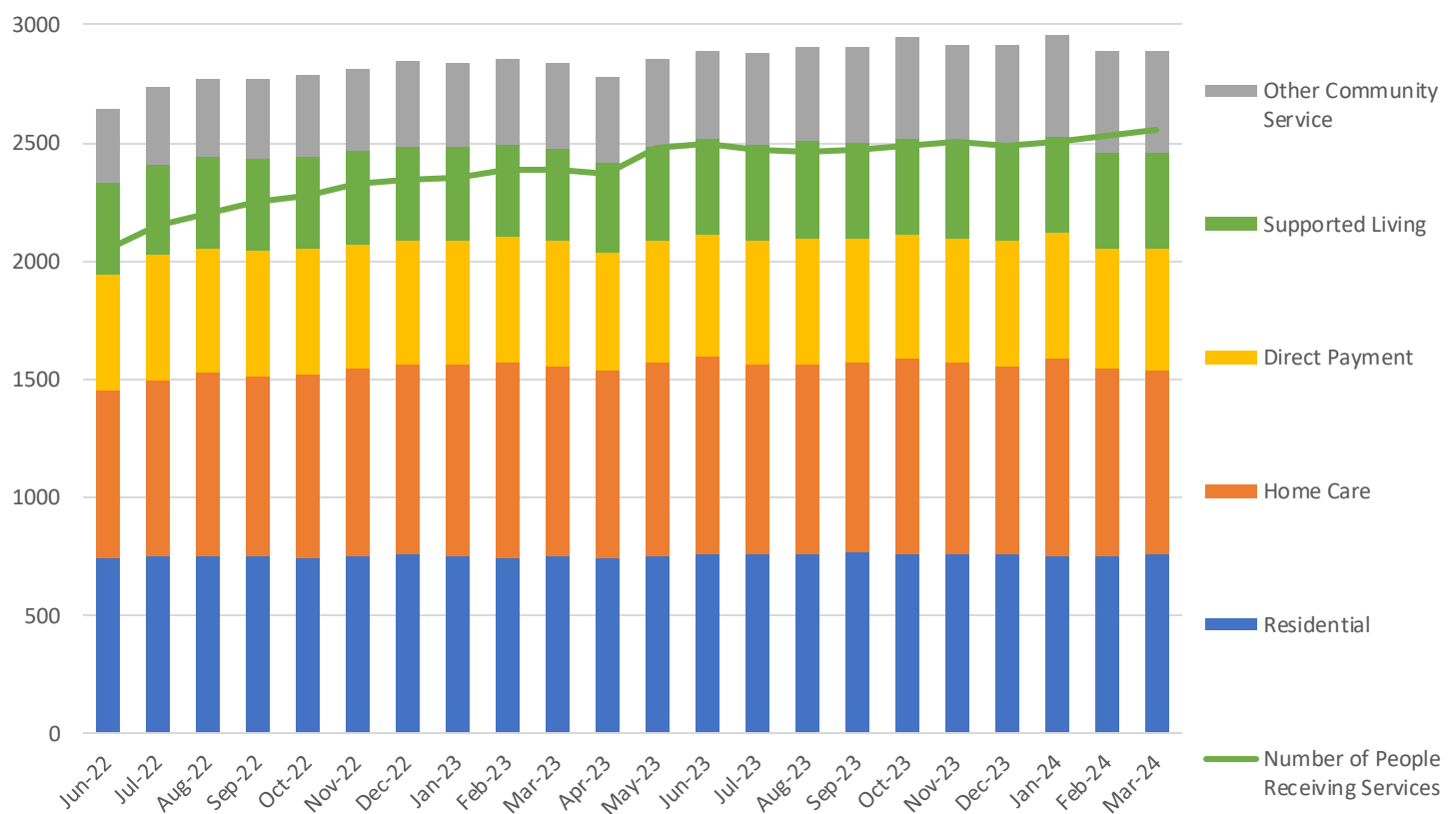
4.4 Services

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

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

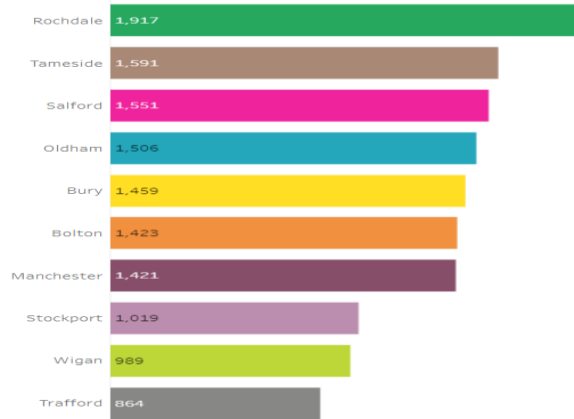


Number of Long-term Adult Social Care services open on the 1st of each month.



How does Bury Compare?

People receiving services per 100,000 population
February 2024 - Long term residential care



Services - commentary

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

The first chart shows the number of people supported in our intermediate care services. These services aim to prevent, reduce and delay the need for long term care and support so the busier they are the better. February was the busiest ever month for these services and shows heightened demand in winter and additional support provided to the hospitals to facilitate timely discharge.

The second chart shows the number we support with long term care services which has grown by nearly 400 or 18% in one year mostly driven by people accessing home care.

In the last 2 months of quarter 4 we saw some of this ever-increasing demand drop off as the number of people using home care fell by 50 people from its peak. Much of this reduction is due to work taking place in our hospital system to maintain patients' abilities whilst admitted and reduce their need for care and support on discharge plus 2 very busy months for our reablement services that saw more people able to benefit from their support and proved itself extremely effective in preventing and reducing the need for care and support.

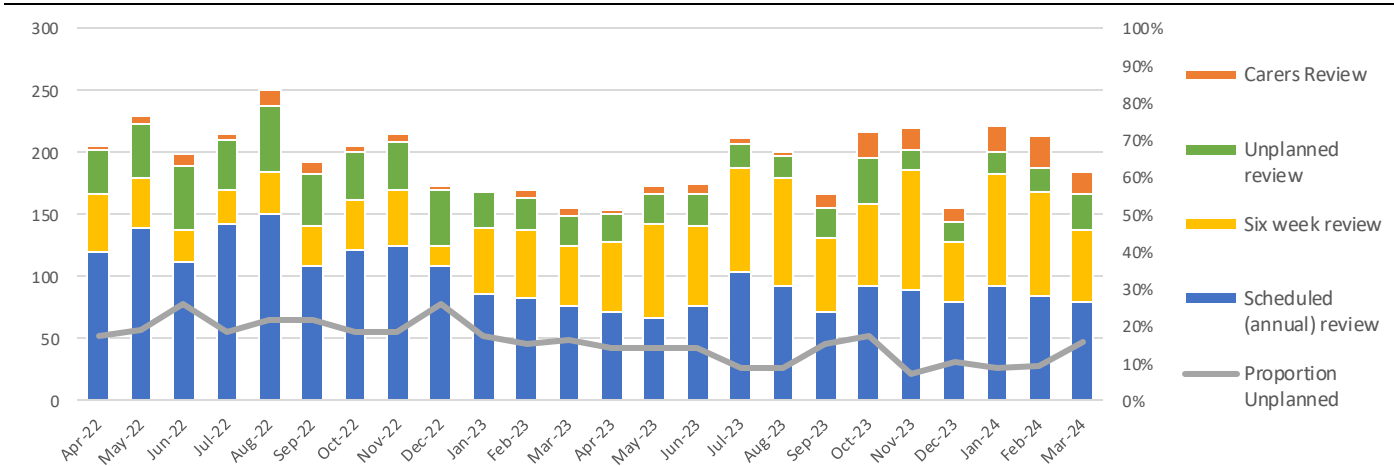
The number of people living in care homes saw a very small increase to 760 and despite increases in opportunities to access rehabilitation continues to grow slowly rise from 746 at the same time a year ago. Whilst disappointing that despite reducing admissions to care homes being an obsession of ours the rate of growth was 1.8% when the growth in that age range in the population is running at 6%

Bury continues to support its population to a very similar level as the other areas of Greater Manchester.

4.5 Reviews

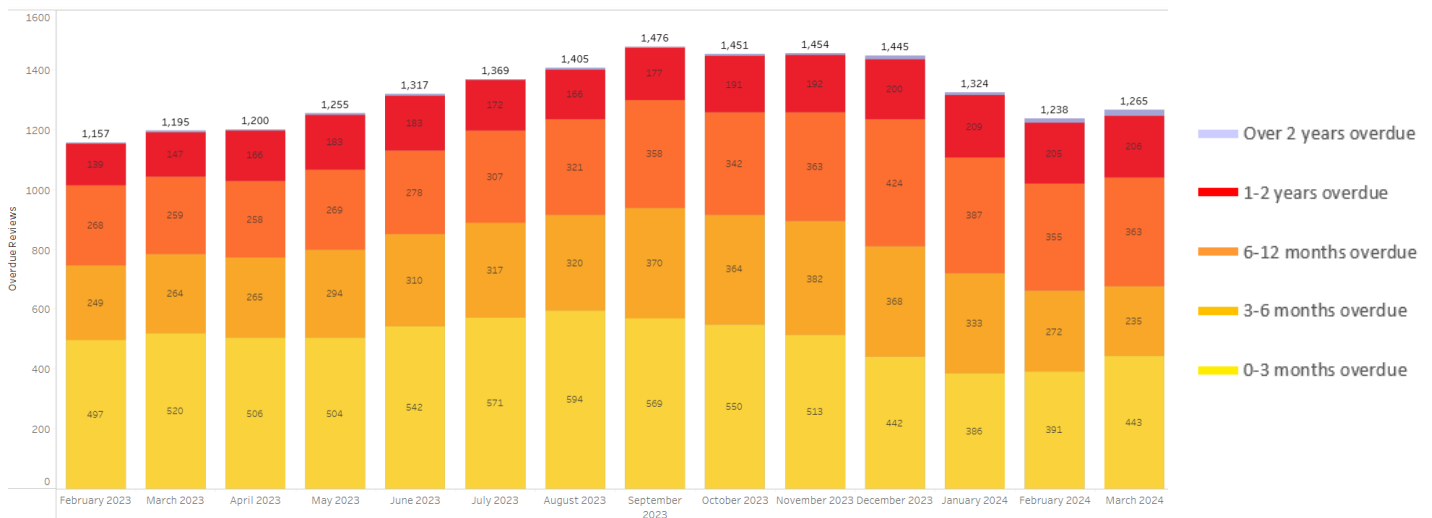
Adult Social Care reviews are a re-assessment of a person’s support needs to make sure that they are getting the right support to meet their needs. Needs may change and new services and technology may give someone more independence and improve their wellbeing. A lower proportion of unplanned reviews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

Number of Adult Social Care Reviews Completed each month.



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

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



How does Bury Compare?

Metric	Bury	Northwest Average	Rank in Northwest (out of 22)
% of service users with a completed annual review	27.1%	55.3%	22 nd
% of service users with a review 2 years overdue	6.2%	11.5%	6 th

Last Updated: Q3 2023/24

Reviews – commentary

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

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

The first two months of 2024 saw 2 successive reductions in the number of overdue reviews; however, this figure of total overdue reviews did increase slightly for March 2024. A reason for the increase is due to natural peaks and troughs within the adult social care system as a large number of recently overdue reviews are reflected in the graph for the reviews 0-3 months overdue. Another reason is due to the impact of winter pressures on the social care system, particularly the adult social care reviewing team. With the acute and intermediate tier services being under increased winter pressures and discharging more patients with care services, which in turn, creates more initial reviews for the reviewing team and impacts on planned annual review activity.

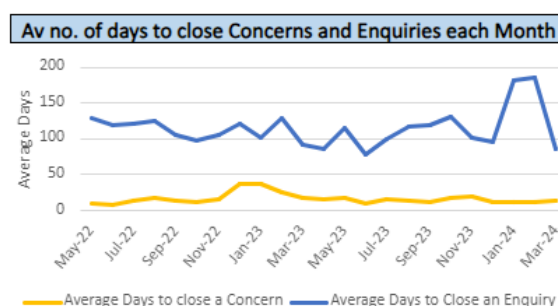
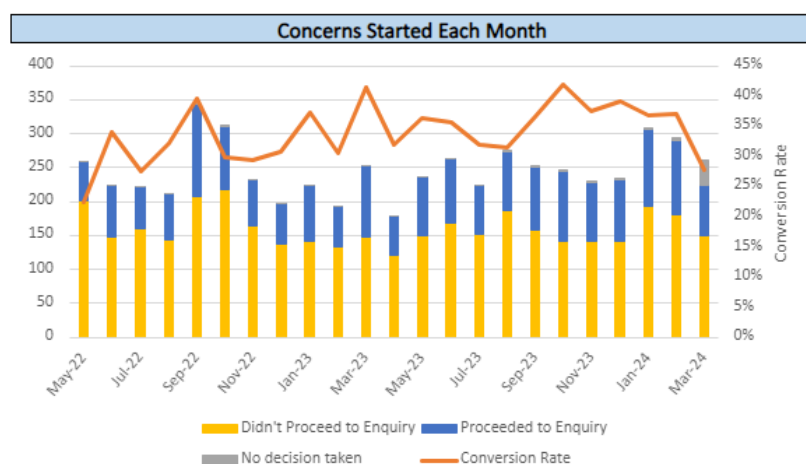
Moving forwards, the planned expansion of the adult social care reviewing team is nearing completion. At time of writing, all but one of the practitioner posts have been successfully recruited to and the induction is underway for those who have recently joined the team as part of this expansion using the Market Sustainability and Improvement Fund grant. An Assistant Team Manager will also join the team in May 2024 which will also improve team performance, so it is expected that overall number of overdue reviews will continue to decrease in coming months.

4.6 Safeguarding

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



Open Safeguarding Enquiries			
	Number	Av. Days	Max Days
ACS Safeguarding Team	176	86	452
Hospital Social Work Team			
Learning Disability Team	3	169	399
OPMHT	2	29	46
Community Mental Health Team			
Strategic Adults Safeguarding Team	16	109	561
Discharge To Assess Heathlands			
Operation Crawton	19	477	651
Total	216	123	651



Active DoLS Requests			
	Urgent	Standard	Total
Waiting for Assessment	1	82	83
Processing	6	13	19
Total	7	95	102

How does Bury Compare? – Still to update

Metric	Bury	Rank in Northwest (out of 22)
Conversion Rate	36%	11 th
Making Safeguarding Personal – Asked	69%	10 th
Making Safeguarding Personal - Outcomes	45%	14 th

Last Updated: Q3 2023/24

Safeguarding - commentary

The data above shows some important trends and an improving picture for Adults Safeguarding in Bury when discussing people’s outcomes which is one of our making safeguarding personal obsessions. Progress in reducing the length of time to complete and enquiry fell back to due to high levels of demand in January and February as resources were diverted to address this new demand rather than closing cases.

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

Deprivation of Liberty Safeguards (DoLS) continues to perform well with no concerns from a supervisory body perspective.

4.7 Complaints and Compliments

Complaints

Period 2023/24	Number of complaints received	Decision			20 working day timescale	
		Upheld	Partially Upheld	Not Upheld	Within	Outside
Q4	18	1	5	6	7	5

- 3 Complaints awaiting consent to progress
- 3 Complaints ongoing

Compliments

Period 2023/24	Source		
	Person receiving or had received services	Relative of person receiving or had received services	Other (incl. various survey responses)
Q4	11	20	186

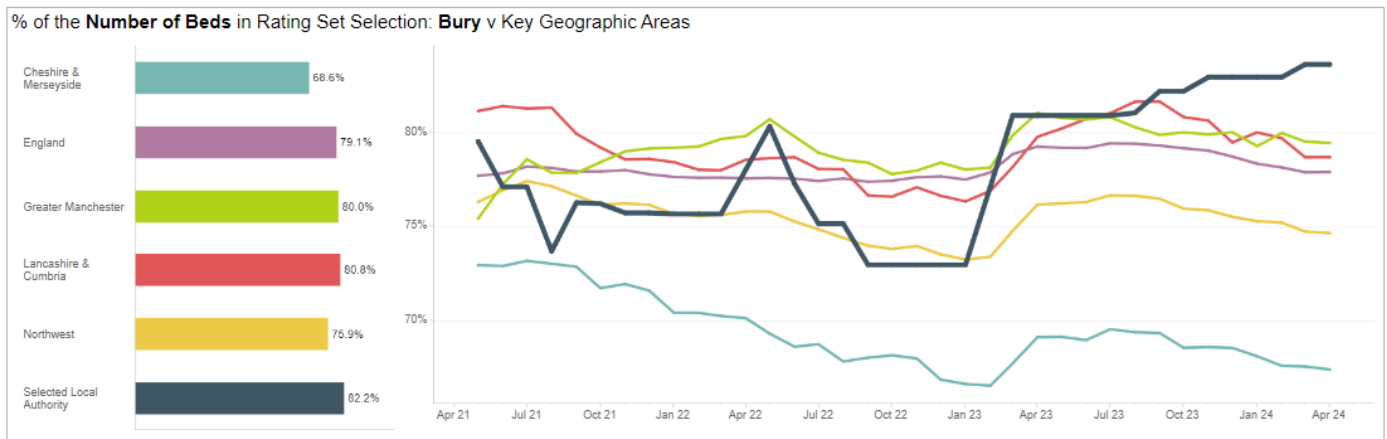
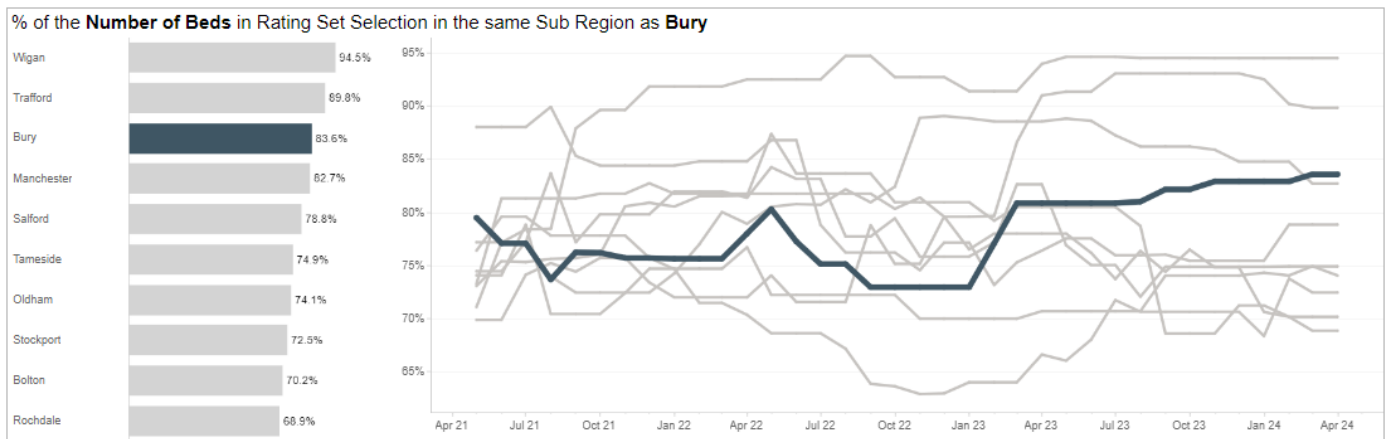
Complaints and Compliments - Commentary

Complaints remain steady and well below last year's levels which indicates learning is being implemented and improvement in services and the previous reason for higher-than-normal levels last year are no longer present.

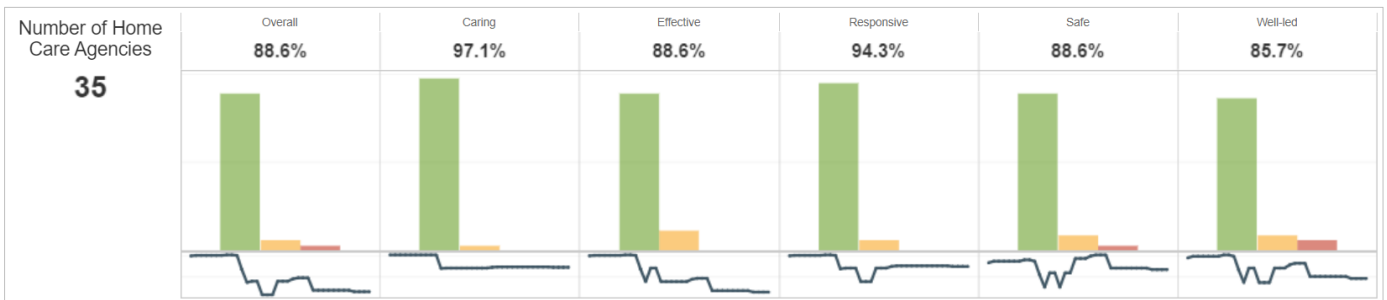
Compliments continues to be high especially for where we provide services directly such as our equipment services and our intermediate care services.

4.8 State of the Care Market

Number of care home beds rated good or outstanding.



Quality Ratings of Bury's Home Care Agencies



Last Updated: Q4 2023/24

State of the Care Market - commentary

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

The overall quality of our care homes continues to increase with Bury now 3rd amongst its GM Neighbours and performing well above the England average and the average of all Northwest regions.

4.9 Adult Social Care data submitted in Q4

These are the ASCOF measure from the adult social care survey submitted on 3rd March 2024

Performance Measures		Sparkline	22/23	23/24	Direction of Travel
ASCS	(1A) Social care-related quality of life		18.8	19.1	✓
	(1B) The proportion of people who use services who have control over their daily life		78.7%	79.6%	✓
	(111) The proportion of people who use services who reported that they had as much social contact as they would like		39.7%	46.2%	✓
	(1J) Adjusted Social care-related quality of life – impact of Adult Social Care services		0.378	0.401	✓
	(3A) Overall satisfaction of people who use service with their care and support		63.2%	63.8%	✓
	(3D1) The proportion of people who use services who find it easy to find information about services		63.6%	65.8%	✓
	(4A) The proportion of people who use services who feel safe		66.4%	72.7%	✓
	(4B) The proportion of people who use services who say that those services have made them feel safe and secure		84.3%	87.2%	✓

Commentary

The adult social care survey completed yearly shows improvement in every question area which is extremely positive. As this survey has only just been published no benchmarking information is available

These are the ASCOF measure from the Carer's Survey submitted on 17th February 2024

Performance Measures		Sparkline	21/22 Data	23/24 Data	Direction of Travel
Carers Survey	(1D) Carer Reported quality of life		6.9	7.3	✓
	(1I2) Proportion of carers who reported that they had as much social contact as they would like		27.9%	26.1%	✗
	(3B) Overall satisfaction of carers with social services		31.6%	33.5%	✓
	(3C) The proportion of carers who report that they have been included or consulted in discussions about the person they care for		63.8%	70.9%	✓
	(3D2) The proportion of carers who find it easy to find information about services		50.7%	60.5%	✓

Commentary

The carers survey is completed every 2 years and has as recently been published. It shows positive improvement in all but one question.

Carers' Survey Negative responses

The carers survey is an in-depth survey that asks for both positive and negative ratings of a number of different aspects of caring. Whereas the overarching performance measures show improvement overall it is always valuable to look at a number of both the negative and positive measures as doing so better informs what actions we need to concentrate on to improve. Red indicates a negative position and green a positive one

Analysis of data from the Carers' Survey, comparing findings from the 23/24 Carers' survey with those from the 21/22 Carers' survey and against the England average for provisional 23/24 data submitted. Questions where data has changed since the last survey or is significantly different from the England average:

1. **Emergency Support Services:** The provision of services allowing carers to stop caring at short notice or in an emergency saw a decrease from **12.3% to 5.4%**, 7.1% lower than the England average.
2. **Personal Assistant Support:** The utilization of personal assistants decreased from **16.3% to 8.4%**, 6.6% lower than the England average.
3. **Home Care/Home Help Services:** The usage of home care or home help services decreased from **26.4% to 20.5%**, 10.1% lower than the England average.
4. **Home Adaptation or Equipment:** Carer access to equipment or home adaptations decreased from **55.5% to 42.3%**, 8.2% lower than the England average.
5. **Personal Safety:** Bury's carers reported feeling safer, with 84.7% feeling no worries about personal safety **increased from 79.3%**, 4.3% higher than the England average.
6. **Financial Difficulty:** 8.8% of Bury's carers report that their caring role has caused them a lot of financial difficulties. A **decrease from 13.2%** in 21/22 and lower than the England average of 10.6%.
7. **Access to Information:** 26.9% of Bury's carers found it fairly or very difficult to access information and advice about support, services, or benefits. **This is a decrease from 31.9%** in 21/22 and slightly lower than the England average of 28.3%.
8. **Employment and Caring:** Carers not being in paid employment due to caring responsibilities has decreased from **21.5% to 13.2%** in 23/24, significantly lower than the England average of 21.7%.

Commentary

This indicates that there is room for improvement in the provision of homecare, equipment and personal assistance to facilitate respite and carers support. These results will be analysed further and strategies to improve included in the refresh of the carers strategy taking place this year.

The survey shows fewer carers and experiencing financial difficulty, more are feeling safer and more are able to continue in paid employment all of which are positive for Bury Carers.

Appendix - Data sources and what good looks like

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



Classification: Open	Decision Type: Key
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Report to:	Cabinet	Date: 05 June 2024
Subject:	Care at Home Review	
Report of	Deputy Leader and Cabinet Member for Health and Wellbeing	

Summary

The Care at Home service supports the vulnerable people of Bury with their assessed needs under the Care Act 2014. This includes support with personal care, moving and handling, nutrition and hydration, and medication. The current service was commissioned in October 2021 for a period of three years with an option to extend by a further period or periods of up to 24 months provided that the total term of the contract does not exceed a total of 5 years.

We currently have eight Lot 1 providers covering the following 'zoned' areas:

- Bury North
- Bury East
- Bury West
- Prestwich
- Whitefield

Lot 1 are the primary providers expected to accept the majority of care packages in their zoned areas.

We also have fifteen Lot 2 providers that are expected to accept care packages when the Lot 1 providers are unable.

Recommendation(s)

Following a service review process, the recommendations are:

- Approve a 12-month contract extension for all Lot 1 Care at Home providers (until 24 October 2025) due to evidence that contractual obligations are being met.
- Approve a 12-month contract extension for Lot 2 Care at Home providers that are meeting contractual obligations (until 24 October 2025).
- Delegate the decision regarding which Lot 2 provider contracts will be extended to the Strategic Leads for Integrated Commissioning.
- Delegate finalisation and sealing of the deeds of extension required to give effect to the contract extensions to the Director of Law and Democratic Services in consultation with the Executive Director of Health and Adult Care.

A decision will be made by mid-July 2024 regarding the Lot 2 providers that will and will not be extended, to allow a 3-month notice period to all.

Reasons for recommendation(s)

A 12-month extension will afford Commissioners the opportunity to complete comprehensive engagement with key stakeholders on a new model for Care at Home. We will research best practice in other local areas, we will run workshops with providers to understand what works well currently and whether there are opportunities to do things differently, and we will engage with residents, not only people who use the service, but also the Bury Older People's Network (BOPN).

In addition, the re-tender will align to the annual fee-setting process in March.

Alternative options considered and rejected

The option not to extend contracts and complete a full re-tender in 2024 was considered, but as described above, sufficient time is required to co-produce a new model.

Report Author and Contact Details:

Name: Stephanie Boyd

Position: Integrated Commissioning Officer

Department: Health and Care

E-mail: s.boyd@bury.gov.uk

Background

The main aim of the Care at Home service is to provide proactive and personalised care within the individual's home and community. This means that the service provider should work in a person-centred way and respond to a person's changing needs to preventing crisis situations from occurring. This should address the person's social-care related quality of life as well as their wider wellbeing (for example housing, social inclusion, and environment) in line with their assessed needs and individual outcomes.

The key principles behind this service include reducing, preventing, and/or delaying the need for further care and support, promoting the statutory principle of individual wellbeing, and introducing positive behavioural change to encourage independence where possible.

The Council spend on Care at Home in 2023/24 was £9,139,875 and there are no additional increased financial implications as the service is already budgeted for in the Care in the Community budget.

Considering the 8.24% fee uplift for year 2024/25, the cost of the 12-month extension will be approximately £9,893,001.

Service Review Process

The table below demonstrates the high-level actions involved in the service review process:

DATE	ACTIONS
February and March 2024	Throughout the months of February and March Commissioners carried out desktop research using current provider performance data submitted to the Council.
26 February to 24 March 2024	Stakeholder engagement included: <ul style="list-style-type: none"> • A feedback form for provider owners and/or managers to complete. • Drop-in sessions for provider owners and/or managers. • A survey for customers (sample of customers randomly selected were contacted directly by Commissioners). • Other stakeholders (including family members, friends, professionals, and/or other interested parties) were welcome to complete the survey.
25 March to 31 March 2024	Analysis of stakeholder engagement.
01 April to 30 April 2024	Report writing and recommendations for Cabinet.
05 June 2024	Decision on next steps made by Cabinet.

Desktop Research Findings

Internal colleagues such as the Community Commissioning Team and the Brokerage Team have highlighted that some providers are very responsive and proactive, and it is necessary to replicate this partnership work with other providers.

Each provider has a dedicated Integrated Commissioning Support Officer who monitors performance and is available to offer advice and support as needed, for example, around quality and safeguarding. A small number of Lot 2 providers are suspended at present, and Commissioners are working to support them with quality improvement where possible.

All eight Lot 1 providers have a good Care Quality Commission rating (CQC) which is part of the contractual requirements. From the fifteen Lot 2 providers the majority have a good CQC rating with two requiring improvement and one rated as inadequate.

Integrated Commissioning Support Officers have highlighted that some providers are not meeting the key performance indicator targets, and this is partly due to the fact that some providers have electronic care monitoring (ECM) systems that are not compliant with the service specification.

Engagement Findings

Provider Feedback

Eight out of twenty-three providers attended the re-established Care at Home Forum Meeting, two providers attended individual feedback sessions, and four providers

completed feedback forms. There was a general feeling that we need to consolidate providers in Bury, develop partnership working, and improve communication.

The following key themes were also apparent:

- **Recruitment and Retention**
This remains a massive challenge in the care sector and the Council is in the process of putting together a workforce support offer for providers.
- **Process for Accepting Packages of Care**
Providers requested a review of the current process for accepting packages of care, for example, having set times during the day for main framework providers to accept packages before they are passed to other providers.
- **Process for Hospital Discharges**
Providers requested a review of and more involvement in the current hospital discharge process which can sometimes lead to a lack of consistency for the customer.

In addition, some providers raised concerns that minute billing is not financially viable for them and that 15-minute visits are an issue as they are not long enough to provide good quality care and the time people need, especially when they are trying to promote independence.

Other issues raised by providers include processes relating to invoices and payments, hospital admissions and deaths, cancelled visits, the suggestion that key performance indicators are too rigid, and a general consensus that we have too many providers.

However, several providers are keen to work in partnership with the Council and are particularly eager to co-produce what a new model might look like, by attending stakeholder workshops and running innovative pilots for new ideas. Some short-term proposals by providers include changes to the process for accepting care packages, changes to the process for hospital discharges, having designated Lot 2 providers for each zone, and increased Technology Enabled Care.

Other Stakeholder Feedback

200 out of 820 Care at Home customers were randomly selected and contacted directly by Commissioners to respond to a short anonymous survey asking them to rate the quality of care they receive from their provider. Other stakeholders (including family members, friends, professionals, and/or other interested parties) were welcome to complete the survey.

The chart below demonstrates that out of the 200 customers we wrote to, 23 completed the survey themselves and 26 family members or friends provided feedback:

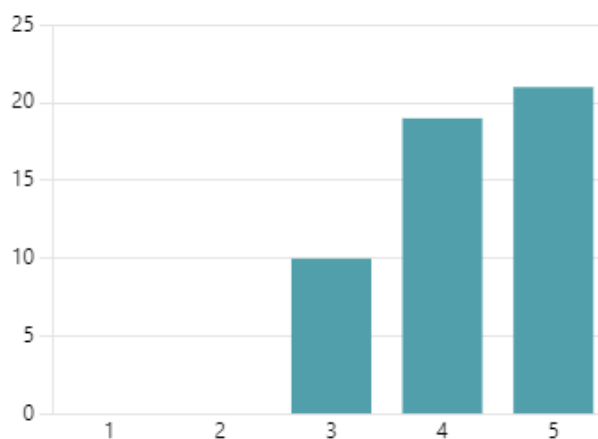
● Customer (person who receives ...	23
● Family member or friend	26
● Paid care at home carer	2
● Other paid professional	2
● Other interested party	0



The average quality rating out of 5 stars was 4.22 across all providers and not one person rated their current provider less than 3 out of 5. The graph below demonstrates that the majority of providers were rated 5 out of 5. However, it must be noted that we cannot apply this average rating to every provider as there were limitations to the survey and some providers did not receive any feedback.

4.22

Average Rating



Some of the feedback was very positive, for example:

“The care, empathy and compassion my husband receives from our care company is always provided in a professional manner and with dignity.”

“Carers very good, can't fault them, lovely people.”

However, some of the feedback highlighted long-term ongoing issues that the Community Commissioning Team continuously work to resolve with providers, for example, lack of continuity with staff and time of calls, the quality of care varies from carer to carer, some carers do not wear a mask when they have a cold, some customers feel rushed, and the issue of loneliness must not be underestimated. The importance of staff uniforms and identification was also emphasised.

Please note that surveys received after the deadline have not been included in the above analysis, but feedback has been considered.

Conclusion of Review

The evidence suggests that the current Care at Home model is working sufficiently and that we have several good quality providers, however, we have too many Lot 2 providers and some are not meeting contractual obligations.

A 12-month extension with providers that are meeting contractual obligations, will afford Commissioners the opportunity to vary the current contract as required, for example, going forward we must stipulate that all providers are to have a Modern-Day-Slavery Policy.

During the 12-month period, Commissioners will work with key-stakeholders to co-produce a well-functioning and sustainable Care at Home service that will have positive outcomes for customers and other areas of health and social care, for example, reduced isolation, reduced admissions to hospital, reduced carer breakdown, and more people being able to live well at home for longer.

We will also re-visit areas for development that were identified previously, for example, moving away from the current rigid 'time and task model' to provide flexibility for both the customer and provider, and improved partnership working with District Nurses, Social Workers, and Reablement Services.

Links with the Corporate Priorities:

In line with the Let's Do It! Strategy, a 12-month extension will enable comprehensive planning to ensure the new Care at Home model supports people to live independently and well at home for as long as possible:

Local: Support people to live independently in their homes and communities for as long as possible.

Enterprise: Opportunities for any capable local suppliers to join the Care at Home provider framework.

Together: Improve health and well-being by working with communities and residents.

Strengths: The promotion of personal resilience and capabilities, and also the current and potential social and community networks, to make sure that people stay connected and independent.

Equality Impact and Considerations:

An EIA has been completed which has highlighted potential impacts across several characteristics. All impacts have been considered and mitigating actions will be put in place to remove these impacts. With mitigations there are no adverse equality impacts.

Please see appendix 1 for Equality Analysis.

Environmental Impact and Considerations:

In line with the Council’s target to be carbon neutral by 2038, a 12-month extension will enable thorough planning to ensure the new Care at Home model is streamlined across the ‘zoned areas’ to ensure unnecessary travel by providers does not take place.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The Council will not be compliant with Procurement rules and legislation.	Advice from legal services confirms that the Council is complying with Procurement rules and legislation.
Contracts will be extended with non-compliant providers.	Extend the contracts of Care at Home providers that are meeting contractual obligations at the Commissioners discretion. Provider performance data submitted to the Council will be used along with softer intelligence from key-stakeholders to ensure good quality service providers.
Non-framework providers are not in scope for the service review. Lack of monitoring for these providers.	Consider the Quality Assurance Framework for these providers.
Some of the good providers may decline a contract extension.	Maintain ongoing engagement with providers via the Care at Home Provider Forums.
Lack of capacity to meet demand should we not extend enough providers.	Commissioners to analyse and manage supply and demand.
Disruption for staff and customers of providers who are not extended.	Commissioners will support a smooth transfer for customers moving to new providers and TUPE may be applicable for some staff. Customers will also have the option for a personal budget to choose their provider or a personal assistant of choice.

Legal Implications:

1. Promoting individual wellbeing and preventing the need for care and support are general statutory duties held by Local Authorities (Sections 1 &2, Care Act 2014). The Local Authority has regard to this in delivering its Care at Home contracts and has regard to the identification and involvement of local services to perform that duty (Section 2(2)(a) Care Act 2014).
2. Each of the contracts between the Council and the providers of the Care at Home service commences on the Commencement Date (25 October 2021) and remains in force for a period of three years until the Expiry Date (24 October 2024). The contracts also provide that no later than three (3) months before the end of the Expiry Date (at the sole discretion of the Council) the Council may extend the term by a further period or periods of up to 24 months each provided that the total term of the contract does not exceed a total of 5 years,

by giving written notice to a provider and stating the required length of such extension, which in this instance would be 12 months.

3. The Care at Home contracts also state that they bestow no form of exclusivity or volume guarantee on any provider and that the Council is at all times entitled to enter into other Contracts and arrangements with other providers for the delivery of any or all services which are the same as or similar to the services to be provided under such contract. Furthermore, in respect of any provider whose performance falls below contractual requirements, the Council may adopt such measures to address this as the contract permits, including suspension and termination of the contract in appropriate circumstances.
4. The Council may therefore determine in its sole discretion, which of the provider contracts it will extend. Contracts which are not extended will expire on 24 October 2024.
5. Each contract extension will be affected by a deed of extension signed and sealed by the Council and the respective provider.

Financial Implications:

There are no additional increased financial implications as the service is already budgeted for in the Care in the Community budget.

Appendices:

Please see appendix 1 for Equality Analysis.

Background papers:

N/A

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

Term	Meaning
Care Quality Commission (CQC)	Independent regulator of health and social care in England.
Electronic Care Monitoring (ECM)	The system used by providers to record care visit information, for example, time of visit.
Bury Older Peoples Network (BOPN)	A mechanism for older Bury residents to have their voices heard on things that matter to them.
TUPE	Transfer of Undertakings (Protection of Employment).

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)

Name of Policy/Project/Decision	Care at Home Review
Lead Officer (SRO or Assistant Director/Director)	Adrian Crook (Director of Adult Social Services and Community Commissioning)
Department/Team	Health and Care
Proposed Implementation Date	N/A
Author of the EqIA	Stephanie Boyd (Integrated Commissioning Officer for Older People and Ageing Well)
Date of the EqIA	29 April 2024

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?

Following a service review process, the recommendations are:

- Approve a 12-month contract extension for all Lot 1 Care at Home providers (until 24 October 2025) due to evidence that contractual obligations are being met.
- Approve a 12-month contract extension for Lot 2 Care at Home providers that are meeting contractual obligations (until 24 October 2025).
- Delegate the decision regarding which Lot 2 provider contracts will be extended to the Strategic Leads for Integrated Commissioning.
- Delegate finalisation and sealing of the deeds of extension required to give effect to the contract extensions to the Director of Law and Democratic Services in consultation with the Executive Director of Health and Adult Care.

A 12-month extension will afford Commissioners the opportunity to complete comprehensive engagement with key stakeholders on a new model for Care at Home. We will research best practice in other local areas, we will run workshops with providers to understand what works well currently and whether there are opportunities to do things differently, and we will engage with residents, not only people who use the service, but also the Bury Older People’s Network.

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: No. The recommendations relate to potential changes for care at home providers and customers.

Community/Residents: Yes.

Third parties such as suppliers, providers, and voluntary organisations: Yes.

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

The Care at Home service supports the vulnerable people of Bury with their assessed needs under the Care Act 2014. This includes support with personal care, moving and handling, nutrition and hydration, and medication. The current service was commissioned in October 2021 for a period of three years with the option for a one or two year extension.

The table below demonstrates the high-level actions involved in the service review process:

DATE	ACTIONS
February and March 2024	Throughout the months of February and March Commissioners carried out desktop research using current provider performance data submitted to the Council.
26 February to 24 March 2024	Stakeholder engagement included: <ul style="list-style-type: none"> • A feedback form for provider owners and/or managers to complete. • Drop-in sessions for provider owners and/or managers. • A survey for customers (sample of customers randomly selected were contacted directly by Commissioners). • Other stakeholders (including family members, friends, professionals, and/or other interested parties) were welcome to complete the survey.
25 March to 31 March 2024	Analysis of stakeholder engagement.
01 April to 30 April 2024	Report writing and recommendations for Cabinet.
05 June 2024	Decision on next steps made by Cabinet.

Advice from legal services confirms that the Council is complying with Procurement rules and legislation.

Data:

Protected Characteristic	Bury Population Data (from the JSNA)	Care at Home Customer Data (from Liquid Logic)
Age	<p>Bury has 114,526 (59.1%) working age adults (18-64 years).</p> <p>There are 35,447 (18.3%) older adults in Bury (65 years and over).</p>	<p>Age 18 to 64 – 183 (22.3%)</p> <p>Age 65 to 74 – 119</p> <p>Age 75 to 84 – 224</p> <p>Age 85 and over – 294</p>

		(77.7%)
Disability	19% of the population report having a disability.	Data unavailable. However, everybody receiving this service has Care Act eligible needs.
Gender Reassignment	The question on gender identity was new for Census 2021. It was a voluntary question only asked of those aged 16 years and over. The question asked, "Is the gender you identify with the same as your sex registered at birth?" with 3 answer options of Yes, No or to write in their gender identity. 94.4% of the population aged 16 years and over in Bury answered Yes.	Data unavailable.
Race	Asian, Asian British or Asian Welsh – 10.6% Black, Black British, Black Welsh, Caribbean or African – 1.9% Mixed or Multiple ethnic groups – 2.6% Other ethnic group – 1.9% White: English, Welsh, Scottish, Northern Irish or British – 78.2% White: Other – 3.5%	African – 3 (0.37%) Any other Asian background – 9 (1.1%) Any other black background – 1 (0.1%) Any other ethnic group – 4 (0.5%) Any other mixed background – 1 (0.1%) Any other white background – 19 (2.3%) Caribbean – 5 (0.6%) English / Welsh / Scottish / Northern Irish / British – 697 (85%) Irish – 8 (1%) Not known – 45 (5.5%) Not stated – 1 (0.1%) Pakistani – 23 (2.8%) White and Asian – 1 (0.1%) White and Black Caribbean – 3 (0.37%)
Religion and Belief	Buddhist - 0.3%	Buddhist – 1 (0.1%)

	<p>Christian – 48.8% Hindu – 0.5% Jewish – 5.5% Muslim – 9.9% Sikh – 0.3% Other religion – 0.3% No religion – 29.4% Not answered – 4.9%</p>	<p>Christian – 381 (46.5%) Jewish – 33 (4%) Muslim – 25 (3%) None – 55 (6.7%) Other – 23 (2.8%) Sikh – 1 (0.1%) Unknown – 301 (36.7%)</p>
Sex	<p>The population of Bury is 51% female and 49% male.</p>	<p>Female – 511 (62.3%) Male – 309 (37.7%)</p>
Sexual Orientation	<p>The question on sexual orientation was new for Census 2021 and was voluntary only asked of those aged 16 years and over: Heterosexual/Straight – 90.6% Gay/Lesbian – 1.6% Bisexual – 1% All other sexual orientations – 0.3% Not answered – 6.5%</p>	<p>Don't know/refused – 66 (8%) Gay/Lesbian – 4 (0.5%) Heterosexual/Straight – 437 (53.3%) Missing – 312 (38%) Other – 1 (0.1%)</p>
Carers	<p>The percentage of people providing unpaid care in Bury is 9.2%.</p>	<p>Informal Carer (without an active carers support plan) – 331 (40.4%) Formal Carer (with an active carers support plan) – 119 (14.5%)</p>
<p>Stakeholder information/consultation: As described in the action log above, a 4-week stakeholder engagement period took place to gain the views of providers, customers, and other stakeholders on the current care at home service.</p> <p><u>Provider Feedback</u></p>		

Several providers engaged with the review process and there was a general feeling that we need to consolidate providers in Bury, develop partnership working, and improve communication. Key themes were apparent such as challenges around recruitment and retention and issues relating to processes. However, several providers are keen to work in partnership with the Council and are particularly eager to co-produce what a new model might look like.

Other Stakeholder Feedback

200 out of 820 Care at Home customers were randomly selected and contacted directly by Commissioners to respond to a short anonymous survey asking them to rate the quality of care they receive from their provider. Other stakeholders (including family members, friends, professionals, and/or other interested parties) were welcome to complete the survey. The average quality rating out of 5 stars was 4.22 across all providers and not one person rated their current provider less than 3 out of 5. However, it must be noted that we cannot apply this average rating to every provider as there were limitations to the survey and some providers did not receive any feedback.

Some of the feedback was very positive. However, some of the feedback highlighted long-term ongoing issues that the Community Commissioning Team continuously work to resolve with providers, for example, lack of continuity with staff and time of calls.

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?
- Could the proposal create barriers to accessing a service or obtaining employment because of a protected characteristic?
- Could the proposal affect the usage or experience of a service because of a protected characteristic?
- Could a protected characteristic be disproportionately advantaged or disadvantaged by the proposal?
- 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)?
- Could the proposal prevent or limit a protected characteristic contributing to the democratic running of the council?

2.4 Characteristic	Potential Impacts	Evidence (from 2.2) to demonstrate this impact	Mitigations to reduce negative impact	Impact level with
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				mitigations Positive, Neutral, Negative
Age	<p>All customers will still receive the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice).</p> <p>Impact with older customers that a change/transition in care team may cause anxiety, confusion, and uncertainty.</p>	As described in the data section above, a disproportionate cohort of older people are more likely to use care at home services.	<p>Clear comms with all customers affected via a letter including e-mail address and phone number for any queries. This will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.</p> <p>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic.</p> <p>Customers will also have the option for a personal budget to choose their provider or a personal assistant of choice, for example, if they have built up a relationship of trust with their provider.</p>	Neutral.
Disability	All customers will still receive	Disproportionate cohort of people with disabilities are	Clear comms with all customers affected via a letter including e-mail	Neutral.

	<p>the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice).</p> <p>Potential impact in lost knowledge of the cared for person and reasonable adjustments in place during a transition to a new care team.</p> <p>Changes in care team may cause some disabled customers anxiety, confusion, and uncertainty.</p>	<p>more likely to use care at home services.</p>	<p>address and phone number for any queries. This will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.</p> <p>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic.</p> <p>Customers will also have the option for a personal budget to choose their provider or a personal assistant of choice, for example, if they have built up a relationship of trust with their provider.</p>	
<p>Gender Reassignment</p>	<p>All customers will still receive</p>	<p>Data unavailable.</p>	<p>Clear comms with all customers affected via a letter including e-mail</p>	<p>Neutral.</p>

	<p>the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice).</p> <p>Transgender customers may have built up a relationship of trust with current care team. There may be some anxiety and uncertainty in protecting trans history and/or disclosing trans history to new care provider teams.</p>		<p>address and phone number for any queries. This will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.</p> <p>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic.</p> <p>Commissioners will work with customers and take a customer led approach to those who have a trans history to manage any transition (this would include or exclude trans history information depending on the persons choice).</p> <p>Customers will also have the option for a personal budget to choose their provider or a personal assistant of choice, for example, a transgender person may have built up a relationship of trust with their</p>	
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			carers and may wish to keep their current provider.	
Marriage and Civil Partnership	No evidence to suggest impact.	N/A	N/A	Neutral.
Pregnancy and Maternity	No evidence to suggest impact.	N/A	N/A	Neutral.
Race	<p>All customers will still receive the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice).</p> <p>Potential Impact around language barriers during transition to new care team provider.</p> <p>Impact in maintaining any cultural arrangements that may be in place with</p>	<p>Whilst there are some variations between Bury population data and Care at Home Customer data there is nothing to suggest a significant disproportionate impact.</p>	<p>Clear comms with all customers affected via a letter including e-mail address and phone number for any queries. This will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.</p> <p>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, to support a protected characteristic (for example, female only carers for cultural reasons).</p> <p>Where required a translation service is accessible to both commissioners and customers to assist in the communication of any transition in care team.</p>	Neutral.

	<p>current care team.</p>		<p>Customers will also have the option for a personal budget to choose their provider or a personal assistant of choice, for example, if they have the same language or cultural needs as their carers, they may wish to keep their current provider.</p>	
<p>Religion and Belief</p>	<p>All customers will still receive the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice).</p> <p>Impact in maintaining any cultural and religious arrangements that may be in place with current care team.</p>	<p>Whilst there are some variations between Bury population data and Care at Home Customer data there is nothing to suggest a significant disproportionate impact.</p>	<p>Clear comms with all customers affected via a letter including e-mail address and phone number for any queries. This will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.</p> <p>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic (for example, female only carers for religious reasons or protected times of day/week for worship/praying).</p>	<p>Neutral.</p>

			<p>Customers will also have the option for a personal budget to choose their provider or a personal assistant of choice, for example, if they have built up a relationship of trust with their provider.</p>	
<p>Sex</p>	<p>All customers will still receive the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice).</p> <p>Potential impact in maintaining gender appropriate care when changing care teams.</p>	<p>Whilst there is a variation between Bury population data and Care at Home Customer data there is nothing to suggest a significant disproportionate impact.</p>	<p>Clear comms with all customers affected via a letter including e-mail address and phone number for any queries. This will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.</p> <p>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic (for example gender appropriate carers where possible).</p> <p>Customers will also have the option for a personal budget to choose their provider or a personal assistant of choice, for example, if</p>	<p>Neutral.</p>

			<p>they have built up a relationship of trust with their provider.</p>	
<p>Sexual Orientation</p>	<p>All customers will still receive the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice).</p> <p>Customers may have built a relationship of trust with their care team around sexual orientation. A change in care team may cause some anxiety or uncertainty around 'coming out' and building trust with a new team.</p>	<p>Whilst there are some variations between Bury population data and Care at Home Customer data there is nothing to suggest a significant disproportionate impact.</p>	<p>Clear comms with all customers affected via a letter including e-mail address and phone number for any queries. This will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.</p> <p>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic.</p> <p>Commissioners will work with customers and take a customer led approach to manage disclosure or non-disclosure of sexual orientation depending on the persons choice.</p> <p>Customers will also have the option for a personal budget to choose their provider or a personal assistant of choice, for example, if</p>	<p>Neutral.</p>

			they have built up a relationship of trust with their carers, particularly around sexual orientation, they may wish to keep their current provider.	
Carers	All customers will still receive the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice).	Disproportionate impact is expected due to the cohort of people who use care at home services.	<p>Clear comms with all customers/carers affected via a letter including e-mail address and phone number for any queries. This will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.</p> <p>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic. Customers will also have the option for a personal budget to choose their provider or a personal assistant of choice, for example, if they have built up a relationship of trust with their provider.</p>	Neutral.
Looked After Children and Care Leavers	No evidence to suggest impact.	N/A	N/A	Neutral.

Socio-economically vulnerable	No evidence to suggest impact.	N/A	N/A	Neutral.
Veterans	No evidence to suggest impact.	N/A	N/A	Neutral.

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

2.5 Characteristics	Action	Action Owner	Completion Date
	No actions identified at this stage.		

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
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Risk Level	No Risk = 0	Low Risk = 1 - 4	Medium Risk = 5 – 7	High Risk = 8 - 16
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3.2 Level of risk identified	Low risk
3.3 Reasons for risk level calculation	<p>A low risk level has been calculated for the following recommendations:</p> <ul style="list-style-type: none"> • Approve a 12-month contract extension for all Lot 1 Care at Home providers (until 24 October 2025) due to evidence that contractual obligations are being met. • Approve a 12-month contract extension for Lot 2 Care at Home providers that are meeting contractual obligations (until 24 October 2025). • Delegate the decision regarding which Lot 2 provider contracts will be extended to the Strategic Leads for Integrated Commissioning. • Delegate finalisation and sealing of the deeds of extension required to give effect to the contract extensions to the Director of Law and Democratic Services in consultation with the Executive Director of Health and Adult Care. <p>The reasons for the low risk level are:</p> <ul style="list-style-type: none"> • Advice from legal services confirms that the Council is complying with Procurement rules and legislation. • All customers will still receive the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice). • Clear comms with all customers/carers affected via a letter including e-mail address and phone number for any queries. This will be checked by the Council’s Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it. • Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic. Customers will also have the option for a personal budget to


	<p>choose their provider or a personal assistant of choice, for example, if they have built up a relationship of trust with their provider.</p> <ul style="list-style-type: none"> • A 12-month extension will afford Commissioners the opportunity to complete comprehensive engagement with key stakeholders on a new model for Care at Home.
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Section 4 - Analysis Decision (Page 11 of the guidance document)

4.1 Analysis Decision	X	Reasons for This Decision
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	Bury Council must follow procurement rules and legislation. All customers will still receive the same level of support, but for some it may be delivered by a different provider. All customers will have a choice and reasonable adjustments will be made to support protected characteristics managed in a sensitive manner. A 12-month extension will afford Commissioners the opportunity to complete comprehensive engagement with key stakeholders on a new model for Care at Home.
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	S.Boyd	22/05/2024	

Responsible Asst. Director/Director		22/05/2024	
EDI	L. Cawley	22/05/2024	

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details



Classification: Open	Decision Type: Non-Key
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Report to:	Cabinet	Date: 05 June 2024
Subject:	Millwood Primary Special School – Programme Update & request for approval to appoint contractor – Part A	
Report of	Deputy Leader and Cabinet Member for Children and Young People	

1.0 Summary

- 1.1 This updated report is presented to Cabinet with a full explanation of the latest position, details of the programme and seeking approval of a fully costed bid from the contractors for the construction of the new wing and authorisation to enter into a Design and Build Contract with them. Along with an approval request for the other client costs stated in Part B of the report.
- 1.2 The contractors have completed the Pre-Construction Services Agreement (PCSA) for the detailed design up to RIBA Stage 4. Their costed bid was received on the 7 May 2024. This is shown in Part B of the report.

Recommendation(s)

Cabinet is asked as follows:

- 1.To approve the fully costed bid from the contractor together with the costs of the professional/consultant/client FFE costs fees for the construction of the new wing. All costs are to be covered by Children’s Services capital funding.
- 2.To authorise the Director of Law and Democratic Services in consultation with the Cabinet Member for Children and Young People to finalise the terms of the Design and Build Contract to be entered into with the contractor.

This report is issued without finalised bid figures from ISG as these will not be available until 31st May 2024. They will then be reviewed internally and validated by independent consultant surveyors Poole Dick. Provided that the final bid figure can be recommended, an amended report will then be issued.

Cabinet approval is needed at the June meeting to ensure a start on site can be made on 1st July 2024 to meet the tight project deadlines. Initial works will be commenced under an agreed time and cost limited Letter of Intent if it is not possible to agree and execute the required JCT Contract by that date

Reasons for recommendation(s)

Development of additional capacity at Millwood Primary Special School, as set out in the Project Safety Valve agreement between the Council and the Department for Education, is a key element of the specialist place sufficiency strategy. Taken together, the Agreement and strategy set out the business case for the development of new provision and expansion of existing specialist provision to meet increasing demand

within Bury and reduce the reliance on placements in Independent Non-Maintained Special Schools (INMSS). The project at Millwood Primary Special School is a priority within this strategy.

Alternative options considered and rejected

Whilst it is possible to re-procure the scheme, this would result in significant delay to delivery of the project with no certainty that costs will be reduced. The option to re-procure will remain, to be pursued in the event that the costed bid is rejected. In that event all the work carried out to date will be utilised to form an integral part of the tender documents to be issued.

Risk Management

The Council has put robust client-side contract management arrangements in place to mitigate risk and ensure effective delivery of the project.

2.0 Background

2.1 Cabinet have received a suite of reports regarding progress/approvals in relation to this scheme.

Below are the dates of the cabinet reports (See below links to the reports): -

- 14 December 2022
- 12 July 2023
- 6 September 2023

2.2 It has only been possible for a report to be submitted at the earliest in June 2024 to Cabinet seeking approval of a fully costed bid from the contractor for the construction of the new wing and authorisation to enter into a Design and Build Contract with them.

2.3 Whilst these timescales are disappointing, the contractor remains confident that the building will be completed for occupation by September 2025 as the anticipated construction period is 53 weeks.

2.4 Development of additional capacity at Millwood Special School, as set out in the Project Safety Valve agreement between the Council and the Department for Education, is a key element of the specialist place sufficiency strategy. Taken together, the Agreement and strategy set out the business case for the development of new provision to meet increasing demand within Bury for specialist provision and reduce the reliance on placements in Independent Non-Maintained Special Schools (INMSS). The project at Millwood is a priority within this strategy.

4th Wing Building Extension Update

2.5 According to the contractors' original programme construction was originally anticipated to commence in February 2024 with a 53-week building period.

- 2.6 During a meeting on 24 October 2023 the contractors indicated that the 4th wing extension programme was delayed. The negotiations with contractors have been complex and time consuming. This was the case when a request to change the proposed car parking layout and landscape area was made. Also, the results of a coal mining site investigation report have resulted in a change to the anticipated foundation design.
- 2.7 The contractors submitted a full Planning application to Bury Council on the 11 October 2023. Planning approval was granted December 2023.
- 2.8 On the 13 November 2023 the contractors submitted their RIBA Stage 3 report. This included a revised programme and updated cost plan. The contractors progressed to RIBA stage 4. The necessary work included RIBA stage 4 technical drawings and specifications and obtaining subcontractor prices for work packages.
- 2.9 On the 12 March 2024 a meeting took place between the contractors and the LA. During this meeting the contractor indicated that there would be a further delay in submitting the stage 4 costed bid, this is mainly due to an issue that whilst carrying out the design of the substructures it became apparent to the contractors that further liaison with the Coal Authority was required for sufficient design information to remediate the potentially existing worked coal seams to further inform the substructure design for raft slab and further substructure remediation to be completed. A formal extension of time for the return of the bid submission was requested in accordance with the PCSA and granted as noon on 7 May 2024.
- 2.10 The stage 4 bid was received on the 7 May 2024 The costed bid and proposals were reviewed. The costed bid was also shared with external quantity surveyors to validate the figures. The company confirmed that the bid represented value for money. Cabinet approval is now required to award the building contract.
- 2.11 An updated programme received from the contractors on the 7 May 2024 states a start on site on 1 July 2024 and completion 4 July 2025. School/LA fit out of the new areas will take place between 7 July 2025 to 18 July 2025 ready for September 2025.
- 2.12 The contractor costs provided are in line with the North-West Construction Hub framework rates and historical costs used by the contractor when successfully awarded contracts via the framework. The council will have total transparency over the next stage in supply chain procurement to ensure we receive true market tested contract costs.

Existing Wings Remedial Works Proposal

- 2.13 On 24 October 2023 a meeting took place between the contractors, the LA and the structural engineers to discuss the contractors roofing remedial proposals for the 3 existing wings at Millwood.

- 2.14 The contractors engaged a SIPS specialist to advise on specific situation repairs to the existing SIPS panels and a Structural Engineer has reviewed the steel /structure. They propose to strip off the existing roofing construction above the SIPs and overlay with a new alternative roof construction on these 3 wings only instead of replacing the SIPS panels with a metal deck roof as is the case in the other areas. Additional steelwork would be introduced to support the roof loads.
- 2.15 The benefits of this option compared to a full replacement of the SIPS are that the works to all 3 wings would be less disruptive to the school as phased decanting of the pupils would not be required during the works.
- 2.16 This proposed approach by the contractors differs from the structural engineer's original recommendation and clearly required robust analysis by the structural engineers prior to any decisions being made.
- 2.17 The contractors carried out further inspections during the February 2024 and Easter half terms. It is hoped that during summer 2024 additional steel props will be installed within various locations in the wings. Following this work the repair work to the 3 wing roofs will take place.
- 2.18 The Contractors along with their designers compiled their finalised proposals/calculations. This information was shared with the LA and structural engineers for approval. These works will have a warranty upon completion.
- 2.19 Additional information and calculations was requested to enable a decision to be made. The structural engineers stated they are satisfied with the proposals with a few items to be confirmed when the works are being undertaken.
- 2.20 Discussions about the revised approach will be required with the schools' senior leadership team and the LA. An understanding of the timescales and impact on school is required. A meeting date to be confirmed.

Roofing Remedial Works Update

- 2.21 The roofing remedial works have progressed well. The hydrotherapy pool, anvil areas, main hall, main kitchens, performance hall are complete.
- 2.22 Phase 5 which includes the re-roofing of the rebound room and the premises team areas are currently being developed by the contractors. Once they have concluded their proposals they will be shared with the school and the LA.

Report Author and Contact Details:

Name: Samantha Horrocks

Position: Asset Manager (Education Services)

Department: C & YP

E-mail: S.J.Horrocks@bury.gov.uk

Links with the Corporate Priorities:

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

- A better future for the children of the borough
- A better quality of life
- A chance to feel more part of the borough
- Building a fairer society that leaves no-one behind

Equality Impact and Considerations:

An Equality Impact Assessment has been completed with neutral and positive impacts identified. No further mitigations/actions are required.

Environmental Impact and Considerations:

Environmental impacts and concerns will be considered as part of the pre-construction services and will be in-line with existing Council policies.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The Council making a direct contract award to the contractors will not represent value for money.	Monitoring has taken place during the RIBA stage 4–Technical Design stage to assess value for money in the context of the emerging detail of the content of the contractors bid. This will provide the Council with the necessary assurance that it is safe to make the direct award to the contractor or alternatively to determine that the project should be re-tendered. Commissioned an external Quantity Surveyor company to provide assurances to the council that the bid represents value for money. The Council has put robust client-side contract management arrangements in place to mitigate risk and ensure effective delivery of the project

Legal Implications:

The proposed contract with the contractor if approved will be a direct award under the North-West Construction Hub (NWCH) framework. A direct award is appropriate in the exceptional circumstances of this matter. However, the Council has to be satisfied that its best value statutory obligations under the Local Government Act

1999 have been met. To that end the Council has received confirmation that the costs are in line with the NWCH framework rates, has been given transparency as to the contractor's supply chain costs and the overall tender sum has been validated by independent quantity surveyors.

A general duty exists to ensure sufficient school places for children of mandatory age in the area (S14 EA 1996). The proposed extension to Millwood Primary Special School which is in Borough supports this and the agreement made under Project Safety Valve. The Special Educational Needs and Disabilities Code of Practice (January 2015) confirms that a Council's local offer must include available local service provision arising from the Joint Strategic Needs Assessment.

Financial Implications:

There is provision for the works within the Capital Programme approved by Council in February 2024.

Appendices:

Equality Impact Assessment

Background papers:

Cabinet Report – 14 December 2022 – Millwood Primary Special School: Update on remediation Programme and expansion proposal. [Link](#)

Cabinet Report – 12 July 2023 – Children's Services Capital Programme [Link](#)

Cabinet Report – 6 September 2023 – Millwood Primary Special School -request to approve additional expenditure - [Link](#)

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

Term	Meaning
RIBA	Royal Institute of British Architects

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)

Name of Policy/Project/Decision	Millwood Primary Special School – Request for approval to appoint contractor
Lead Officer (SRO or Assistant Director/Director)	Jeanette Richards
Department/Team	Children’s Services
Proposed Implementation Date	5.6.2024-Cabinet Date
Author of the EqlA	Samantha Horrocks
Date of the EqlA	20.5.2024

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?

Millwood Primary Special School is a school catering for 160 primary aged (4-11) pupils with a range of additional educational needs and disabilities.

The proposal is to extend the school building in order to provide capacity to accommodate an additional 50 children.

The report to Cabinet on the 5th June 2024 is to seek approval to the appointment of a contractor to undertake this work.

Detailed designs for an extension of the school building have been developed by a design team working closely with the school leadership team and the school community. Those designs have then been subject to statutory consultation as part of the planning process.

The purpose of the extended capacity is to ensure that children and young people with a range of special educational needs and disabilities have access to high quality educational provision, in accommodation purposefully designed to meet their needs. The additional capacity will enable a greater number of children and young people to access specialist provision in a local setting, many of whom would otherwise have to travel significant distances to access such provision outside of Bury.

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**

Community/Residents: **Yes**

Third parties such as suppliers, providers and voluntary organisations: **No – the additional accommodation is primarily for use by school pupils, and so the impact will be on pupils on roll at the school, and the staff employed in the school.**

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

The design team has developed the scheme through each of the RIBA stages, with each stage developing the level of detail following client/service user engagement.

The scheme now presented for approval has been developed to RIBA stage 4 which brings together the detail of the scheme, a programme for its implementation, and detailed costs. These are the culmination of the design process that has looked in detail at the needs of the children and young people attending the school, and those who will attend in the future.

The design process has had regard to the complex needs displayed by many of the children and young people.

Data:

The school currently caters for 160 pupils with a range of additional educational needs and disabilities. The scheme will provide additional accommodation to serve a further 50 children and young people.

The increase in capacity responds to the Specialist Sufficiency Strategy that recognises the increasing demands within the local population for special school places.

This scheme sits alongside other projects which include the provision of three new Special schools, and also additional Resourced Provision units linked to mainstream schools. All of this is designed to ensure a continuum of high quality provision to meet the needs of the local population.

Stakeholder information/consultation:

The scheme at Millwood Special School forms part of a wider Specialist Sufficiency Strategy that has been the subject of extensive consultation with a wide range of stakeholders.

The strategy forms part of the PSV management plan which is overseen by the PSV Board which brings together key stakeholders.

More specifically, in respect of Millwood, the input of the school leadership team and the wider school community has been an essential part of the process to inform design and delivery of the project and to ensure that the proposed building responds to the needs of its pupils.

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? No
- Could the proposal affect the usage or experience of a service because of a protected characteristic? No
- Could a protected characteristic be disproportionately advantaged or disadvantaged by the proposal? No
- Could the proposal make it more or less likely that a protected characteristic will be at risk of harassment or victimisation? No
- Could the proposal affect public attitudes towards a protected characteristic (e.g. by increasing or reducing their presence in the community)? No
- 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
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Age	There is no change to the age range of the school.	N/A	N/A	Neutral
Disability	Accessibility to the building to facilities, and to learning	Scheme design	During the design development of the extension scheme there has been a focus on accessibility and ensuring the space is welcoming and accessible to all.	Positive
Gender Reassignment	There is no change that will impact	N/A	N/A	Neutral
Marriage and Civil Partnership	There is no change that will impact	N/A	N/A	Neutral
Race	There is no change that will impact	N/A	N/A	Neutral
Religion and Belief	There is no change that will impact	N/A	N/A	Neutral
Sex	There is no change that will impact	N/A	N/A	Neutral
Sexual Orientation	There is no change that will impact	N/A	N/A	Neutral

Carers	There is no change that will impact	N/A	N/A	Neutral
Looked After Children and Care Leavers	There is no change that will impact	N/A	N/A	Neutral
Socio-economically vulnerable	There is no change that will impact	N/A	N/A	Neutral
Veterans	There is no change that will impact	N/A	N/A	Neutral

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

2.5 Characteristics	Action	Action Owner	Completion Date
N/A			

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
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3.2 Level of risk identified	
3.3 Reasons for risk level calculation	<p>Low Risk-0 No risk as positive amendments have been made during the design stage of the build scheme.</p>

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

4.1 Analysis Decision	X	Reasons for This Decision
There is no negative impact therefore the activity will proceed	X	There are no negative impacts from the activity
There are low impacts or risks identified which can be mitigated or managed to reduce the risks and activity will proceed		
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		
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Section 5 – Sign Off and Revisions (Page 11 of the guidance document)

5.1 Sign Off	Name	Date	Comments
Lead Officer/SRO/Project Manager	Paul Cooke	21/05/24	
Responsible Asst. Director/Director	Stephen Holden	21/05/24	
EDI	L. Cawley	21/05/24	

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details

Classification: Open	Decision Type: Key
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Report to:	Cabinet	Date: 05 June 2024
Subject:	PRU-Phase 2-Whitefield Centre-request approval to invite tenders for work in relation to the Pupil Referral Unit – Part A	
Report of	Deputy Leader and Cabinet Member for Children and Young People	

Summary

- 1.1 The purpose of this report is to request Cabinet approval to invite tenders for work in relation to the Pupil Referral Unit, and specifically in relation to the PRU's Whitefield Centre building. These are phase 2 of works following the relocation of the main PRU building from Spring Lane to the New Kershaw Centre. Approval is required to proceed to tender to obtain a competitive construction price. An indicative plan and programme are appended to Part B of this paper. These will inform the design, tender process and delivery of the works to completion.
- 1.2 Given the speciality of the works, an informal benchmarking exercise has been undertaken in advance of a formal tender exercise, to help inform an appropriate budget for the works. On approval by cabinet to proceed with the Whitefield Centre project, the works will be fully market tested and independently verified via a formal tender process.
- 1.3 The Whitefield Centre works are in addition to the phase 1 works, which was given Cabinet Approval in December 2023.
- 1.4 The Whitefield Centre works will be funded from the Children's Services Capital Programme, using grant funding allocated by the Department for Education.

Recommendation(s)

It is recommended that Cabinet:

- 2.1 Acceptance of the indicative budget and works programme (included in Part B of this document), and approval for the Whitefield Centre works to proceed to formal tender, using a pre-procured ESPO Framework, and subject to additional cabinet approval of the final contract sum prior to award and entering into contract with the preferred supplier/ contractor.

Reasons for recommendation(s)

- 3.1 Approval of the works is required in order for the Whitefield Centre project to progress to tender phase. Key considerations within this document have informed both the scope and the methodology for carrying out the works as proposed.

Alternative options considered and rejected

- 4.1 **Delay instructing the contract:** This would delay overall Whitefield Centre completion date by two months as Cabinet approval cannot be sourced in the August cycle. This would prevent the school from receiving the additional intake of pupils in and they would have to be housed in alternative provision outside the Borough of Bury.

This would also push the works into the winter months, potentially extending the duration on site and associated costs of construction.

- 4.2 **Seek an alternative solution for the contract:** The Council have considered alternative options to deliver the additional accommodation within the timescales provided. This included use of other Council owned property, and the use of modular accommodation on the existing site, partial refiguration only. No other Council owned property could meet the needs of the school within the available timescale. Partial reconfiguration would not provide the classroom accommodation the school requires and there was insufficient space within the school to site modular accommodation or extend. A split site was also discounted as the school would not have the staffing and safeguarding arrangement available to accommodate this. None of alternative options explored were able to deliver the additional accommodation with the available timescales.

Report Author and Contact Details:

Name: Samantha Horrocks/Ian D'Arcy (BGI)

Position: Asset Manager

Department: Children's Services

E-mail: S.J.Horrocks@bury.gov.uk

Background

- 5.1 In December 2023 cabinet approved the relocation of Spring Lane School to the New Kershaw Centre (NKC). This was to enable the construction of the new secondary school to proceed, to be sited on land off Spring Lane, Radcliffe.
- 5.2 The relocation of Spring Lane School to New Kershaw Centre (phase 1) was required before the 1st March 2024 in order to provide DfE with vacant possession of the site. This date was achieved with the PRU relocating at the end of February 2024.
- 5.3 Alongside this, one of the PRU's other buildings, Milltown House has had to be taken out of use because of its condition. The loss of the PRU, and limitations to the scope of accommodation available at the New Kershaw Centre has resulted in a shortfall of accommodation available to the PRU, particularly in respect of the delivery of vocational subjects.
- 5.4 The local authority has worked with the leadership team of Spring Lane school, and the Oak Leaning Partnership which is the proposed sponsor of Spring Lane School, to determine the immediate requirements for accommodation, but also to develop a longer-term estate strategy recognising the changing demands on provision, and the existing fragmented nature of the PRU estate, operating out of four buildings.

Options Appraisal

- 5.5 As part of the long-term strategic approach, there is an urgent requirement to carry an Options Appraisal of the long-term accommodation needs of the existing PRU. The Options Appraisal will evaluate of a number chosen options to establish the most appropriate option.

- 5.6 Each option to be evaluated against set parameters to be agreed, e.g. affordability, programme, viability, and alignment with the long-term strategic approach. The option appraisal will include an assessment of each of the suitable identified sites, accommodation requirements, design (massing and areas), affordability and delivery programme.
- 5.7 The Options Appraisal will focus on four main options for further assessment during the options appraisal, these are detailed as follows:
1. **Construction of a new purpose built PRU** - Identification of a suitable council owned vacant site and construction of a new purpose built PRU, which will accommodate the full proposed intake of pupils across the borough currently 140 pupils. The existing sites, Whitefield Centre, New Kershaw Centre, Park House, and Milltown House are then proposed to be sold off to contribute towards the capital outlay.
 2. **Redevelop an existing council owned building** - Identification and redevelopment of a suitable existing council owned building (ideally an old school building), which can accommodate the full proposed intake of pupils across the borough currently 140. The existing sites, Whitefield Centre, New Kershaw Centre, Park House, and Milltown House are proposed to be sold off to contribute towards the capital outlay.
 3. **Undertake additional redevelopment/ Upgrade of the existing accommodation** - Following the relocation of the PRU from the Spring Lane Site to the New Kershaw Centre, Park House, and The Whitefield Centre (Phase 1), additional works are proposed to be undertaken to the New Kershaw Centre, Park House, and The Whitefield Centre, to further improve the existing facilities and expand the existing accommodation to enable an additional intake of pupils.
 4. **Do Nothing/ Status Quo** – Following the relocation of the PRU from the Spring Lane Site to the New Kershaw Centre, Park House, and The Whitefield Centre (Phase 1), no further are to be carried out and the buildings remaining as per the phase 1 refurbishment.

Phase 2 Works

- 5.8 Phase 2 is now required, to further expand/ enhance the current provision at the New Kershaw Centre and the Whitefield Centre following the relocation from Spring Lane.
- 5.9 Phase 2 is necessary, as facilities that were available in the Spring Lane building cannot be replicated in any of the schools four buildings.
- 5.10 The Phase 2 works which are the subject of this report are for the provision of additional vocational teaching spaces. Initially, the focus was on the possible internal reconfiguration of the PRU's existing building in Whitefield. However, time constraints, requiring the accommodation to be available from the autumn term, resulted in other options also being considered.

Note: The budget is based on an approximate internal floor area of 700m² for the whole school.

Options		Feedback
1	<p>Full refurbishment of the school as per the requested design from the school</p> <p>Remodelling of the existing teaching space and converting the sports hall to classrooms - as per the plans received from PRU</p> <p>(OPTION NOT PURSUED)</p>	<p>Involves altering most of the school in some capacity. Would have to be carried out whilst the school is live. Unlikely we can finish before April 2025, particularly as we will be working whilst the school is live, and work will take longer and be more expensive. Will also require a lot of design and planning time.</p>
2	<p>Partial refurbishment part of the school (Sports Hall Only)</p> <p>(OPTION NOT PURSUED)</p>	<p>Unlikely that we will get the school to prioritise areas over others. This is unlikely to work as this won't cover everything the school need. Will likely require a lot of planning and design to get right.</p>
3	<p>Full refurbishment of the school with a revised design</p> <p>Remodelling the sports hall to accommodate additional classrooms, with minor reconfiguration of the existing space to meet the accommodation schedule</p> <p>(OPTION NOT PURSUED)</p>	<p>An alternative design could reap benefits by arranging the spaces more efficiently to minimise the number of areas that are refurbished. The M&E is in good condition and the fabric is ok, so there could be savings. Will require sufficient design time up front to get right and satisfy the school's needs. Unlikely this can be finished before February 2025.</p>
4	<p>Installation of modular classrooms on the Whitefield site to provide extra space (3 classrooms)</p> <p>(OPTION NOT PURSUED)</p>	<p>Could work, but unsure what classrooms would be catered for, would still need the main school to be refurbed to some degree, which we don't have time.</p>
5	<p>Relocate the school to an alternative council owned building</p> <p>(OPTION NOT PURSUED)</p>	<p>We don't believe there is another site they can move to, plus time and cost would be too restrictive. Would need similar scope and cost as NKC (Phase 1)</p>
6	<p>Relocate the whole school to another site, into modular accommodation.</p>	<p>This is the only viable option, Whittaker Street has been identified as a good option, as this is available from 4th</p>

		August. If we move quick, we could just about get something in for the end of 2024, but needs some design input up front.
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- 5.11 The provision of temporary modular accommodation for the whole school positioned at Whittaker Street, Radcliffe (**Option 6**) was found to be the only option that could deliver the accommodation that the school require within the timescales we have available.
- 5.12 The relocation of the Pupil Referral Unit is not subject to any statutory change as would be required by School Organisation Regulations, and as such does not require formal consultation in respect of its change of location. However, it is proposed that informal consultation take place with key stakeholders including pupils and their families.

Existing and Proposed Site

Existing Site - Whitefield Centre, Albert Road, Whitefield

- 5.13 The existing site is a single storey, 1970’s style prefabricated primary school building with, with flat roof, fully glazed/ panelled façade, attached sport hall and car parking. This building was converted in the past into a pupil referral unit, which currently accommodates approximately 42 pupils. The building fabric and services are in reasonable condition for its age, although internal arrangement is not currently fit for purpose and requires substantial reconfiguration to improve facilities for the pupils and staff.
- 5.14 There is currently very little space within the site boundary to further extend building or has space to site temporary modular accommodation, whilst any reconfiguration works was to be undertaken. Therefore, any works would substantially disrupt the school.

Proposed Site – vacant Bury Council Site, Whittaker Street, Radcliffe

- 5.15 The proposed site is on the land which has an old red brick, three storey, vacant council building/ old school, with large car park/ playground, which temporary modular accommodation could be sited for the Whitefield Centre, without affecting the running of the school whilst this installation is undertaken.
- 5.16 The Whittaker Street building is due to be demolished in August 2024 and the land is included in the accelerated land disposal programme.

Programme

- 5.17 We have developed a detailed programme of works, which can be found in the Appendix of Part B of this paper. It is our intention to tender the works as soon as possible via a pre-procured framework and place an order for Manufacture soon after. Due to the nature of the PRU, the modular units will need to have a specific design and made to order. The manufacturer period is likely to take anywhere between 12-16 weeks, dependant of the availability with their factory.

Procurement Process

- 5.19 Technical capacity in the form of a Project Manager (Walker Sime) were commissioned by Business, Growth and Investment (BGI) via the pre-procured Constellia Framework, to support the delivery of the Children's Services capital programme. Walker Sime were able to assist Children's service in the delivery of phase 1 and bring experience of the existing sites, the school leadership team and Bury Council processes, and have worked closely with Bury Council team in various roles since February 2023.
- 5.20 Architectural, Mechanical and Electrical, and Structural Engineer resources were commissioned through formal request for quotations using approval suppliers, aligned with the Council's Contract Rules and Procedures.
- 5.21 The construction works will be procured via the pre-procured Espo Framework, specifically for modular building providers and will be aligned with the Council's Contract Rule and Procedures.
- 5.22 The project will be overseen by BGI officers and will report to the Council's Regeneration Board for project assurance/oversight.

Links with the Corporate Priorities:

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

- A better future for the children of the borough
- A better quality of life
- A chance to feel more part of the borough
- Building a fairer society that leaves no-one behind

Equality Impact and Considerations:

An Equality Impact Assessment has been completed, with no negative impacts identified therefore no mitigating actions are required.

Environmental Impact and Considerations:

Environmental impacts and concerns will be considered as part of the pre-construction services and will be in-line with existing Council policies.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Significant risks in ensuring the decant of existing services from the Whitefield Centre within a short timescale.	Appointment of Project Manager
Significant risks in delivering the required accommodation and designs for the Whitefield Centre to provide improved/ increased accommodation for the school by November 2024.	Establishment of project team to help develop a project plan and design.
Financial risk in relation to affordability of the project prior to obtaining competitive price.	Undertake informal benchmarking exercise of pricing to inform the project budget.
Risk on not achieving the relocation of Whitefield Centre by 29th November 2024.	Project and risk plan prepared by project manager

Legal Implications:

The procurement process for the modular buildings will be undertaken via a pre-secured ESPO framework which is fully compliant with the Public Contract Regulations 2015. Contractors accepted onto the framework have already been subject to quality and price competition. The use of this framework will determine the form of call-off contract which the Council will enter into with the successful contractor.

Financial Implications

There is provision for these works within the Capital programme approved by Council in February 2024. These works can be treated as capital works under IFRS 16.

Appendices:

Appendix 1 - Equality Impact Assessment

Background papers:

Cabinet Report – 13 December 2023 – [Cabinet report - relocation of Spring Lane School to New Kershaw Centre.docx](#)

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

Term	Meaning
NKC	New Kershaw Centre – Pupil Referral Unit, Deal Street, Bury
PRU	Pupil Referral Unit - type of school that caters for children who aren't able to attend a mainstream school. Pupils are often referred there if they need greater care and support than their school can provide.
Initial Designs	High level design produced in concept form that required further development and agreement.
ESPO Framework	Procurement mechanism to use tender works to a list of contractors who have already been reviewed and pre-qualified in terms of capability and experience. Allows the tender process to be quicker.
Options Appraisal	Evaluation of a number chosen options to establish the most appropriate option to proceed with. Each option to be evaluated against set parameters to be agreed, e.g. affordability, programme, viability and alignment with the long term strategic approach.
Market Testing/ Tender	An approach to seek multiple prices from suppliers/ contractors to undertake works, for comparison, appraisal and ensure best value for money.
Reconfiguration Works	The approach of making structural and fabric alterations to a particular space to change its size, use or orientation.
Benchmarking Exercise	An informal approach to multiple (2-3) potential suppliers/ contractors to obtain intelligence on costs, to compare and help inform the correct budget amount, prior to going to tender (market testing).

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)

Name of Policy/Project/Decision	PRU (Phase 2-Whitefield Centre)-request for approval to invite tenders for work in relation to the Pupil Referral Unit.
Lead Officer (SRO or Assistant Director/Director)	Jeanette Richards
Department/Team	Children’s Services
Proposed Implementation Date	5.6.2024-Cabinet Date
Author of the EqlA	Samantha Horrocks
Date of the EqlA	20.5.2024

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?

Can embed or link to existing report/document in this section

The Pupil Referral Unit (PRU) is a special school catering for 137 secondary age (11-16) pupils with a range of additional educational needs. The PRU operates out of four buildings.

The proposal is to request approval to invite tenders for work in relation to the Pupil Referral Unit, specifically in relation to the PRU's Whitefield Centre.

This relates to Phase 2 of works following the relocation of the main PRU building from Spring Lane to the New Kershaw Centre in February 2024 (Phase 1). Approval is required to proceed to tender to obtain a competitive construction price.

Alongside this, one of the PRU's other buildings, Milltown House has had to be taken out of use because of its condition. The loss of the Spring Lane School site, and limitations to the scope of accommodation available at the NKC has resulted in a shortfall of accommodation available to the PRU, particularly in respect of the delivery of vocational subjects.

The local authority has worked with the leadership team of Spring Lane school, and the Oak Leaning Partnership, which is the proposed sponsor of Spring Lane School, to determine the immediate requirements for accommodation, but also to develop a longer-term estate strategy recognising the changing demands on provision, and the existing fragmented nature of the PRU estate, operating out of four buildings.

Phase 2 is now urgently required, to further expand/ enhance the current provision at the New Kershaw Centre and the Whitefield Centre following the relocation from Spring Lane School. Initially, the focus was on the possible internal reconfiguration of the PRU's existing building in Whitefield. However, time constraints, requiring the accommodation to be available from the autumn term, resulted other options also being considered.

The provision of temporary modular accommodation for the whole school positioned at Whittaker Street, Radcliffe was found to be the only option that could deliver the accommodation that the school require within the timescales available.

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?
<p>Employees: Yes Community/Residents: Yes Third parties such as suppliers, providers and voluntary organisations: No – the additional accommodation is primarily for use by school pupils, and so the impact will be on pupils on roll at the school, and the staff employed in the school.</p> <p>If the answer to all three questions is ‘no’ there is no need to continue with this analysis.</p>

2.2 Evidence to support the analysis. Include documentary evidence, data and stakeholder information/consultation
<p>Documentary Evidence:</p> <p>Once approval is received to invite tenders for work in relation to the Whitefield Centre the design team will develop the scheme through each of the RIBA stages, with each stage developing the level of detail following client/service user engagement.</p> <p>The scheme will then be presented for approval, developed to RIBA stage 4 which brings together the detail of the scheme, a programme for its implementation, and detailed costs. These are the culmination of the design process that has looked in detail at the needs of the children and young people attending the school, and those who will attend in the future.</p> <p>The design process will have regard to the complex needs displayed by many of the children and young people.</p>
<p>Data:</p> <p>The school currently caters for 137 pupils with a range of additional educational needs. The scheme will provide additional accommodation to serve a further 50 children and young people.</p> <p>The increase in capacity responds to the Specialist Sufficiency Strategy that recognises the increasing demands within the local population for special school places.</p>

This scheme sits alongside other projects which include the provision of three new Special schools, and also additional Resourced Provision units linked to mainstream schools. All of this is designed to ensure a continuum of high-quality provision to meet the needs of the local population.

Stakeholder information/consultation:

The Phase 2 scheme forms part of a wider Specialist Sufficiency Strategy that has been the subject of extensive consultation with a wide range of stakeholders.

The strategy forms part of the PSV management plan which is overseen by the PSV Board which brings together key stakeholders.

More specifically, in respect of the PRU, the input of the school leadership team and Oak Learning Partnership and the wider school community has been an essential part of the process to inform design and delivery of the project and to ensure that the proposed modular building responds to the needs of its pupils.

The Leadership Team of the PRU has engaged with its service users throughout, on proposals impacting the location of its provision. The PRU serves pupils from across the borough, and those pupils largely access the provision via transport arranged through the local authority. The change in location is not as critical therefore as with a mainstream school serving a distinct geographical community. Because pupils are provided with transport via the local authority, no family will be disadvantaged in terms of access to the provision.

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? No
- Could the proposal affect the usage or experience of a service because of a protected characteristic? No
- Could a protected characteristic be disproportionately advantaged or disadvantaged by the proposal? No
- Could the proposal make it more or less likely that a protected characteristic will be at risk of harassment or victimisation? No
- Could the proposal affect public attitudes towards a protected characteristic (e.g. by increasing or reducing their presence in the community)? No
- 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	There is no change to the age range of the school.	N/A	N/A	Neutral
Disability	Accessibility to the building to facilities, and to learning	Scheme design	During the design development there has been a focus on accessibility and ensuring the space is welcoming and accessible to all.	Positive
Gender Reassignment	There is no change that will impact	N/A	N/A	Neutral
Marriage and Civil Partnership	There is no change that will impact	N/A	N/A	Neutral

Race	There is no change that will impact	N/A	N/A	Neutral
Religion and Belief	There is no change that will impact	N/A	N/A	Neutral
Sex	There is no change that will impact	N/A	N/A	Neutral
Sexual Orientation	There is no change that will impact	N/A	N/A	Neutral
Carers	There is no change that will impact	N/A	N/A	Neutral
Looked After Children and Care Leavers	There is no change that will impact	N/A	N/A	Neutral
Socio-economically vulnerable	There is no change that will impact	N/A	N/A	Neutral
Veterans	There is no change that will impact	N/A	N/A	Neutral

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

2.5 Characteristics	Action	Action Owner	Completion Date
N/A			

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
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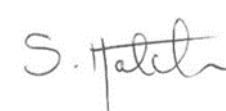
3.2 Level of risk identified	
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3.3 Reasons for risk level calculation	<p>Low Risk-0 No risk as positive amendments have been made during the design stage of the build scheme.</p>
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Section 4 - Analysis Decision (Page 11 of the guidance document)

4.1 Analysis Decision	X	Reasons for This Decision
There is no negative impact therefore the activity will proceed	X	There are no negative impacts from the activity
There are low impacts or risks identified which can be mitigated or managed to reduce the risks and activity will proceed		
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	Paul Cooke	21/05/24	
Responsible Asst. Director/Director	Stephen Holden	21/05/24	
EDI	L. Cawley	21/05/24	

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details

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Classification:	Decision Type:
Open	Key

Report to:	Cabinet	Date: 05 June 2024
Subject:	Developer Contributions for Education Supplementary Planning Document- Consultation Draft	
Report of	Leader and Cabinet Member for Strategic Growth	

1. Summary

- 1.1 The purpose of this Supplementary Planning Document (SPD) is to set out how the Council will deal with developer contributions for education when determining planning applications for relevant developments that may impact on education provision, such as school places.
- 1.2 The SPD must be read alongside Places for Everyone Policy JP-P5 'Education, Skills and Knowledge' which includes education and skills provision and a requirement where appropriate for housing developments to make a financial contribution for the provision of additional school places.
- 1.3 The SPD sets out the national and local planning policy context before setting out the approach to be taken in seeking developer contributions for education. An education contribution will only be sought where the proposed development would lead to a projected shortfall of primary and secondary places at schools within the local area of a development (and not to address any existing shortfall).
- 1.4 As per PfE Policy JP-P5, developments for housing should contribute towards education provision unless it is not financially viable for the development, or it is neither practicable nor desirable. Developer contributions towards education provision will be gathered in line with national regulations. The tests for planning obligations including S106 developer contributions, are that they must be: necessary to make the proposed development acceptable in planning terms; directly related to the development; and fairly and reasonably related in scale and kind to the development.
- 1.5 Financial contributions will be negotiated at planning application stage and will be secured through a planning obligation. The planning obligation will specify the amount of the contribution and when it will be paid. The SPD sets out how to calculate the amount of contribution required in each case.
- 1.6 Once adopted, the SPD will be a material consideration in planning decisions. If development proposals do not comply, the SPD and the policy it supplements may be used as a reason for the refusal of planning permission.

- 1.7 It is proposed that, following consultation, a further version of the Developer Contributions for Education SPD will be brought back to Cabinet for formal approval.

2. Recommendations

2.1 That Cabinet:

- i) Approves the draft Developer Contributions for Education SPD attached at Appendix 1 as the basis for a six-week public consultation commencing June 2024.
- ii) Delegates approval to the Executive Director of Place to make modifications to the draft Developer Contributions for Education Supplementary Planning Document- before consultation commences.

3. Reasons for recommendation(s)

- 3.1 To ensure that all stakeholders are given the opportunity to have their say on the draft Developer Contributions for Education Supplementary Planning Document.

4. Alternative options considered and rejected

4.1 None

Report Author and Contact Details:

Name: David Wiggins

Position: Service Manager: Strategic Planning and Infrastructure

Department: Business, Growth and Infrastructure

E-mail: d.i.wiggins@bury.gov.uk

5. Background

- 5.1 Places for Everyone (PfE) is a joint plan of nine Greater Manchester districts and was adopted on 21st March 2024.
- 5.2 One of the key aims of PfE is to set out where we will build the new homes we need, where our businesses will locate to sustain and create jobs for our people, what infrastructure is needed to support the development and to protect and enhance our towns, cities and landscapes. It is proposed to cover a timeframe up to 2039. In meeting our statutory housing targets, there is a requirement to ensure that the necessary infrastructure is also provided to cater for the needs of increased households, including education provision.

5.3 PfE Policy JP-P5: Education, Skills and Knowledge sets out the criteria that form the basis for the determination of proposals for education. The Policy seeks to ensure that, where appropriate, housing developments make a financial contribution to the provision of additional school places and/or set aside land for a new school, proportionate to the additional demand that they would generate.

6. Scope of the SPD

6.1 The need for and amount of the financial contributions will be identified at the planning application stage. A contribution will be identified as being necessary where it is considered that the proposed development would have an impact on existing school provision in an area.

6.2 Contributions towards education will be sought for residential developments of 10 dwellings and above. In agreeing a contribution, the viability of the proposed development and the need to satisfy other policy requirements, will be considered in line with PfE Policy JP-P5.

6.3 Financial contributions will be calculated based upon expected pupil yields resulting from the proposed development, as informed by the DfE Pupil Yield dashboard and identified costs per school place to accommodate expansion of provision.

6.4 Based on these standards, 1 dwelling would yield 0.25 of a primary school place and 0.13 of a secondary school place. The identified yield would need to be accommodated through either the existing provision, or where it is found that there is insufficient capacity of school place provision in the area, through developer contributions towards new provision. This will be determined at application or pre-application stage.

6.5 For the cost of school places, the Government recommends using figures from the latest Local Authority Scorecard as a basis of the cost per pupil place. This is published yearly by the DfE usually in June. The latest costs were published on the 29th June 2023 and are provided below:

Table 1 Expected Expansion and New Build costs of School Place Provision Type

School Place Type	Cost Estimate
National Primary	
Permanent Expansions	£19,425
New Build	£23,192
National Secondary	
Permanent Expansions	£26,717
New Build	£28,096

6.6 In the majority of cases a formula-based approach to calculate the financial contribution towards education provision that will be sought from new housing development will be applied:

**Number of dwellings x Pupil yield factor x Cost per pupil place
= Financial contribution**

- 6.7 The financial contribution secured via this mechanism will enable the Council to fund the capital infrastructure works associated with addressing the increased pressure on school provision that the development will generate. For information, a worked example of a financial contribution is set out within the Draft SPD.
- 6.8 The planning obligation will specify that the financial contribution will be spent on the provision of and/or improvements to educational provision within the Borough. This will relate to creating the additional educational provision, facilities or early years places needed to accommodate the new development or ensuring a setting is in an appropriate condition to accept pupils. This also will include spaces and places to address SEND provision as required.
- 6.9 The Council will require financial contributions to be paid prior to the implementation of the planning permission. However, there may be cases where contributions can be phased. There must be specific evidence to justify this, and it is the responsibility of the developer to demonstrate the benefits of phased payments. This must be agreed by the Council before the signing of the legal agreement. Trigger dates will be set for phased payments and will be laid out in the legal agreement. For example, S106 contributions could be payable by instalments with 50% paid upon commencement of development and the remaining 50% paid upon first occupation of the development.
- 6.10 Legal costs and administration charges will need to be paid prior to the completion of the agreement unless otherwise agreed in writing by the Council.
- 6.11 Individual legal agreements will specify timeframes for financial contributions to be spent. The standard period for this will be 10 years from the date of receipt to the point at which it is allocated, as recommended by the DfE guidance. If monies remain unallocated at the end of the relevant contribution period, they will be refunded.

7. Consultation and Adoption

- 7.1 The SPD is being prepared in accordance with the Town and Country Planning (Local Planning) (England) Regulations 2012 which are reflected in our Statement of Community Involvement. The Regulations set out that a draft SPD must be:
- Screened to determine whether Strategic Environmental Assessment or Habitat Regulation Assessment is required. The outcomes of the screening opinion will be published alongside the draft SPD.

- Made available for public consultation for a 4-week minimum period.
- Be made available as an online copy and have hard copies available at the Council's main reception and all libraries across the Borough.

7.2 The SPD will be prepared in accordance with these regulations and relevant material available for inspection on the Council's web site; the Town Hall reception; Bury, Prestwich, Radcliffe or Ramsbottom Libraries and at the Tottington Centre. Letters/emails will also be sent to all contacts on the Council's development plan database. We will also advertise the consultation via social media platforms.

7.3 Following consultation, the draft SPD will, if necessary, be amended before being brought back to Members seeking formal approval for the adoption of the document.

8. Conclusion

8.1 Members are asked to consider the draft Developer Contributions for Education Supplementary Planning Document and approve the document for consultation purposes.

Links with the Corporate Priorities:

Places for Everyone forms part of the Council's Policy Framework (being one of the statutory plans listed under Article 4 of the Council's Constitution). The Developer Contributions for Education SPD supplements PfE Policy JP-P5: Education, Skills and Knowledge and takes account of national planning guidance.

Equality Impact and Considerations:

A full EIA has been completed. There are no negative impacts on equality and a positive impact recorded.

Environmental Impact and Considerations:

No material environmental impacts.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
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<p>Stakeholders do not engage in the consultation on the draft Developer Contributions for Education Supplementary Planning Document</p>	<p>The SPD is being prepared in accordance with the Town and Country Planning (Local Planning) (England) Regulations 2012 which are reflected in our Statement of Community Involvement. However, the consultation process will be kept under review and will be adjusted if additional stakeholder engagement is required.</p>
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Legal Implications:

Ensuring that there are sufficient places in Borough for those of compulsory school age is a key general statutory requirement (Section 14, Education Act 1996). The above proposals contribute to ensuring that this general duty can be satisfied by ensuring there is sufficient infrastructure and school places in the area.

The statutory requirements for the preparation of SPDs are set out in the Town and Country Planning (Local Planning) (England) Regulations 2012 and paragraph 7.1 of this report sets out how these requirements are being followed. Before adoption of the SPD, Cabinet will need to consider the issues raised during the consultation and how those issues have been addressed. SPDs do not form part of the development plan so they cannot introduce new planning policies. They are however a material consideration in determining planning applications.

Financial Implications:

There aren't any implications for the general fund and capital budgets directly arising from this report.

Appendices:

Appendix 1 - Draft Developer Contributions for Education Supplementary Planning Document

Background papers/information:

None.

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

Term	Meaning
SPD	Supplementary Planning Document
PfE	Places for Everyone

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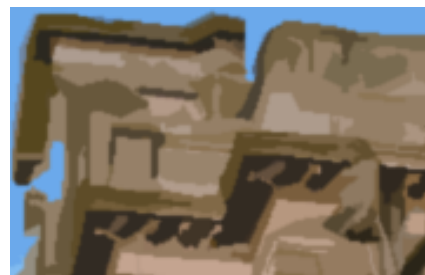
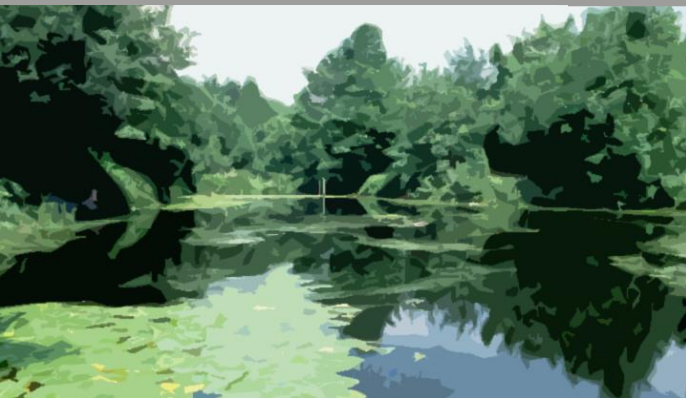
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Supplementary Planning Document 17

Developer Contributions for Education

June 2024



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4	Implementation	15
5	Monitoring and Reporting	18

Appendix 1- Bury Pupil Planning Areas



1 Introduction

- 1.1 This Supplementary Planning Document (SPD) sets out the Council's approach to seeking developer contributions towards education. It has been prepared accordance with the Town and Country Planning (Local Planning) (England) Regulations 2012 and the National Planning Policy Framework 2023 and supports Policy JP-P5: Education, Skills and Knowledge of the adopted Places for Everyone Plan.
- 1.2 Planning Obligations are also known as developer contributions and are secured in conjunction with a related planning permission under Section 106 (S106) of the Town and Country Planning Act 1990 (as amended). S106 contributions are an established mechanism to secure the delivery of services or facilities needed as a result of new development. Contributions to infrastructure can be delivered by way of physical works on or off-site, land transfer or financial contributions.
- 1.3 The National Planning Policy Framework (December 2023) (NPPF) specifies that plans should set out the contributions expected from development. This should include the provision of infrastructure, such as that needed for education. This approach is supported by guidance from the Department for Education on securing developer contributions for education which clearly states that the Government expects local authorities to seek developer contributions towards school places that are created to meet the need arising from housing development.
- 1.4 To support the supply of school places, Bury Council and local schools receive grants from Central Governments. However, programmes such as the Basic Need Grant and Free Schools and other capital funding do not negate housing developers' responsibility to mitigate the impact of development on education. Where a new housing development will create an unacceptable impact on pupil places within schools, the Council will seek contributions to ensure adequate provision of education infrastructure.
- 1.5 Financial contributions will be negotiated by the Council and the developer at planning application stage and will be secured through a planning obligation. The planning obligation must specify the amount of the contribution and when it will be paid. The Council will use this SPD to calculate the amount of contribution required in each case.
- 1.6 Once adopted, this SPD will be a material consideration in planning decisions. If development proposals do not comply, the SPD may be used as a reason for the refusal of planning permission.

2 Policy Context

National policy and guidance

- 2.1 The revised National Planning Policy Framework (NPPF) came into force in December 2023. This document sets out the government's planning policies for England and how these are expected to be applied. The NPPF is a material planning consideration of significant weight. This means that it must be taken into account, where it is relevant, in deciding planning applications and appeals.
- 2.2 Paragraph 20 of the National Planning Policy Framework (NPPF) states that strategic policies should set out an overall strategy for the pattern, scale and quality of development, and make sufficient provision for community facilities such as education.
- 2.3 Paragraph 34 states that plans should set out the contributions expected from development. This should include setting out the levels and types of infrastructure such as that needed for education.
- 2.4 Paragraph 99 of the NPPF refers directly to education provision, highlighting the importance of schools in promoting healthy and safe communities. It states:
- “It is important that a sufficient choice of school places is available to meet the needs of existing and new communities. Local planning authorities should take a proactive, positive and collaborative approach to meeting this requirement, and to development that will widen choice in education. They should:*
- A) Give great weight to the need to create, expand or alter schools through the preparation of plans and decisions on applications; and*
 - B) Work with school promoters, delivery partners and statutory bodies to identify and resolve key planning issues before applications are submitted.”*
- 2.5 For further information on the NPPF and any emerging policy updates, visit the NPPF website at: [National Planning Policy Framework - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/policies/national-planning-policy-framework)

Planning Practice Guidance

- 2.6 The Government's Planning Practice Guidance (PPG) adds further context to the NPPF. In September 2019, the PPG updated its guidance on planning obligations towards education. In setting out what funding is available for education, the PPG (Paragraph: 007 Reference ID: 23b-007-20190315) states that Government provides funding to local authorities for the provision of new school places, based on forecast shortfalls in school capacity. There is also a central programme for the delivery of new free schools.
- 2.7 It also states that funding is reduced however to take account of developer contributions, to avoid double funding of new school places. Government funding and delivery programmes do not replace the requirement for developer contributions in principle.
- 2.8 Plan makers and local authorities for education should therefore agree the most appropriate developer funding mechanisms for education, assessing the extent to which developments should be required to mitigate their direct impacts.
- 2.9 Paragraph: 008 Reference ID: 23b-008-20190315 of the PPG sets out what contributions are required towards education. It states that plans should support the efficient and timely creation, expansion and alteration of high-quality schools. Plans should set out the contributions expected from development. This should include contributions needed for education, based on known pupil yields from all homes where children live, along with other types of infrastructure including affordable housing.
- 2.10 Plan makers and decision makers should consider existing or planned/committed school capacity and whether it is sufficient to accommodate proposed development within the relevant school place planning areas. Developer contributions towards additional capacity may be required and, if so, this requirement should be set out in the plan. Requirements should include all school phases age 0-19 years, special educational needs (which could involve greater travel distances), and both temporary and permanent needs where relevant (such as school transport costs and temporary school provision before a permanent new school opens).
- 2.11 Plan makers should also consider whether pupils from planned development are likely to attend schools outside of the plan area and whether developer contributions may be required to expand schools outside of the area.
- 2.12 When local authorities forward-fund school places in advance of developer contributions being received, those contributions remain necessary as mitigation for the development.

Department for Education Guidance

- 2.13 The Department for Education (DfE) oversees children's services and education in England. Local Authorities are responsible for making sure there are enough school places available in their area. The DfE provides Basic Need capital grant funding which support local authorities in meeting this statutory duty.
- 2.14 In August 2023, DfE published guidance entitled 'Securing developer contributions for education'. This document acknowledges that housing development should mitigate its impact on infrastructure relating to education. The guidance recommends that developer contributions should be sought for a range of school places, where need arises. This includes places for early years, primary, secondary and those with special educational needs and disabilities (SEND).
- 2.15 At the same time, the DfE also published its guidance on 'Estimating Pupil Yield from Housing Development'. This sets out the recommended approach to calculating pupil yield from housing development for the purpose of securing developer contributions.
- 2.16 Alongside this, the Pupil Yield Dashboard was also published. This data comprises all developments in England that have 10 or more dwelling that were started and completed between 2008 and 2022. From this data, pupil yield figures have been provided at each local authority level. This guidance recommends that these figures can act as baseline pupil yield factors which local authorities can choose to adopt, supplement and update over time. Alternatively, local authorities can produce bespoke pupil yield evidence.

Places for Everyone

- 2.17 Places for Everyone (PfE) is a joint plan of nine Greater Manchester districts and was adopted on 21st March 2024.
- 2.18 One of the key aims of PfE is to set out where we will build the new homes we need, where our businesses will locate to sustain and create jobs for our people, what infrastructure is needed to support the development and to protect and enhance our towns, cities and landscapes. The Plan covers a timeframe up to 2039. It is clear that Greater Manchester and Bury will see considerable population and housing growth over the plan period that will, in turn, lead to increased pressures on infrastructure, such as education.
- 2.19 This SPD supplements PfE **Policy JP-P5: Education, Skills and Knowledge** which states that significant enhancements in education, skills and knowledge to benefit existing and new residents will be promoted, including by:

1. Enabling the delivery of new and improved accessible facilities for all ages, such as early years, schools, further and higher education, and adult training to ensure our workforce is ready to benefit from new employment opportunities.
2. Ensuring the delivery of sufficient school places to respond to the demands from new housing, such as through:
 - a. Working with education providers to forecast likely changes in the demand for school places; and
 - b. Where appropriate, requiring housing developments to make a financial contribution to the provision of additional school places and/or set aside land for a new school, proportionate to the additional demand that they would generate.
3. Supporting the continued growth and success of the university sector, such as through:
 - a. Enhancing the existing campuses and developing new ones;
 - b. Strengthening the world-leading research capabilities and promoting opportunities for business spin-offs; and
 - c. Continuing to help develop Greater Manchester as the UK's best destination for students.

3 Advice

- 3.1 Quality education provision is at the heart of sustainable communities and, therefore, should be a fundamental consideration of all new housing developments that have the potential to generate a significant increased demand for school places. Where new housing development creates a demand for school places in excess of those available, it is critical that developers make a contribution towards school places in order to mitigate against the effect of any new development on local infrastructure.
- 3.2 Contributions towards education will only be sought for residential developments of 10 dwellings and above and only where there is a projected shortfall of primary and/or secondary places at schools within the local area of a development.
- 3.3 Currently, primary pupil forecasts are calculated using data supplied by the Northern Care Alliance and are updated annually. Forecasts are also revised termly following each school census, to reflect movement in and out of the Borough during the academic year.
- 3.4 Secondary pupil forecasts are based on known cohorts of children within the primary sector and are adjusted annually to reflect movements both in and out of the Borough and cross border movements. Forecasts are also revised following each school census.
- 3.5 However, these forecasts do not take into account any additional requirement for pupil places that will be generated from new housing developments within the Borough. As such, where demand for school places extends beyond the capacity of existing or planned/committed schools within the relevant school place planning area, the Council will seek to ensure that a developer makes appropriate mitigation to offset the additional demands generated from their development.
- 3.6 The Council will, in the first instance, seek to direct investment associated with increasing the number of pupil places towards strengthening Bury's existing established education base. This will typically be through the physical expansion of existing schools in the area. This space could be either classroom or other accommodation such as a new hall or works to improve the condition of buildings to bring them back into use or by repurposing existing space. Expanding existing schools presents a great opportunity to secure the long-term future of education provision and use land in a sustainable way.
- 3.7 Where it is not feasible to expand facilities on an existing nearby school site, alternative sites for provision will be considered, either for:

- The expansion of an existing school that is slightly further away but can provide additional pupil places within the same or adjacent pupil planning area;
- The expansion of an existing school onto an additional site; or
- The provision of an entirely new school.

3.8 In some instances, it may be anticipated that more than one housing development may materialise which would generate a need for new school provision in a local area. Where possible, the Council will endeavour to deal with proposals in ways which will enable the financial burden of the school provision to be shared commensurately between the prospective housing developments.

3.9 In line with DfE guidance, contributions may also be used to provide temporary solutions to meet education needs where it is not possible to open a permanent new school at the point of need. However, the permanent provision of additional school places will still have to be funded to mitigate the impact of a development.

Pupil Planning Areas

3.10 For pupil place planning purposes, the primary phase is broken down into six planning areas, each representing one of the local townships of Ramsbottom, Tottington, Bury, Radcliffe, Whitefield and Prestwich. Secondary schools are less sensitive to immediate geography and there is far greater movement of students across the Borough, which suggest a less localized solution to demand pressures. Location of new secondary school places is more likely to be determined strategically, rather than on geographical proximity to specific housing developments. The Plan at Appendix 1 identifies the distribution of the six pupil planning areas across the Borough.

3.11 The Council will publish information annually on primary school capacity across each of the six planning areas. This will determine whether it is appropriate to continue to seek financial contributions from new housing development across all parts of the Borough, having regard to existing capacity.

Exemptions

3.12 Education contributions will be sought in relation to outline or full applications for planning permission for residential developments of 10 or more houses or flats with two or more bedrooms and which are likely to result in the need for additional education provision.

3.13 We will not seek developer contributions towards education from the following:

- One-bedroom houses and apartments; and
- Non-family units such as sheltered accommodation, retirement apartments, residential institutions and houses in multiple occupations.

3.14 These types of housing will therefore not be included in any calculations under this SPD.

3.15 For the avoidance of doubt, the requirements set out in this report are applicable to affordable housing schemes. Affordable housing development will increase the population in a pupil planning area and create permanent demand for school places and will therefore require provision for additional pupil places to be made.

Approach to seeking developer contributions towards education provision

3.16 All major planning applications for 10 or more dwellings will be assessed by the relevant Council officers. The assessment will establish whether the proposed development will have an unacceptable impact on education provision in the pupil place planning area.

3.17 In most cases the Council will apply a formula-based approach to calculate the financial contribution towards education provision that will be sought from new housing development. The financial contribution secured via this mechanism will enable the Council to fund the capital infrastructure works associated with addressing the increased pressure on school provision that the development will generate.

3.18 New housing development of 10 or more dwellings will be expected to make a financial contribution towards education provision based on the following calculation:

$$\text{Number of dwellings} \times \text{Pupil yield factor} \times \text{Cost per pupil place} \\ = \text{Financial contribution}$$

3.19 There may be cases where a different approach is needed, depending on what factors are affecting the capacity of the school. For example, if a whole new school is needed and the developer does not want to build this directly, then the contributions required may be different from the figure arrived at using this calculation.

- 3.20 The planning obligation will specify that the contribution will be spent on the provision of and/or improvements to educational provision within the Borough. This will relate to creating the additional educational provision, facilities or early years places needed to accommodate the new development or ensuring a setting is in an appropriate condition to accept pupils.
- 3.21 This will typically be within the pupil planning area within which the development lies. However, in certain circumstances it may be appropriate for contributions to be directed towards facilities within an adjacent pupil planning area, where a development would result in additional pressure on these facilities.
- 3.22 For SEND provision, we will identify projects and direct funds appropriately to meet the expected increase in need. Contributions may be pooled towards additional teaching space in a special school or a SEND unit at a mainstream school. They could also be used for school building alterations that increase a mainstream school's capacity to cater for children with special educational needs.
- 3.23 For outline applications, the amount of contribution may not be known. However, an obligation will be required at the outline stage that links the amount of contribution to be made to the calculation formula set out within this SPD. The contribution requirement will then be finalised once the Reserved Matters approval has been secured. This will take into account, consideration of up-to-date pupil yields and build cost estimates.

Pupil Yield Factor

- 3.24 The DfE pupil yield dashboard has been created as the result of a plan to reduce inconsistencies and improve baseline data available to local authorities. The DfE has worked with the Office for National Statistics (ONS) to produce pupil yield data for all local authorities in England.
- 3.25 This data provides a long-term profile of the number of recorded pupils aged 2-19 in mainstream education, the distribution of these pupils by tenure and size of dwelling and the number of pupils attending specialist provision (special schools, pupil referral units and other alternative provision) and the proportion of pupils in mainstream or specialist settings with Education, Health Care plans (EHCP). Pupil yield factors are then determined from this data at local authority level by education level, needs and housing characteristics. The guidance makes clear that local authorities can choose to adopt, supplement and update this data over time. Alternatively, local authorities can produce bespoke pupil yield data.

- 3.26 Given that the DfE's pupil yield evidence is the most up to date data currently available, this will be used to calculate the estimated number of pupils to arise from new housing development. However, in line with the DfE Guidance, we will update pupil yields when this is refreshed. This will also be updated when more evidence is gathered locally. Currently, 1 dwelling, proposed as part of a new residential development, will yield 0.25 of a primary school place and 0.13 of a secondary school place.
- 3.27 The identified yield will need to be accommodated through either the existing provision, or where it is found that there is insufficient capacity of school place provision in the area, through developer contributions towards new provision. This will be determined at application stage.
- 3.28 DfE's guidance on delivery of schools to support housing growth and the Pupil Yield Dashboard can be found here: [Estimating pupil yield from housing development \(publishing.service.gov.uk\)](https://publishing.service.gov.uk/guidance/estimating-pupil-yield-from-housing-development)

Cost Estimates

- 3.29 For the cost of school places, the Government recommends using figures from the latest Local Authority Scorecard as a basis of the cost per pupil place. This is published yearly by the DfE usually in June. The costs outlined in this SPD were published on the 29th June 2023.
- 3.30 Where the education contribution has not identified a new school requirement the 'Permanent Expansion' national average costs per place will be used. The latest costs are provided below:

National Primary

Type of School Place Type	Cost Estimate
Permanent Expansions	£19,425
New Build	£23,192

National Secondary

Type of School Place Type	Cost Estimate
Permanent Expansions	£26,717
New Build	£28,096

- 3.31 These up to date costs can be found here: [Local authority school places scorecards, Reporting year 2022 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://explore-education-statistics.service.gov.uk/scorecards/reporting-year-2022)
- 3.32 As set out by the DfE, we have assumed that the cost for an early year's place will be the same as a primary pupil place. Similarly, we have assumed that the cost for a 16-18 pupil place is the same as a secondary pupil place.

- 3.33 SEND costs are based on information from the National Cost Benchmarking Report, uplifted with ONS inflation data (or such update or other Department for Education (DfE) recognised report as may replace or supersede it). See the most recent version of the study here: [Cost of School Buildings – National Benchmarking Study 2021/22 now available and 2022/23 submissions now requested | EBDOG](#)
- 3.34 Construction inflation is currently high, so the detailed figures are indicative only. The cost of a new school or extensions to an existing school will vary depending on size, location, and facilities. However, these costs would be used as a starting point for estimating the costs of provision.

Strategic Sites

- 3.35 Large Strategic sites of more than 200 dwellings may require additional primary infrastructure to support them. The scale of the infrastructure needed will depend on whether existing schools can be expanded. It would also depend on what other housing developments in the area may be coming forward in the short to medium term future.
- 3.36 Where it is not practicable for the Council to expand capacity within existing schools sufficient to accommodate the additional requirements for pupil places that will be generated by a development and there are no alternative solutions available, the Council will negotiate with the developer to ensure that appropriate provision is made for the pupil place requirement that the development would generate. In such circumstances, the developer will be required to set aside land for the provision of a school. The value of the land will be taken into consideration when determining the financial contribution required.
- 3.37 Where land is to be set aside for a new school on a site which is in multiple ownership collaborative working will be required between the various land owners to come to an agreed position on the location of the new school on the site.
- 3.38 Where land is to be set aside for a new school, the Council would need to ensure that this is of an appropriate size and location. The land would need to be of a sufficient size to accommodate a new school building and its associated outdoor recreation space. The site should also be accessible to the catchment it is intended to serve.
- 3.39 Where land is to be set aside for a school, the school should be operational at a sufficiently early stage in the phasing of the overall development in order to ensure that the demand for school places can satisfactorily be accommodated as the development is built out without causing pressure elsewhere. It would therefore normally be appropriate for the Council to use

a planning condition that requires the school to be complete and available for use before defined phases of the development may proceed.

Worked Example

3.40 For information, a worked example contribution is provided below:

Education Contribution Worked Example

Proposed Development size: 100 homes

Amount of school places required:

Primary school places: $100 \times 0.25 = 25$

Secondary school places: $100 \times 0.13 = 13$

Total school places to be accommodated as a result of the proposed development
=

Expansion/development cost per place

Primary school provision: $\pounds 19,425 \times 25 = \pounds 485,625$

Secondary school provision: $\pounds 26,717 \times 13 = \pounds 347,321$

Total school places expansion/development cost: $\pounds 832,946$

4 Implementation

Pre-application Discussions

- 4.1 The Council appreciates that developers will require certainty and expect to know the extent of any financial contributions necessary to mitigate the effects of their development prior to submitting a planning application to ensure the viability of their scheme. We therefore recommend that that pre-application advice is sought before making a planning application.
- 4.2 This provides an opportunity to start discussions with planning officers and other relevant colleagues about the proposals. It also means that the developer contributions likely to be required are made known to the developer as early as possible in the decision-making process.
- 4.3 Details of the pre-application process can be found on our website at: [Pre-application advice - Bury Council](#)
- 4.4 Following these discussions, the planning application submission should clearly set out how the policies of the development plan will be addressed, including the provision of infrastructure. 'Heads of Terms' for the S106 agreement must be agreed prior to recommendation on the planning application.

Viability

- 4.5 All developer contributions including education contributions required by, or to achieve compliance with, local or national policies will be assessed during the consideration of the planning application. Applicants should ensure that development proposals adhere to all relevant development plan policies and that these requirements are factored into land value.
- 4.6 This reflects the NPPF, which states that where up-to-date policies have set out the contributions expected from development, planning applications that comply with them should be assumed to be viable. It is therefore up to the applicant to demonstrate whether particular circumstances justify the need for a viability assessment at the application stage and, where needed, provide evidence of what has changed since then. Overpayment for land will not be accepted as a reason for reducing contributions.
- 4.7 Where an applicant intends to submit a viability assessment to negotiate a reduced contribution, this must be received before the validation of the planning application. The viability appraisal will be independently assessed by consultants acting on behalf of the Council and the cost of this will be covered

by the applicant. A viability appraisal summary will be included within committee reports where relevant and all Viability Assessments will be published on the Council's Website.

- 4.8 A revised viability assessment will be required where material changes are made following the submission of the planning application, or where there are delays where issues have not been resolved within the timescales originally envisaged.

Drafting of S106 Agreements

- 4.9 S106 agreements will normally be drafted by the Council's Legal Services team. Applicants will be required to pay the Council's reasonable costs incurred in drafting and completing the agreement.
- 4.10 In all circumstances where a legal agreement is required, the applicant would be expected to provide details of land ownership at the beginning of the application process and would be a validation requirement. These should be copies of the Title document and plan obtained within the preceding three months from the Land Registry, or if the land is unregistered, copies of the most recent conveyance being at least 15 years previous.
- 4.11 All landowners and parties holding an interest in the land will also need to be party to the legal agreement. If the site is subject to a mortgage, the mortgage will also need to enter into the legal agreement.
- 4.12 A S106 proforma is available on the Council's website and should be submitted alongside any planning application that would meet the thresholds defined within this document and be submitted with the planning application documentation.

Transfer of Land

- 4.13 On strategic sites where a new school is required on-site, or where an existing school is to be extended, there may be the option for the developer to build the facilities themselves to the Council's design. This will depend on the specific details of the development and may include the transfer of land to the Council, in addition to the build. In such cases, developers will be required to pay the Council's legal fees in respect of the land transfer.
- 4.14 In cases where a developer chooses to retain responsibility of the land, they will be bound to keep hold of it and maintain it to a specification agreed with the Council in perpetuity.

Indexation

- 4.15 Financial contributions are based upon the costs of infrastructure or services. Financial contributions will be indexed to ensure that they retain their original 'real value'. The base date and base value of the indexation will be stipulated when costs are prepared. An appropriate index will be used for the type of infrastructure or services sought.

Timing/Phasing of Payments

- 4.16 The Council will require financial contributions to be paid prior to the implementation of the planning permission or as otherwise agreed as part of a programme of staged payments. Legal costs and administration charges will need to be paid prior to the completion of the agreement unless otherwise agreed in writing by the Council.
- 4.17 For large strategic sites, there may be cases where contributions can be phased. There must be specific evidence to justify this, and it is the responsibility of the developer to demonstrate the benefits of phased payments. This must be agreed by the Council before the signing of the legal agreement. Trigger dates will be set for phased payments and will be laid out in the legal agreement. For example, S106 contributions could be payable by instalments with 50% paid upon commencement of development and the remaining 50% paid upon first occupation of the development.
- 4.18 The Council will calculate the total financial contribution payable including interest and/ or indexation which will be made available to the developer. On receipt, financial contributions will be transferred to the relevant internal department who will be responsible for spending the contribution.
- 4.19 Individual legal agreements will specify timeframes for financial contributions to be spent. The standard period for this will be 10 years from the date of receipt to the point at which it is allocated, as recommended by the DfE guidance. For some planning applications, particularly those that are outline or phased, a longer timeframe may be more appropriate. If monies remain unallocated at the end of the relevant contribution period, they will be refunded.
- 4.20 Should we decided to forward-fund school places in advance of the financial contribution being received, the applicant will be liable to recover the monies spent, including interest, fees and expenses, as well as the principal sum.
- 4.21 Following receipt, financial contributions will be held in interest bearing accounts. They will be individually identifiable due to each contribution being allocated a unique financial code. The financial contributions will only be spent on increasing education provisions related to their development.

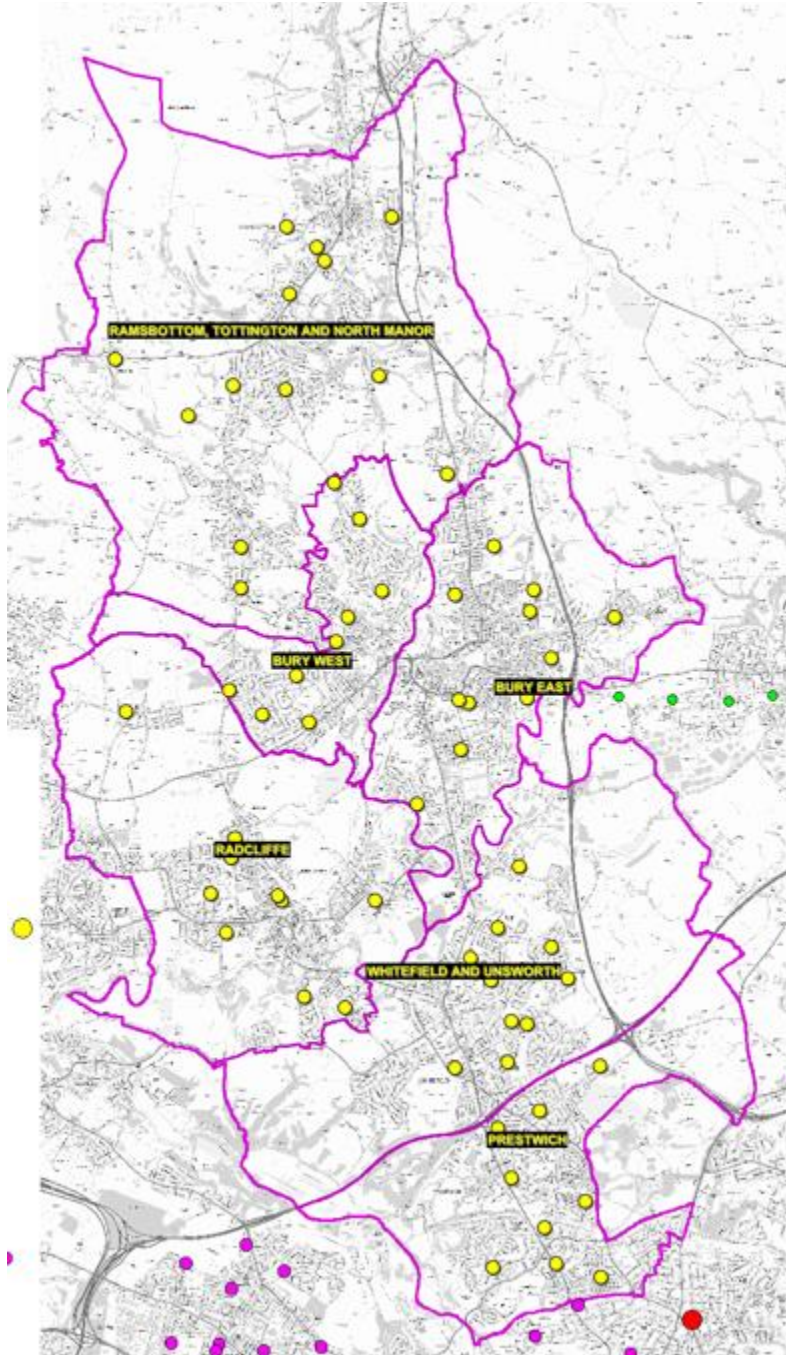
5 Monitoring and Reporting

- 5.1 We will monitor compliance with legal agreements, to ensure that financial contributions and non-financial obligations are delivered on-time. Once an agreement has been signed, administrative costs are incurred on tasks such as ensuring on-site measures are provided, financial contributions are received, and contributions are spent in accordance with the terms of the obligation. This requires compliance checks, monitoring, project management and implementation by the Council.
- 5.2 Developer's entering into s106 agreements will be required to pay a monitoring fee to cover the costs incurred in monitoring developer contributions. The fee will be dependent on upon the nature and complexity of the contribution being monitored.
- 5.3 Where there is evidence of non-compliance with a planning obligation, the Council will instruct the Council's Legal Services team to take appropriate action to secure compliance. The Council will aim to recover all reasonable administration costs incurred which may include administration, correspondence and site visits. Non-compliance with a planning obligation could include failure to comply with the obligation, failure to notify the Council of a due payment and non-payment.
- 5.4 The Council is required to publish information on monies received and spent relating to new developments secured through s106 agreements. This information is published in the Council's Infrastructure Funding Statement and can be found on our website at [Infrastructure funding statement - Bury Council](#)

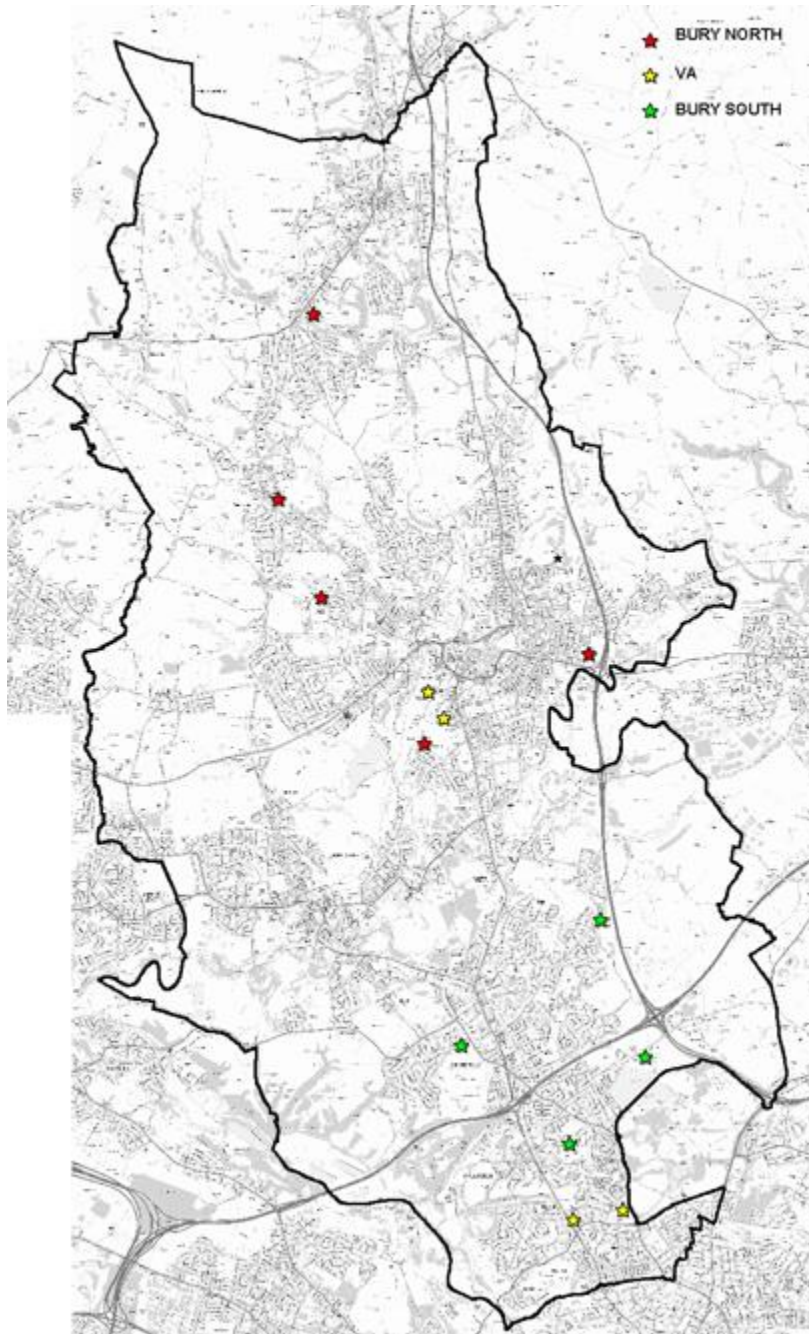
Appendix 1-Pupil Planning Areas



Bury Primary School Pupil Planning Areas



Bury Secondary School Pupil Planning Areas





Classification: Open	Decision Type: Key
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Report to:	Cabinet	Date: 05 June 2024
Subject:	Permission to Tender – Radcliffe Enterprise Centre	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

This report seeks permission to tender for a contractor to undertake the construction works required for the conversion of Radcliffe Library into an Enterprise Centre as part of the GM's UKSPF (UK Shared Prosperity Fund) SME (Small and Medium Size Enterprises) Workspace Fund (E22). The contractor will be appointed via the North West Construction Hub (NWCH) framework.

Stage 3 designs are now under review and planning application for change of use and internal remodelling have been submitted. Should 3 or more objections be made the matter will go to Planning committee on 26th June 2024.

Initial project costings suggest a construction cost in the region of £1.4m. (This excludes professional fees, surveys, inflation, etc). This is within the funding envelope although final costs will not be known until stage 4 designs have been evaluated and the work has been issued for tender.

Construction is due to commence in September 2024 in accordance with the funding requirements, must be completed by 31st March 2025. Should the Council fail to spend the funding before the 31st March 2025 there is a risk the Council will be liable for full project costs due to a clawback clause within the funding agreement.

Recommendation(s)

1. That Cabinet approve the proposed route to tender for the construction of the Enterprise Centre via the North West Construction Hub (NWCH) framework. A further report will be brought back to the September Cabinet meeting to approve the appointment of the preferred contractor.

Reasons for recommendation(s)

2. This a UKSPF funded project and is subject to strict timescales for completion. The project is progressing through the RIBA Stages and is currently on track. However, a delay in appointment of a contractor could significantly impact on progress leading to a failure to complete on schedule, bringing financial and reputational risk to the Council.

Alternative options considered and rejected

3. Delaying the decision to appoint a contractor has been discounted as this will significantly impact on the construction programme and risk non completion within the funding timescales.

Report Author and Contact Details:

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Department: Business, Growth & Investment

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Background

4. In 2022, Bury Council submitted a bid to GM's UKSPF SME (Small and Medium Size Enterprises) Workspace Fund (E22) to turn Radcliffe Library into an enterprise centre.
 - 4.1. The project aims to convert Radcliffe Library, located within Radcliffe Town Centre and adjacent to the Levelling Up regeneration activity (part of the Radcliffe Regeneration Framework) to a flexible, multi-functional Enterprise Centre. The space will provide a range of private offices and bookable hot desks to facilitate up to 100 occupiers and will be managed by a third-party operator.
 - 4.2. The UKSPF funding allocation for Bury to £1,270,423 or 92.4% of the total project cost of £1,716,000. The total project cost includes match funding of £445,577. This commitment from the Council was agreed by the Regeneration Board on 27th October 2022.
 - 4.3. The initial submission proposed delivery across all three years of the UK SPF programme with first year (2022/23) revenue used to assign a Project Manager alongside a market assessment exercise to understand potential demand. However, delays to the GM project evaluation process and the development of grant funding agreements have meant a revision to project timescales. GMCA (Greater Manchester Combined Authority) have received confirmation that Year 1 funding allocations can be rolled into Year 2 but there is no extension to the overall delivery period and the project must be completed by March 2025.
 - 4.4. A revised project delivery plan has been submitted and approved by GMCA and a grant funding agreement was signed on 23rd October 2023.
 - 4.5. The project features as part of a wider LUF (Levelling Up Fund) programme and is a key priority project identified in the Radcliffe Strategic Regeneration Framework (SRF), aimed at bringing forward a campus of buildings that deliver improvements to health, skills and employability, cultural engagement, and economic recovery of the town centre. The Hub is due for completion in Spring 2026 where the library will be permanently housed in modern state of the art building.

- 4.6. This project will enhance £20m LUF (Round 1) and £22m match funded from Bury Council capital programme, as well as provide commercial space for a Council-owned building worth £1.26m (£1.35m including the land value).
- 4.7. The end goal is to create a vibrant, flexible space that will enhance footfall in Radcliffe Town Centre further igniting additional investment into a location on the cusp of reinvention. This will nudge further investment and confidence in the town, providing additional business rates revenue to the Council and a reason to visit and invest in Radcliffe for businesses and house builders.
- 4.8 Options for a temporary library provision are under consideration. Various options have been considered, see below. It is the aim to keep provision within the Radcliffe area at an accessible site.

Place	Reasons
ROC Centre	Too far out of town centre Survey cost maybe prohibitive further work ongoing
Keep within Library	Ruled out initially due to risks and disruption Costs to keep service operating during construction prohibitive
Modulars on Library Car Park	Previous planning application brought to many issues Will review again as other options are available
Modular on Whittaker Street site with PRU	Not opening until November earliest
Radcliffe Market Hall	No units available Construction also due to start which will add further disruption
Shop units - south block/former regen office	Not suitable, not big enough – lack compliance and accessibility
Pimhole – Whitefield	Costs to preventative
Various churches, community centres and clubs	Existing programmes can't accommodation Issues with compliance and accessibility Cost prohibitive

N.B. investigations have been desk top and no negotiations have taken place with tenants/operator of the building and unless deemed viable none will held.

- 4.9 Covenant update – a requirement on the title for the building in 1905 to be used as a library “forevermore”. Legal advice has been sought and whilst it is not entirely clear the covenant is enforceable; it states that it is highly unlikely a court would force the Council to run a library from an unsuitable building and would recognise the improvements the new library will offer. However, to satisfy this, genealogy searches have been completed and three living descendances have been identified and written to requesting to negotiate the conveyance on the deed. We are awaiting responses. Further land searches are underway to ensure all benefactors are known and contacted. A point to note is that only legal benefactors can enforce the terms of the covenant so complaints from the public or councillors do not have legal jurisdiction.

Links with the Corporate Priorities:

5. Corporate Plan 2024/25 seeks to deliver the Vision for 2030 which is for the Council to be Achieving Economic Growth.
- 5.1 The regeneration of Radcliffe supports delivery of the ‘Let’s Do It!’ To stand out as a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation through the development of employment space to enable job creation and upskilling of residents, leading to economic growth.
- 5.2 **Local** – The project will enhance and secure the future of a valuable town centre asset and contribute to delivery of the wider Radcliffe SRF.
- 5.3 **Enterprise** to drive economic growth and inclusion – The project will create more flexible and innovative/digital workspaces to encourage more businesses to open and remain in Radcliffe; helping to ensure residents have the best chance to access good jobs.
- 5.4 **Together** – Ensuring a sustainable use for the library building is a key community ambition and all opportunities for continued public access will be considered as part of project development.
- 5.5 **Strength**-based approach - the project will; provide managed workspace and business support within a local neighbourhood. This will provide opportunities for community wealth building through new business start-ups, increased local spend and the adoption of new skills whilst reducing the need to out commute

Equality Impact and Considerations:

A full EIA has been completed. Impacts are neutral with actions and mitigations applied to reduce some negative impacts that have been identified.

Environmental Impact and Considerations:

7. Environmental impacts and concerns are being considered as part of the pre-construction services and will be in-line with existing Council policies.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
<p>Financial Risk A ‘hard stop’ of 31st March 2025 has been set by GMCA where all funding must be spent by this date. As per the Grant Funding Agreement Section 26 - GMCA may “clawback” all or part of funding if “an Event of Default” is</p>	<p>Cabinet approval of tender exercise</p>

deemed to have occurred. This includes but is not limited to delivery of the project before 31 st March 2024.	
Construction Risk Lack of interest and or availability in the market to complete within the programme timeline	Launch tender exercise as planned within project timeline with Cabinet approval for delegated decision. Use of frameworks ensures supplier meets the contract procure rules of the council and deliver best value and quality in a timely manner.
Reputational Risk Loss of confidence in the Council to deliver objectives	Cabinet approval of tender exercise and delegated powers of approval
Vacant Library Building Once the Hub is complete the library will decant to the new premises leaving the current building without purpose and therefore at risk of dereliction.	Conversion of library building to Enterprise Centre to provide ongoing use and commercial viability.
Library Covenant Enforcement the terms of the covenant	Benefactors have been contacted and further legal advice will be sought upon contact being made. If necessary, apply to Court to determine the meaning of the covenant and seek a remedy.

Legal Implications:

8. The Council is able to procure a contractor for these works through the North West Construction Hub (NWCH) framework. To be accepted onto the framework, contractors are subject to competition in respect of price and quality. Use of the framework will determine the form of the works contract which the Council and its chosen works contractor will enter into.

Financial Implications:

9. The stage three designs are completed, and these are now being costed. High level analysis suggests that the construction costs (excluding outstanding roof works) will be within the UKSPF funding envelope. Appointment of the contractor will be via a framework and the value is expected to be circa £1.2M.
-

Appendices:

[70578 | Change of use of existing library \(Use Class F1\) to Enterprise Centre \(offices/workspace\) \(Use Class E\(g\)\(i\)\) by internally remodelling the building | Radcliffe Public Library, Stand Lane, Radcliffe, Manchester, M26 1WR \(bury.gov.uk\)](#)

Background papers: N/A.

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

Term	Meaning
UKSPF	UK Shared Prosperity Fund
LUF	Levelling Up Fund

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)

Name of Policy/Project/Decision	Radcliffe Enterprise Centre – UKSPF Project Delivery (E22)
Lead Officer (SRO or Assistant Director/Director)	Sarah Porru, Assistant Director -Regeneration (Business & Economy)
Department/Team	BGI
Proposed Implementation Date	1st June 2024
Author of the EqIA	Sinead Gracey
Date of the EqIA	10.5.24

<p>1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?</p> <p>The project aims to convert Radcliffe Library, located within Radcliffe Town Centre and adjacent to the Levelling Up regeneration activity (part of the Radcliffe Regeneration Framework) to a flexible, multi-functional Enterprise Centre. The space will provide a range of private offices and bookable hot desks to facilitate up to 100 occupiers and will be managed by a third-party operator.</p> <p>Cabinet Paper for June 2024 seeks permission to tender for a contractor to undertake the construction works required for the conversion of Radcliffe Library into an Enterprise Centre.</p> <p>Funding but was part of the GM’s UKSPF (UK Shared Prosperity Fund) SME (Small and Medium Size Enterprises) Workspace Fund (E22). The contractor will be appointed via the North West Construction Hub (NWCH) framework. For which the Council was awarded £1.2m and match funded £445k.</p>

Library and tenants on the first floor, the Integrated Neighbourhood Team are due to move the new Hub which is currently under construction. The Hub was due for completion in Summer 2024 when conversations to relocate began. However the construction programme for the Hub has slipped to completion in Spring 2026.

In the meantime, funding opportunity has arisen with UKSPF and the council secured £1.7m for the transformation of the current library building into an Enterprise Centre, with a completion date for this is March 2025. All spending must be defrayed by 31st March 2025. To hit this deadline, therefore we need to decant the Library and its tenants in August 2024 in preparation for construction to start in September 2024. Locations for the temporary Library are still on going

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 (state reasons for answering ‘no’)**
 Community/Residents: **Yes (state reasons for answering ‘no’)**
 Third parties such as suppliers, providers and voluntary organisations: **Yes (state reasons for answering ‘no’)**


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:


There is already a EqIA in place for the Hub which covers the new Library


 Radcliffe%20Civic%20Hub%20EqIA.doc


 Radcliffe%20borrowers%20age%20ger

It is also important to note that this is a list of people who signed up to join Bury Libraries at Radcliffe Library, it is not the sum total of Radcliffe Library users. Members of the public join the whole library service at their first point of registration and are then free to use any service point they wish.

Data:



Bury-West-Neighbourhood-Profile.pdf

Stakeholder information/consultation:
 No consultations data available at this time however information sessions are planned once a temporary location is agreed – June 2024

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? no
- Could the proposal affect the usage or experience of a service because of a protected characteristic? no
- Could a protected characteristic be disproportionately advantaged or disadvantaged by the proposal? no
- Could the proposal make it more or less likely that a protected characteristic will be at risk of harassment or victimisation? no
- Could the proposal affect public attitudes towards a protected characteristic (e.g. by increasing or reducing their presence in the community)? no
- 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
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<p>Age</p>	<p>Potential additional travel to the new location which could affect primarily younger and older users (under 18 and senior citizen). Potential social isolation for senior citizen library users who rely on the library as social contact/community</p>	<p>That we have younger (under 18) and older (senior citizen) library users</p>	<p>The proposed location is on the same 98 bus route with stops close to the current library and proposed temporary site younger people and senior citizens have access to free or reduced cost bus travel</p> <p>Parking available at the new location</p> <p>New location is approximately 1.5 miles from current location which is an estimated 36 minute walk</p>	<p>Neutral</p>
<p>Disability</p>	<p>Potential additional travel to the new location which could affect primarily people with reduced mobility</p>	<p>No user data to this effect however Senior Citizens are more likely to acquire disabilities and reduced mobility through age</p>	<p>The proposed location is on the same 98 bus route with stops close to the current library and proposed temporary site, disabled people and senior citizens have access to free or</p>	

			reduced cost bus travel Parking available at the new location (does this include disabled parking spaces?)	
Gender Reassignment	n/a			
Marriage and Civil Partnership	n/a			
Pregnancy and Maternity	n/a			
Race	n/a			
Religion and Belief	n/a			
Sex	n/a			
Sexual Orientation	n/a			
Carers	n/a			
Looked After Children and Care Leavers	Potential additional travel to the new location which could incur additional costs for care leavers Potential social isolation for senior citizen library users who rely on the library as social contact/community	No evidence to point to		The proposed location is on the same 98 bus route with stops close to the current library and proposed temporary site, care leavers have access to free or reduced cost bus travel New location is approximately 1.5 miles from current location which

				is an estimated 36 minute walk
Socio-economically vulnerable	Potential additional travel incurring additional costs	No evidence to point to	Bee network has travel cost caps per journey or per day New location is approximately 1.5 miles from current location which is an estimated 36 minute walk	Negative
Veterans	n/a			

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

2.5 Characteristics	Action	Action Owner	Completion Date
Age	Research bus route and advertise.	Project Team	31 st August 2024
Disability	Research bus route and advertise. Seek additional parking	Project Team	31 st August 2024
Socio-economically vulnerable	Research bus route and advertise. Research options for free travel from Stand Lane building to new site	Project Team	31 st August 2024
All	Home Bury Libraries Catalogue (spydus.co.uk) Members can go onto the catalogue and place reservations (and some will phone up) and then you are notified when the books are ready to collect.	Library Team	Completed

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
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3.2 Level of risk identified	Low = 2
3.3 Reasons for risk level calculation	Unlikely to occur given mitigations and actions in place – issues that do arise can be addressed with the possibility of some financial investment

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

4.1 Analysis Decision	X	Reasons for This Decision
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	Impacts and risks will be monitored and address to reduce and eliminate the risk. Work still to be carried out.
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	Sinead Gracey	20.5.24	
Responsible Asst. Director/Director	Sarah Porru	21.5.24	
EDI	Lee Cawley	21.5.24	

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details



Classification: Open	Decision Type: Key
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Report to:	Cabinet	Date: 05 June 2024
Subject:	Awarding of Fresh Fruit and Vegetable Contract to a supplier on behalf of Catering Services	
Report of	Cabinet Member for Corporate Affairs and HR	

Summary

1. Bury Council's Schools Catering team serve over 10,000 meals per day across 55 Schools within the borough of Bury.

To ensure that the meals provided are of the best value and of a high quality to ensure school food compliance, food suppliers must be procured under strict regulations.

YPO (Yorkshire Purchasing Organisation) offer food supply frameworks to support local authorities which need to get best value for money and a consistent quality.

The catering team have used the 001114 Food Deal 2 Framework, procured by YPO in compliance with the Public Contracts Regulations 2015 plus a further price benchmark.

This Price Benchmark invited Tenders from all Suppliers who were successfully awarded onto the relevant Lot(s) of the Food Deal 2 Framework as a Call-Off Contract for the supply of Frozen food. Suppliers from the following Lots were therefore invited to take part:

Lot 3

The Call-Off Contract covers the period from 01/04/24 to 31/03/26 with 2 options to extend for an additional 12 months (2+1+1). The first decision to extend the contract period will be taken by the end of December 2025 and will be dependent on satisfactory completion of all aspects of the contract to date, the current market conditions for this Lot and Bury Council's contracting structures. The maximum contract period will therefore be 4 years from 01/04/24 to 31/03/2028 subject to an annual review, incorporating price negotiations and KPI performance.

The Call-Off Contract has an estimated value of £1,864,000 for the maximum life of the contract (4 years). The supply will be to 55 school kitchens. The core service is currently provided 38 weeks a year and is fully paid for by schools through their SLA (Service Level Agreement) charge.

There are also meals provided as part of HAF (Holiday Activity Fund) which is an initiative to provide meals to children entitled to free school meals who take part in organised activities during school holidays.

A "Shopping Basket" for the price evaluation was used. This shopping basket contained the most frequently purchased items, although it will not have been an exhaustive list. The service reserve the right to buy any additional products from the awarded supplier where these products fall within the same product lot/lots.

This is at the winning supplier's best delivered price.

The following highlights the breakdown of how the suppliers were scored to ensure cost, quality, and social value / sustainability.

PRICE BENCHMARK AWARD CRITERIA	
CRITERION	PERCENTAGE WEIGHTINGS
Cost – 60%	A score was determined following evaluation of the shopping basket in this benchmarking exercise.
Quality – 30%	The full score was carried forwards from the initial tender evaluation. This section was not re-opened during the benchmark.
Social Value/Sustainability – 10%	The full score was carried forwards from the initial tender evaluation. This section will not re-opened during the benchmark.

The scores for each supplier who chose to bid were:

Scores

Supplier	Rank	% Overall (total) Out of 100	% Price (cost) Out of 60	% Quality (delivery) Out of 30	% Social Value (account management) Out of 10
Ralph Livesey	1	91.2	60	23.7	7.5
Brakes	2	88.36	54.36	24.6	9.4
G W Price	3	78.06	54.96	17.4	5.7
Millers	4	73.76	45.06	22.5	6.2

Turner Price	5	73.3	46.7	18.6	8
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YPO is committed to delivering social value through responsible procurement and aims to work with suppliers who have considered their impact on the wider community and who have a focus as to how their services can improve the social value within their community and the communities of their customers.

Each supplier has varied and extensive Social Value ranging from reducing carbon, increasing recycling, staff training and development and the use of organic food.

It was agreed during the scoring process that Ralph Livsey although did not offer the most wide-ranging social value, combined with the price and social value provided, scoring second, it scored the highest marks overall.

Recommendation(s)

2. Approve the award of a contract relating to Fresh Fruit and Vegetable to the successful bidder for the period stated.

To authorise the Director of Law and Democratic Services in consultation with the Cabinet Member for Corporate Affairs and HR to finalise the terms of the contract to be entered into with the successful bidder.

Reasons for recommendation(s)

3. Ralph Livsey scored the highest across the three criteria proving best value, quality, and social / sustainable value. It is the best price for the quality to meet the needs of the catering provision as well as supporting Council's strategic priorities as well as meeting all governance and legal requirements.

Alternative options considered and rejected.

4. The Schools Catering team can revert to the AGMA (Association of Greater Manchester Authorities) preferred supplier, to which Bury Council can access; Dunster's Farms, however the cost of using Dunster's is not best value or quality and creates further budget pressures to the catering service and overall council budget.

Dunster's Farm is not ranked in the top 6 for Price, Quality or Social Value. If Ralph Livesey's are not awarded, procurement rules state that the supply would revert to Dunster's as part of the AGMA contract.

Report Author and Contact Details:

Name: David Catterall
Position: Head of Commercial Services
Department: Operations
E-mail: d.catterall@bury.gov.uk

Links with the Corporate Priorities:

- 5. Awarding Ralph Livsey's supports lower cost food but meets the compliant school meal standards and therefore supports the Catering Service to provide quality school meals. Quality school meals support better learning and provides better meals for those entitled to free school meals which supports better health and wellbeing.

Continued cost control within the catering service through sustainable procurement whilst awarding local suppliers supports economic growth in the borough.

Continued viability of the catering service through diligent cost control supports employment of over 280 staff, who are predominantly female, in lower paid employment. Through viability of the service, they can access improved learning and development which support skills improvement, and links to economic growth and supports improved health and wellbeing outcomes.

Equality Impact and Considerations:

Full EIA has been completed identifying neutral and positive impacts for children and young people with protected characteristics. No additional mitigations are required.

Environmental Impact and Considerations:

- 6. Awarding Ralph Livsey, who is a local supplier will support decarbonisation as distance travelled to deliver will be low.

Improved food quality supports less food waste which also supports improved cost control.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Not awarding to Ralph Livsey would result in the catering service having to use AGMA awarded Dunster's Farm for Fresh Fruit and Vegetables, this would create increased food costs.	Award the contract based on 2+1+1 years will full reviews of the contract annually.

Legal Implications:

7. This procurement process has utilised the 001114 Food Deal 2 Framework, procured by Yorkshire Purchasing Organisation in compliance with the Public Contracts Regulations 2015. The suppliers accepted onto the framework have already undergone a selection process according to quality and price criteria. Furthermore, the price has been subject to additional price benchmarking by the Council to ensure compliance with its duty of best value.

Financial Implications:

The financial implications from this report should be neutral as the cost of the goods should be passed on to the customers purchasing the Catering services.

Appendices:

None.

Background papers:

None.

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

Term	Meaning
YPO	Yorkshire Purchasing Organisation
HAF	Holiday Activity Fund
SLA	Service Level Agreement
AGMA	Associated Greater Manchester Authorities
Shopping Basket	List of most used food items that are compared during the tender process
EIA	Equality Impact Assessment
Call Off Contract	Contract based on a period of time and of a forecasted value

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EQUALITY ANALYSIS

This Equality Analysis considers the effect of Bury Council/ Bury CCG activity on different groups protected from discrimination under the Equality Act 2010. This is to consider if there are any unintended consequences for some groups from key changes made by a public body and their contractor partners organisations and to consider if the activity will be fully effective for all protected groups. It involves using equality information and the results of engagement with protected groups and others, to manage risk and to understand the actual or potential effect of activity, including any adverse impacts on those affected by the change under consideration.

For support with completing this Equality Analysis please contact corporate.core@bury.gov.uk / 0161 253 6592

SECTION 1 – RESPONSIBILITY AND ACCOUNTABILITY	
<i>Refer to Equality Analysis guidance page 4</i>	
1.1 Name of policy/ project/ decision	Awarding the Frozen Food Contract for the Schools Catering Service
1.2 Lead for policy/ project/ decision	David Catterall
1.3 Committee/Board signing off policy/ project/ decision	Cabinet
1.4 Author of Equality Analysis	<i>Name: David Catterall Role: Head of Commercial Services Contact details: d.catterall@bury.gov.uk</i>
1.5 Date EA completed	<i>15/04/24</i>
1.6 Quality Assurance	<i>Name: Lee Cawley Role: EDI Manager Contact details: l.cawley@bury.gov.uk Comments: EqlA complete – no further action required</i>
1.7 Date QA completed	<i>16/04/24</i>
1.8 Departmental recording	<i>Reference: Date:</i>
1.9 Next review date	

SECTION 2 – AIMS AND OUTCOMES OF POLICY / PROJECT	
<i>Refer to Equality Analysis guidance page 5</i>	
2.1 Detail of policy/ decision being sought	Awarding a Fresh Fruit and Vegetable Contract for Schools Catering
2.2 What are the intended outcomes of this?	To award Ralph Livsey Service the schools catering Fresh Fruit and Vegetable contract to ensure service delivery.

SECTION 3 – ESTABLISHING RELEVANCE TO EQUALITY & HUMAN RIGHTS		
<i>Refer to Equality Analysis guidance pages 5-8 and 11</i>		
Please outline the relevance of the activity/ policy to the Public Sector Equality Duty		
General Public Sector Equality Duties	Relevance (Yes/No)	Rationale behind relevance decision
3.1 To eliminate unlawful discrimination, harassment and victimization and other conduct prohibited by Equality Act 2010	Yes	The procurement of food for the school meal service must ensure that all suppliers included in the process are compliant and can provide food products to meet the need of the service users. During the process, the 'shopping list' includes a wide range of food items to meet these needs. If the preferred supplier cannot provide an element of the food provision an alternative supplier will be procured. All scoring during the procurement of food includes the social value as part of the EDI requirement linked to the Quality scoring.
3.2 To advance equality of opportunity between people who share a protected characteristic and those who do not.	Yes	The procurement of fresh fruit and vegetables via the YPO Framework does not impact the opportunity to progress equality either positively or negatively. During the procurement process, food items included within the non-exhaustive 'shopping list' includes the opportunity to supply frozen food which is halal and kosher compliant. Additional dietary requirements such as lactose and gluten have been included.
3.3 To foster good relations between people who share a protected characteristic and those who do not	Yes	The procurement of fresh fruit and vegetables via the YPO Framework which includes EDI policies supports the offer of diverse food to meet the needs and cultural requirements of people accessing the school meal service. During the procurement process, food items included within the non-exhaustive 'shopping list' includes the opportunity to supply food which can be served to all communities.
3.4 Please outline the considerations taken, including any mitigations, to ensure activity is not detrimental to the Human Rights of any individual affected by the decision being sought.		
<p>YPO, the framework used to procure the preferred supplier has a robust Equality and Diversity policy which all suppliers must adhere to be on their framework. Further information can be found here:</p> <p>file:///C:/Users/d.catterall/Downloads/IGov-Survey-Report-YPO-Public-Sector-Attitudes-to-Working-with-SME-Suppliers-Final%20(1).pdf</p> <p>Section 15 Social Responsibility covers equality and diversity responsibilities of suppliers</p> <p>https://www.ypo.co.uk/-/media/07d5dfffb084d431390cdc0d651bdc52e.ashx</p>		

SECTION 4 – EQUALITIES DATA			
<i>Refer to Equality Analysis guidance page 8</i>			
Protected characteristic	Usage / Service Users	Base data	Data gaps (to include in Section 8 log)
4.1 Age	Ages between Nursery Age and 18	Numbers on roll, held within the schools for each academic year group	No data gaps, due to considerable data from the schools and catering service management information. Data is continuously reviewed to ensure there are no gaps.
4.2 Disability	Fully accessible	Fully Accessible	No data gaps, due to considerable data from the schools and catering service management information. Data is continuously reviewed to ensure there are no gaps. Additional dietary requirements such as lactose and gluten have been included in the procurement
4.3 Gender	All Genders	No barriers	No data gaps, due to considerable data from the schools and catering service management information. Data is continuously reviewed to ensure there are no gaps.
4.4 Pregnancy or Maternity	N/A	N/A	N/A
4.5 Race	No barriers to access	No barriers	No data gaps, due to considerable data from the schools and catering service management information. Data is continuously reviewed to ensure there are no gaps.
4.6 Religion and belief	No barriers to access	No barriers	Schools provide robust and clear information

			around cultural belief and religion.
4.7 Sexual Orientation	No barriers to access	No barriers	N/A
4.8 Marriage or Civil Partnership	N/A	No barriers	N/A
4.9 Gender Reassignment	No barriers to usage	No barriers	N/A
4.10 Carers	No barriers to usage	No barriers to usage	Gaps in current data will be resolved with the public and staff consolation as it includes all protected characteristics
4.11 Looked After Children and Care Leavers	No barriers to usage	No barriers to usage. Additional support for Looked after children including Free School Meal provision and breakfasts clubs support access to the service.	No data gaps, due to considerable data from the schools and catering service management information. Data is continuously reviewed to ensure there are no gaps.
4.12 Armed Forces personnel including veterans	No barriers to usage	N/A	N/A
4.13 Socio-economically vulnerable	No barriers to usage	Support through Free School Meal provision supports access to the service.	No data gaps, due to considerable data from the schools and catering service management information. Data is continuously reviewed to ensure there are no gaps.

SECTION 5 – STAKEHOLDERS AND ENGAGEMENT

Refer to Equality Analysis guidance page 8 and 9

	Internal Stakeholders	External Stakeholders
5.1 Identify stakeholders	Schools Catering Staff	School Head Teachers and Business Managers / Suppliers
5.2 Engagement undertaken	None required	Procurement through YPO and suppliers
5.3 Outcomes of engagement	All catering staff, Operations Assistant Directors and Exec director fully aware. Procurement, Star Procurement, S151 officer and legal are fully aware via the cabinet report.	Suppliers who have not been successful have been made aware and can feedback. The awarded contractor has been made aware provisionally whilst the cabinet decision is ratified.
5.4 Outstanding actions following engagement. (include in Section 8 log)	The final Cabinet report and decision to award needs to be ratified and processed.	Official awarding of the contract must be communicated to the preferred supplier.

SECTION 6 – CONCLUSION OF IMPACT

Refer to Equality Analysis guidance page 9

Please outline whether the activity/ policy has a positive or negative effect on any groups of people with protected inclusion characteristics

Protected Characteristic	Positive/ Neutral Negative/	Impact (include reference to data/ engagement)
6.1 Age	Positive	By awarding the preferred contractor via the procurement exercise, the provision of the school meals service will be of a higher quality and of a lower cost. Improved quality increases uptake. Increased uptake of quality meals within a school setting supports better learning outcomes, improves wellbeing and impacts positively to reduce health inequalities.
6.2 Disability	Neutral	No direct impact however this will be reviewed during the process to ensure no demographic adversely impacted or disadvantaged. We will continue to review the process to ensure that no one is disadvantaged due to the protected characteristic. We will ensure that the process is fair and equitable, and any relevant adjustments will be made if any disadvantage is identified. Additional dietary requirements such as lactose and gluten have been included.
6.3 Gender	Neutral	No direct impact however this will be reviewed during the process to ensure no demographic adversely impacted or disadvantaged. We will continue to review the process to ensure that no one is disadvantaged due to the protected characteristic. We will ensure that the process is fair and equitable, and any relevant adjustments will be made if any disadvantage is identified.
6.4 Pregnancy or Maternity	Neutral	It is unlikely that this protected group will access the school meals service. However, if this occurred the school meals service will ensure an individual school meal provision is delivered in conjunction with parents / guardian, the pupil, social services and the school.
6.5 Race	Neutral	No direct impact however this will be reviewed during the process to ensure no demographic adversely impacted or disadvantaged. We will continue to review the process to ensure that no one is disadvantaged due to the protected characteristic. We will ensure that the process is fair and equitable, and any relevant adjustments will be made if any disadvantage is identified.
6.6 Religion and belief	Positive	During the procurement exercise all current religion and cultural requirements for school meal provision has been considered. If however, a further need is established the schools meal service can offer a bespoke solution in consultation with the school business manager, head teacher, parents / guardian and pupil where appropriate.
6.7 Sexual Orientation	Neutral	No direct impact however this will be reviewed during the process to ensure no demographic adversely impacted or

		disadvantaged. We will continue to review the process to ensure that no one is disadvantaged due to the protected characteristic. We will ensure that the process is fair and equitable, and any relevant adjustments will be made if any disadvantage is identified.
6.8 Marriage or Civil Partnership	Neutral	No direct impact however this will be reviewed during the process to ensure no demographic adversely impacted or disadvantaged. We will continue to review the process to ensure that no one is disadvantaged due to the protected characteristic. We will ensure that the process is fair and equitable, and any relevant adjustments will be made if any disadvantage is identified.
6.9 Gender Reassignment	Neutral	No direct impact however this will be reviewed during the process to ensure no demographic adversely impacted or disadvantaged. We will continue to review the process to ensure that no one is disadvantaged due to the protected characteristic. We will ensure that the process is fair and equitable, and any relevant adjustments will be made if any disadvantage is identified.
6.10 Carers	Positive	By awarding the preferred contractor via the procurement exercise, the provision of the school meals service will be of a higher quality and of a lower cost. Improved quality increases uptake. Increased uptake of quality meals within a school setting supports better learning outcomes, improves wellbeing and impacts positively to reduce health inequalities. Through support to access the service via Free School meal provision, it is likely carers will access the service more effectively.
6.11 Looked After Children and Care Leavers	Positive	By awarding the preferred contractor via the procurement exercise, the provision of the school meals service will be of a higher quality and of a lower cost. Improved quality increases uptake. Increased uptake of quality meals within a school setting supports better learning outcomes, improves wellbeing and impacts positively to reduce health inequalities. Through support to access the service via Free School meal provision, it is likely carers will access the service more effectively. Further support for care leavers will be required through Adult Care, where appropriate.
6.12 Armed Forces personnel including veterans	N/A	No direct impact however this will be reviewed during the process to ensure no demographic adversely impacted or disadvantaged. We will continue to review the process to ensure that no one is disadvantaged due to the protected characteristic. We will ensure that the process is fair and equitable, and any relevant adjustments will be made if any disadvantage is identified.
6.13 Socio-economically vulnerable	Positive	By awarding the preferred contractor via the procurement exercise, the provision of the school meals service will be of a higher quality and of a lower cost. Improved quality increases uptake. Increased uptake of quality meals within a school setting supports better learning outcomes, improves wellbeing

		and impacts positively to reduce health inequalities. Through support to access the service via Free School meal provision, it is likely those who are socio-economically vulnerable will access the service more effectively.
6.14 Overall impact - What will the likely overall effect of your activity be on equality, including consideration on intersectionality?	There will be an overall positive equality impact. All policies and Governance will be followed in accordance with agreed policies.	

SECTION 7 – ACTION LOG			
<i>Refer to Equality Analysis guidance page 10</i>			
Action Identified	Lead	Due Date	Comments and Sign off (when complete)
7.1 Actions to address gaps identified in section 4			
Gaps in data will be managed and reviewed. If additional information is gathered, the data will be included in the review / evaluation. A review of the process will continue throughout to ensure that no impact on people with protected characteristics or identified groups occurs	DC	1-4-2025	
7.2 Actions to address gaps identified in section 5			
A review of the process will continue throughout to ensure that no impact on people with protected characteristics or identified groups occurs.	DC	1-4-2025	
7.3 Mitigations to address negative impacts identified in section 6			
A review of the process will continue throughout to ensure that no impact on people with protected characteristics or identified groups occurs.	DC	1-4-2025	
7.4 Opportunities to further inclusion (equality, diversity and human rights) including to advance opportunities and engagements across protected characteristics			
No current action required			

<p>SECTION 8 - REVIEW</p> <p><i>Refer to Equality Analysis guidance page 10</i></p>
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Review Milestone	Lead	Due Date	Comments (and sign off when complete)
Op Dec to Procure	DC / AC	15-4-2024	Completed
Procure via Framework to ensure EDI policy is in place	AC	15-4-2024	Completed
Scoring to include social value and EDI underpinning	AC-Via YPO assurance	15-4-2024	Completed
Awarding of the contract following agreed governance	DC / AC	As approved via Cabinet	Equality Impact Assessment is part of the cabinet report to award the preferred contractor

Please make sure that every section of the Equality Analysis has been fully completed. The author of the EA should then seek Quality Assurance sign off and departmental recording.

SECTION 9 – QUALITY ASSURANCE		
<i>Refer to Equality Analysis guidance page x</i>		
Consideration	Yes/No	Rationale and details of further actions required
Have all section been completed fully?	Yes	
Has the duty to eliminate unlawful discrimination, harassment, victimization and other conducted prohibited by the PSED and Equalities Act been considered and acted upon?	Yes	
Has the duty to advance equality of opportunity between people who share a protected characteristic and those who do not been considered and acted upon	Yes	
Has the duty to foster good relations between people who share a protected characteristic and those who do not, been consider and acted upon	Yes	
Has the action log fully detailed any required activity to address gaps in data, insight and/or engagement in relation to inclusion impact?	Yes	
Have clear and robust reviewing arrangements been set out?	Yes	
Are there any further comments to be made in relation to this EA	EqIA is fully complete with no further actions required.	

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