

AGENDA FOR CABINET



Contact: Chloe Ashworth
Direct Line: 0161 253 5132
E-mail: c.ashworth@bury.gov.uk
Web Site: www.bury.gov.uk

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, 25 September 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 *(Pages 5 - 6)*

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, 23rd September. 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 20th September.

5 MINUTES *(Pages 7 - 16)*

Minutes from the meeting held on 04th September 2024 are attached.

6 CONTINUED SUPPORT FOR DISPLACED INDOOR MARKET HALL TRADERS OPERATING IN THE MILLGATE SHOPPING CENTRE *(Pages 17 - 30)*

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

7 DRAFT SUPPLEMENTARY PLANNING DOCUMENT 18 – DEVELOPMENT FRAMEWORKS FOR STRATEGIC SITE ALLOCATIONS AT ELTON RESERVOIR AND WALSHAW *(Pages 31 - 100)*

Report from the Leader and Cabinet Member for Strategic Growth attached.

8 HOLCROFT MOSS PLANNING OBLIGATIONS CONSULTATION DRAFT JOINT SUPPLEMENTARY PLANNING DOCUMENT *(Pages 101 - 128)*

Report from the Leader and Cabinet Member for Strategic Growth attached.

9 BIODIVERSITY STRATEGY *(Pages 129 - 192)*

Report of the Cabinet Member for Environment, Climate Change and Operations attached.

10 NORTHERN GATEWAY (GOVERNANCE / INVESTMENT ZONE / MDC)
(Pages 193 - 236)

Report of Leader and Cabinet Member for Strategic Growth attached.

11 DEVELOPER CONTRIBUTIONS FOR EDUCATION SUPPLEMENTARY PLANNING DOCUMENT-CONSULTATION DRAFT *(Pages 237 - 284)*

Report from the Leader and Cabinet Member for Strategic Growth attached.

12 DELIVERY OF A NEW SEMH SECONDARY SPECIAL SCHOOL - LAND PROPOSAL TO DEPARTMENT FOR EDUCATION (DFE) & OAK LEARNING PARTNERSHIP *(Pages 285 - 308)*

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

13 BURY ART MUSEUM *(Pages 309 - 316)*

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

14 CORPORATE PARENTING - ANNUAL ADOPTION REPORT *(Pages 317 - 350)*

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

15 PROCUREMENT OF LD2 SMOKE ALARM INSTALLATION PROGRAMME, IN RELATION TO FRA COMPLIANCE WORKS. *(Pages 351 - 354)*

Report from Cabinet Member for Housing Services attached.

16 2024/25 CORPORATE PLAN - SIX MONTH UPDATE *(Pages 355 - 380)*

Report from the Cabinet Member for Finance and Transformation attached.

17 Q1 FINANCE POSITION *(Pages 381 - 390)*

Report of Cabinet Member for Finance and Transformation attached.

18 UNIT 4 *(Pages 391 - 398)*

Report of Cabinet Member for Finance and Transformation attached.

19 ESTABLISHING A BURY LOCAL BEE NETWORK FORUM *(Pages 399 - 406)*

Report from Leader and Cabinet Member for Strategic Growth attached.

20 URGENT BUSINESS

Any other business which by reason of special circumstances the Chair agrees may

be considered as a matter of urgency.

21 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.

22 CONTINUED SUPPORT FOR DISPLACED INDOOR MARKET HALL TRADERS OPERATING IN THE MILLGATE SHOPPING CENTRE (PART B) (Pages 407 - 420)

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

23 NORTHERN GATEWAY (GOVERNANCE / INVESTMENT ZONE / MDC) (PART B) (Pages 421 - 450)

Report from Leader and Cabinet Member for Strategic Growth attached.

24 UNIT 4 (PART B) (Pages 451 - 452)

Report from the Cabinet Member for Finance and Transformation attached.

Question 1 relating to Item 6. Bury Indoor Market Hall – Continued Support for Traders

You are applying to have our funding withdrawn in March and state this gives us ample notice to negotiate a new lease with Millgate if we wish to do so. How can we make such a decision and it's a big one when we don't know the future of the indoor market? How can we negotiate when we don't know what's happening? Leaving us until December is not enough time for us.

Sofia Constantinou

The Market Hall feasibility study is almost completed, which identifies and reviews the 6 proposed options. The report will be brought to a future Cabinet for review. The report includes input from multiple stakeholders, including traders, and this will support the next steps for the Market Hall.

The Council have a real commitment to Bury Market as we acknowledge that it is an economic driver for the Town Centre, however the Indoor Market structure and offer needs a careful business planning examination. As stated when we launched, any option for the Market Hall, is likely to take 2-3 + years to develop and deliver, however, we do understand the need for progress given the disruption this unfortunate development of discovering RAAC has caused for both traders and the market team.

Question 2. relating to Item 6. Bury Indoor Market Hall – Continued Support for Traders

I am/was a market hall trader with my husband.

In recent articles in the local newspapers, you have managed to paint yourselves in an extremely benevolent way. Without wanting to sound rude - I would heartily disagree with this version of the facts. The package you put together was not a level playing field for all traders. It mattered not how many leases you held; how big your premises were - you were only entitled to the flat package. Add to this that it then became a lottery as to where you managed to relocate to and thus how much of the package you could access, it went from bad to down-right ugly.

On a personal note my question is - as we relocated ourselves and therefore had limited access to the package - and were in the Millgate and thus could not access the free rent - and were then promised we would receive this once we were back in the hall - now almost a year on and you are no further forward with making any progress or even attempting to get us into the hall - and don't even mention the schemes you've been hatching to knock it down and start again at which point we wouldn't be able to fit in there anyway! It is becoming blatantly clear that very few, if any, of the 49 traders will ever make it back into the hall. So, are you prepared to give those of us who have not had any free rent period our rent-free money in a lump sum? - in our case, based on the rent we paid faithfully every single month when in residence in the hall, that would equate to around £13K?

Karen Simpson

Bury Council have been very supportive of traders under very difficult circumstances. This has been echoed nationally through the National Market Traders Federation (NMTF) and National Association of British Markets (NABMA).

All traders were able to access the support packages and those who chose not to access them, did so of their own accord.

The packages available to traders were the most financially available at the time of the emergency situation and has supported traders to either relocate to new locations or arrange solutions for their own business with additional financial support.

All traders were encouraged to take advantage of the support packages, including the considerable support to operate in the Mill Gate.

The package included providing traders opting to operate in the Mill Gate a fully refurbished, compliant unit, with a further £3,000 to support relocation as well as paying rent comparable to their lease in the Market Hall.

The Market Team throughout this process have offered traders a wide variety of options for traders which has supported their trade under considerable challenges.

Although some traders were offered several options, some decided that solutions offered were not appropriate but were able to access a support fund of £3,500 to allow them to make their own arrangements.

The cost to the Council to support the traders operating in the Mill Gate is more than £268,000.

The decision on the future of the Market Hall has yet to be made, therefore the offer of the rent-free period to return to the Hall remains.

Traders are not being charged rent currently for their paused leases. We are unable to offer the financial equivalent of the value of the rent for traders who opt not to return to the Market Hall.

Minutes of: CABINET

Date of Meeting: 4 September 2024

Present: Councillor E O'Brien (in the Chair)
Councillors C Cummins, A Quinn, T Rafiq, L Smith, T Tariq,
S Thorpe and S Walmsley

Also in attendance: Councillors R Bernstein and M Smith
Lynne Ridsdale, Chief Executive
Jacqui Dennis, Monitoring Officer
Neil Kissock, Section 151 Officer
Linda Evans, Director of Social Care & Early Help
Steven Holden, Director of Education & Skills
Donna Ball, Executive Director of Operations
Will Blandamer, Executive Director (Health and Adult Care)
Rob Summerfield, Director of Regeneration and Project
Delivery
Adrian Crook, Director of Community Commissioning
Wendy Young, Head of Service
Karen Barrick, Head of Service
Julie Gallagher, Head of Governance

Public Attendance: 3 members of the public were present at the meeting.

Apologies for Absence: Councillor C Morris

CA.207 DECLARATIONS OF INTEREST

Councillor Tariq declared a personal interest in respect of agenda item 10 as the ward Councillor.

Councillor Rafiq declared a personal interest in respect of agenda item 9 as the ward Councillor.

CA.208 PUBLIC QUESTION TIME

Faye Nortly attended the meeting to raise concerns with regards to the Objections to the proposed disposal of Public Open Space, Land off Manchester Road/Radcliffe Road, Bury. Particular concern was raised in relation to the loss of green spaces and recreational facilities in a densely populated and deprived area. Has the Council undertaken any due diligence?

Responding, Councillor O'Brien reported, that the green spaces audit does state an overall deficit, in Bury East, this deficit is in natural and semi natural green spaces. However with regards to outdoor sports/parks and green spaces this accounts for 18 and 16 hectares respectively. The Leader reported that the Council are looking actively at spaces in Redvales and Bury East to add more playing/recreational capacity.

The Head of Land and Property reported that disposal will be subject to a further Cabinet report and any impact on the playing pitches will be addressed when an application is made for planning permission. With regards to the football pitches, the Council as a whole are

looking, to move away from lease arrangements to self-management arrangements to allow sports club to bid for Sport England funding.

CA.209 OBJECTIONS TO THE PROPOSED DISPOSAL OF PUBLIC OPEN SPACE – LAND OFF MANCHESTER ROAD/RADCLIFFE ROAD, BURY

Further to the published agenda the Chair, Councillor O'Brien agreed that this item would be considered first.

Councillor O'Brien reported that the report provides details of the objections received to the proposed disposal of Public Open Space (POS) of land off Manchester Road/Radcliffe Road, Bury, details of the areas affected were in the accompanying report.

Members discussed the disposal, the requirement to make land available for a new specialist educational provision, and the use of the land currently for recreational activities. Councillor Tariq, speaking as the ward Councillor, stated that he recognised the difficulties in balancing competing priorities. However he asked Officers to consider approaching the Department for Education to make them aware of the strong local opposition.

DECISION

Cabinet considered the responses received to the consultation and resolve to proceed with the disposal of the POS as shown edged red in Appendix 1, in the accompanying report.

Reasons for recommendations

The approval of the disposal of the POS will make the land available for the Council to dispose of for a new specialist education provision.

CA.210 MEMBER QUESTION TIME

There were no Member questions.

CA.211 MINUTES

It was agreed:

That the minutes of the meeting held on 16th July be approved as a correct record.

CA.212 HEALTH AND SAFETY ANNUAL REPORT

Councillor Rafiq Cabinet Member for Corporate Affairs and HR presented an annual Health and Safety Report.

This report sets out key health and safety activity over the preceding financial year alongside a summary of reported health and safety incidents and is presented to members for their comment and approval.

As part of the annual reporting process the Council's Health and Safety Policy is also reviewed and is also included for approval.

Additionally, in-line with the recommendations from an external review of Health and Safety arrangements conducted in 2023, the Council has developed a new 3-year Health and Safety Strategy which proposes a set of priorities for 2024-27 and is presented for approval.

DECISION -

Cabinet approves the 2023-24 Annual Health and Safety Report, revised Health and Safety Policy and Health and Safety Strategy for 2024-27.

Reasons for recommendation

To ensure continued compliance with health and safety legislation HSE best practice guidance and, ultimately, to support a safe working environment for staff and those who access Council services.

CA.213 ADULT SOCIAL CARE PERFORMANCE QUARTER ONE REPORT 2024/25

Councillor Tariq, Deputy Leader and Cabinet Member for Health and Wellbeing presented the Quarter 1 Report for 2024-25. 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.

Councillor Bernstein welcomed the report and the opportunity to meet with Adrian Crook, Director of Community Commissioning to discuss the report's content ahead of the meeting but did raise concerns with regards to data recording. Responding the Director of Community Commissioning reported that that systems have been put in place to monitor data recording and the information is rigorously monitored and if necessary investigated.

DECISION:

Cabinet notes the report.

CA.214 HOUSING ALLOCATION POLICY

Councillor Cummins, Cabinet Member for Housing Services, presented the an update on the recently reviewed Housing Allocations Policy. The Policy had been reviewed to reflect the changing legislation, aligned with guidance from the Ministry of Housing, Communities and Local Government on Social Housing Allocations and good practice sourced from the Housing Quality Network.

This work has been undertaken:

- To meet local needs for social housing.
- To maximise the use of Council Housing stock to meet increasing demands.
- To ensure that Council housing is allocated fairly and transparency to everyone with a Housing Need who meets eligibility criteria.
- To demonstrate the Council's commitment to its role as Corporate Parent when supporting the housing needs of our Children and Care Leavers.

This work has been independently reviewed via a commissioned external provider and has been consulted on with stakeholders, tenants, housing providers and other residents of the Borough.

Members discussed the establishment of a Common Housing Register. Phil Cole, Head of Service - Homelessness & Housing Options reported the establishment of the register will help to assist in allocating both Council and Housing Association properties as well as affordable homes.

DECISION

1. Cabinet approves the draft policy and commence formal consultation for a six week period.
2. Cabinet delegates authority to make any post-consultation amendments to the Cabinet Member for Housing in consultation with the Director of Law and Governance.
3. Cabinet commits to review the policy within 3 years.
4. Cabinet delegates minor legislative amendments to the Cabinet Member for Housing in consultation with the Director of Law & Governance.
5. Cabinet considered the implementation of a future common housing register for all registered housing providers that have stock within the Borough.

Reasons for recommendation(s)

The reasons for these recommendations are to ensure Bury has a policy that meets good practice and local demands and priorities. This Policy seeks to maximise the use of the Council's housing stock to meet current challenges to help manage and sustain local communities. A Common housing register to access all social and affordable housing within the Borough would benefit all people on our housing register and attempt to meet increasing demands.

CA.215 UPDATE ON THE ALPD (ACCELERATED LAND AND PROPERTY DISPOSALS) - PART A

The Leader presented an update on the ALPD (Accelerated Land and Property Disposals) which has been in operation following Cabinet approval on 24th November 2020. This report provides a rationale as to why some sites are to be withdrawn, under review and to be added to the programme and outlines the Future Assets Programme (FAP) with regards to disposals.

The Council Monitoring Officer reported that following discussions with Group Leaders and ward Councillors, North Block will be removed from the current report pending further consultation.

With regards to the Leigh Lane site in Walshaw, the Leader reports that the Council have not moved away from potentially siting a school on this site.

With regards to greater promotion of community asset transfer, the Leader reported that community asset transfer should be part of that process and consideration.

DECISION

1. Cabinet notes the progress of the ALPD to date.
2. Cabinet notes the Future Assets Programme and implications for disposal.
3. Cabinet approves the withdrawal of property assets for disposal set out in paragraph 20 below from the ALPD.

4. Cabinet approves the classification of property assets detailed at paragraph 21 below as surplus and to add to the ALPD property assets set out in Appendix 2.
5. Cabinet approves delegated authority to the Head of Land and Property to determine and agree terms for the sale of property assets in consultation with the s151 Officer, the Monitoring Officer, and the Exec Director (Place).
6. Cabinet approves the disposal of Spurr House, Pole, Unsworth.
7. Cabinet approves the establishment of the ATP (Asset Transformation Programme) to replace the ALPD.
8. Cabinet Notes the removal of North Block, Radcliffe from the proposed disposal sites, pending further consultation with Elected Members.

CA.216 NEIGHBOURHOOD HOUSING SUPPORT SERVICES - PART A

Councillor Tariq, Deputy Leader and Cabinet Member for Health and Adult Care reported that following the Cabinet report on the 4th April 2024, approval was given to the Community Commissioning Division to engage in a tendering exercise for supported accommodation and floating support for people that require housing related support.

After review and procurement, this further report requests the approval for the division to award two contracts- 1) Supported Accommodation and 2) Floating Support, both within Neighbourhood Housing Support Services.

Neighbourhood Support Housing Services provide short term, outcome focused interventions to vulnerable adults. These services will support individuals to build resilience and independence, improve health and wellbeing, ensure stability of accommodation, maximise income and support meaningful and economic activity.

Councillor Bernstein commended the department in re-negotiating a contract with an identified 4.7% saving.

DECISION

1. Cabinet agrees to award Adullam Homes a 4-year contract for Supported Accommodation
2. Cabinet agrees to award Calico Enterprise a 4-year contract for floating support
3. Cabinet agrees to enter a 4-year arrangement (1st October 2024- 31st September 2028) for both services, including a 1-year extension- subject to performance and review.
4. Cabinet agrees to delegate finalisation and sealing of these contracts including any clarifications to the Director of Law and Democratic Services in consultation with the Executive Director for Health and Care.

Reasons for recommendation(s)

There has been a significant increase in the number of single people that require tenancy related services and households that require interventions to sustain their tenancies. Rough sleeping and single homelessness has increased locally, due to numerous factors.

There is a need for supported accommodation for single people and floating support for households to reflect rising homelessness in the borough, regionally and nationally. 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.

A tendering exercise has been completed to reflect the award to Adullam Homes and Calico Enterprise, which delivers both quality and savings to the Council.

CA.217 CORPORATE PARENTING - ANNUAL FOSTERING REPORT

Councillor Lucy Smith, Deputy Leader and Cabinet Member for Children and Young People presented to Cabinet the Annual Fostering report.

DECISION

Cabinet note the information provided within the annual report.

Reasons for recommendation

Requirement of the Fostering Regulations to note information within the report.

CA.218 CORPORATE PARENTING STRATEGY

Councillor Lucy Smith, Deputy Leader and Cabinet Member for Children and Young People presented to Cabinet the Corporate Parenting Strategy.

DECISION

Cabinet approves the Bury Corporate Parenting Strategy 2024-2026.

Reasons for recommendation

Approval of this Strategy will ensure that the Council has a current strategy in place to influence partnership working and support improved outcomes for our children and young people.

CA.219 BURY LOCAL AREA SEND RESPONSE TO LOCAL AREA INSPECTION

Councillor Lucy Smith, Deputy Leader and Cabinet Member for Children and Young People presented to Cabinet Bury Local Area SEND response to local area inspection. The Cabinet member reported between the 12th and 16th February, Bury's local area SEND services were inspected by the Care Quality Commission and Ofsted.

The inspection team identified widespread, systemic failings in services and highlighted the challenge that we need to do more to improve the outcomes of children and young people with special educational needs. The inspection identifies 6 priority actions which Bury Council and NHS Greater Manchester ICB are jointly responsible for, along with 3 areas for improvement. As a result of the inspection outcome, the local authority will be issued with an Improvement Notice, and we will be subject to monitoring visits followed by a re-inspection in approximately 18 months.

Members discussed the difficulties in recruitment in Childrens Services. The Cabinet member reported that she remained confident that the Department will be able to recruit as well as

providing the other identified support including training and improved communication with relevant stakeholders.

DECISION

1. Cabinet notes the findings of the local area inspection and the Priority Impact Plan.
2. Cabinet notes
 - A review is being conducted of Educational Psychology Services, and Cabinet will receive this update via a separate report.
 - A comprehensive and effective Outreach offer is being reviewed and codesigned, in accordance with current capacity to determine service delivery that is aligned with our strategic objectives, and which addresses our challenges. This service has recently been restructured and is considered sufficient at this time.
 - Further exploration of the Liquid Logic SEND Portal is required to establish functionality and efficiencies and consider how it can support our identified issues. Data cleansing is currently underway to migrate the information to the data system and the anticipated timeframe for completion is December 2024.
 - The SEND Assessment and Review Team comprises of staff with varying knowledge, experience and skills. There is a need for a core programme of training and development to support Continued Professional Development (CPD) and improve service delivery.
3. Cabinet approves the proposals in respect of the additional capacity required to deliver on the Local Area SEND Partnership Priority Impact Plan and Project Safety Valve (PSV) Agreement:
 - a. Additional capacity in the SEND Service
 - b. Designated Social Care Officer (DSCO)
 - c. Training costs
 - d. Project management

Reasons for recommendation(s)

- To ensure Cabinet Members are sighted on progress of SEND improvement activity following the local area inspection.
- To ensure that the SEND Service can deliver on Local Area SEND Partnership Priority Impact Plan, PSV Action Plan and meet the expectations of DfE, Ofsted and CQC as part of their ongoing monitoring arrangements.
- To ensure compliance with the Education, Health and Care Needs Assessment, in accordance with the Childrens & Families Act 2014, SEND Regulations 2014 and the SEND Code of Practice 2014.

CA.220 TREASURY MANAGEMENT

Councillor Thorpe, Cabinet Member for Finance and Transformation
Presented the Treasury Management report.

The report outlines the financial position and provides an update on the following aspects of the Treasury Management function throughout 2023/24.

- An economic update for 2023/24.
- An update of the Council's current treasury management position.
- Council Borrowing.
- Treasury Investment Activity.
- Non-Treasury Investments.
- Treasury Performance for 2023/24.
- Treasury Management Prudential Indicators.

The Council is required by legislation to produce an annual Treasury Management review of activities and the actual prudential and treasury indicators for the year. This report meets both the CIPFA Code of Practice on Treasury Management (the Code) and the CIPFA Prudential Code for Capital Finance in Local Authorities (the Prudential Code).

DECISION

1. Cabinet notes and approves for onward submission to Council on 11 September 2024, the:
 - o 2023/24 Prudential and Treasury Indicators.
 - o Treasury Management 2023/24 Outturn Report.

Reasons for recommendation(s)

It is a requirement of the CIPFA Code that the Council receives an annual Treasury Management Outturn Report. It should be noted that the Council met all its Prudential Indicators relating to Treasury Management in financial year 2023/24.

CA.221 FOR INFORMATION - APPOINTMENTS UPDATE

CA.222 FOR INFORMATION - 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 14th June 2024 be noted.

CA.223 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.224 UPDATE ON THE ALPD (ACCELERATED LAND AND PROPERTY DISPOSALS) - PART B

DECISION

1. Cabinet adds the property asset Spurr House, Pole Lane, Unsworth to the ALDP (refer to Part A paragraph 23)
2. Cabinet notes the informal tender exercise.
3. Cabinet approves the sale of Spurr House to the preferred bidder, namely Watson Land Ltd.

4. Cabinet delegates the signing of all contracts required to complete the sale to the Director of Law and Democratic Services in consultation with the Executive Director (Place).

Reasons for recommendation(s)

The property asset is to be added to the ALPD after a Cabinet Report 13/12/2023 detailing the site is no longer required for the relocation of the PRU (see also Part A paragraph 25)

The property asset is empty, and the Council has ongoing holding costs. The sale of this property asset would reduce the ongoing holding costs, generate a capital receipt and bring forward the site for redevelopment.

CA.225 NEIGHBOURHOOD HOUSING SUPPORT SERVICES - PART B

DECISION:

1. Cabinet awards Adullam Homes a 4-year contract for Supported Accommodation at £1,616,290.28
2. Cabinet awards Calico Enterprise a 4-year contract for floating support at £2,221,080.72
3. Cabinet approves the entering into of a 4-year arrangement (1st October 2024- 31st September 2028) for both services, including a 1-year extension- subject to performance and review.
4. Cabinet delegates finalisation and sealing of these contracts including any clarifications to the Director of Law and Democratic Services in consultation with the Executive Director for Health and Care.

Reasons for recommendation(s)

- Refer to report- Part A Tender of Neighbourhood Housing Support Services and Supported Accommodation and Floating Support Services

COUNCILLOR E O'BRIEN
Chair

(Note: The meeting started at 6:00pm and ended at 8:00pm)

This page is intentionally left blank



Classification:
Open

Decision Type:
Key

Report to:	Cabinet	Date: 25 September 2024
Subject:	Part A - Bury Indoor Market Hall – Continued Support for Traders	
Report of	Cabinet Member for Culture, Economy and Skills	

1. Summary

In October 2023 Bury Indoor Market was closed due to the discovery of Reinforced Aerated Autoclaved Concrete (RAAC) which posed a significant Health and Safety risk.

Following the closure, 49 Traders (62 Units) who operated within the hall were either relocated, had their units reconfigured to continue operating, or arranged alternatives for their business.

A considerable amount of emergency support was given by the Council to traders ranging from financial support to mental health awareness and access to wider business support.

During the consultation with traders, the Mill Gate shopping centre became a viable relocation opportunity. Bury Council and Bruntwood had recently entered a Joint Venture to purchase the Mill Gate as part of the wider regeneration plan for Bury.

Traders moving into the Mill Gate Shopping Centre were advised they would receive 2 weeks rent-free and then they would pay their equivalent rent based on their original unit within the Market Hall.

Bury Council committed to pay all utilities, service charges, business rates and BID levies for traders occupying the Mill Gate Shopping Centre.

By committing to this support, the traders that are now operating within the Millgate Shopping Centre are receiving continued financial support, which is over and above their rent and service charge

The cost to the Council for the Indoor Market Traders to occupy and operate within the Mill Gate Shopping Centre is forecast as £268,300.00.

The level of support is unsustainable and is creating increased budget pressures on Bury Council.

The traders were advised that the support would be revisited and reviewed in 12 months. As traders were not relocated together, the date when the 12 months expires varies considerably.

2. Recommendation(s)

It is proposed that traders operating within the Mill Gate Shopping Centre be given notice that the support they are receiving ends in March 2025. This will allow traders time to either negotiate with the Mill Gate Shopping Centre for a formal lease or to consider alternatives, for example, relocation.

It is recommended that the total cost of the emergency response to the closure of the Indoor Market Hall is approved by the Cabinet as it is now over £500,000.00 which deems it a key decision.

3. Reasons for recommendation(s)

Although Bury Council is committed to Bury Market and the continued development of the Town Centre, continued support for a small number of relocated traders operating within the Mill Gate will create a considerable ongoing strain on Council budgets.

Continued financial support for relocated Market Traders operating within the Mill Gate creates inequity for Mill Gate retailers.

The continued support cost could be utilised to deliver the preferred option of the Market Hall feasibility study.

Any decision in relation to an executive function which results in the council incurring expenditure which is, or the making of savings which are, significant having regard to the council's budget for the service or function concerned, in this case, the expenditure in excess of £500,000.00, is deemed as a key decision and must be approved by Cabinet.

4. Alternative options considered and rejected

Continued financial support to the market traders operating in the Mill Gate was considered, however, this creates ongoing budget pressures, with limited means to mitigate any overspending relating to this within Council budgets.

Relocation support for Mill Gate traders to Bury Open Market was also considered, however occupancy within the Market is at 100%. Units that become available over the notice period will require reconfiguration, which costs cannot be covered by Bury Council, as it would create further budget pressures and be perceived as inequitable.

The option of giving 3 months' notice to vacate the Mill Gate premise in line with the terms of the lease, or 4 weeks' notice to terminate the licence agreement between the Licensor and Licensee were considered. These options would not give the trader sufficient time to consider their position and explore alternatives with the support of Markets and Mill Gate Management.

Report Author and Contact Details:

Name: David Catterall

Position: Head of Commercial Services

Department: Operations

E-mail: d.catterall@bury.gov.uk

5. Background

5.1 RAAC discovery

Bury Indoor Market forms a vital component of the Bury Town Centre retail core. It hosted a six-day-per-week market and functioned alongside other important facilities such as the popular outdoor market (3 days per week operation) and the Meat & Fish Hall (6 days per week operation).

The building is well regarded and is seen by some as a classic modernist structure, featuring a gull-winged roof. The building is over 50 years old.

Reinforced, Autoclaved Aerated Concrete (RACC) is a type of building material that has been used in the construction of several schools across the UK and some social housing in Scotland.

If buildings are found to contain RAAC the Government's advice is that they may need to be closed immediately on health and safety grounds due to the risk of collapse. This advice was not known in the 1970s when many buildings were constructed using RAAC.

Advice was issued to all Local Authorities from Whitehall in September 2023 to check all schools and then all other buildings for RAAC and to close any building immediately that is found to be built with RAAC.

In October 2023, following an initial building survey by Pick Everard LTD, RAAC was found in the loading bay roof and the main roof of Bury Indoor Market, and due to the Health and Safety Risk it was necessary to close the Market Hall, affecting 49 traders.

Once RAAC had been discovered, from the initial survey to determine the existence of RAAC and possible Health & Safety risk, the Council procured Pick Everard LTD formally to compile a more detailed condition report of the Indoor Market Hall. The report covered the following:

- Roofs
- External Elevations
- Internal Areas – fabric

- Structural Matters
- Mechanical, Electrical & Plumbing (MEP)

The cost associated with the emergency response is highlighted in section 5.5

5.2 Relocation and Compliance

The process to relocate the 49 traders who operated within the Hall was started and all were relocated elsewhere in the open Market, the Mill Gate shopping centre, or decided to find their own alternative solution.

- 49 Traders (62 Units) were affected.
- 16 Units reopened in their current perimeter locations of the indoor market hall after consultation with Building control.
- 2 Units were able to open a week after the closure, as entrances to the market hall were reconfigured to allow for trading.
- 8 Traders opted to operate in the open market and on pop-up stalls.
- 7 Traders were relocated to Council owned property on Princess Parade. These have now vacated to the Open Market or Mill Gate units ahead of the flexi-hall construction.

The remaining traders were relocated to the Mill Gate shopping centre. This was facilitated and supported through Bury Council and Bruntwood's joint venture which is the owner of the Mill Gate and in place to redevelop and regenerate the Mill Gate estate within the town centre.

To facilitate the continuation of trade, a relocation strategy was agreed alongside Bruntwood, the Joint Venture partners and asset managers for the Mill Gate. This agreement enabled the council to take 12-month leases.

The leases were agreed with the flexibility to enable the council to exercise a break option upon 3 months' notice should the space no longer be required for the market traders. Further suitable retail units were leased as and when available and ready for occupation.

The agreement with the joint venture, enabled Bury Council, through the Markets Management Team to sub-let the units to individual traders.

The Markets Management team were then able to continue to manage the traders under Bury Market's terms and conditions.

Whilst investigating alternative locations within the Mill Gate shopping centre, many of the vacant units were found to be non-compliant.

To expedite the relocation, the Market management team worked with Property Services, the Mill Gate Management team and compliance teams within Operations to create a work program to ensure compliance checks for all vacant units could take place.

The units must be compliant before that can be deemed suitable for occupation. The responsibility for each area of compliance varies from the landlord, tenant and sub-let tenant. Bury Council funded and facilitated all the compliance checks and remedial works for the units.

The requirements for compliance are:

- Portable Appliance Testing (PAT).
- Fire Risk Assessment (FRA)
- Water Risk Assessment / Legionella Check
- EICR / Electrical Condition inspection
- Fire Sprinkler System Service Inspection
- Fire Detection and Alarm System Service Inspection
- Fire Extinguisher Service Inspection
- Asbestos Survey
- Cooking Equipment and Extract Ducting Service Inspection
- Rodent Inspection

Mill Gate Management figures provided for the trader relocation period show an average year on year increase in footfall of 0.7%. The average monthly footfall was 916,000, peaking on Full-Market days by 40%, validating that Market visitors also spend time within the Mill Gate estate where relocated traders have been trading.

Market footfall stands at an estimated 600,000 per month, with an increase of 20% in coach visitor numbers vs 2023.

5.3 Trader Financial Support

A range of Emergency Financial support measures were made available to traders to help them through the initial period of disruption.

Additional non-financial support was provided including benefits advice, free one-to-one business and personal finance advice, access to the hardship fund, the offer of reduced Council tax (where eligible) and debt advice. Support was also given via the Health Assured Employee Assistance programme which offered sessions to manage stress and anxiety and support good mental health.

The initial emergency financial offers:

- £300 food and fuel payment (given via the faster payment process to ensure same-day payment).
- £100 Council Tax credit (if the trader resided in the borough of Bury and paid Council Tax to Bury Council).
- Access to a benefits calculator (to determine eligibility for Universal Credit/Council Tax support)
- Reduced Council Tax payments or exemptions (where eligible)

As the situation progressed, a discretionary fund was set up to enable traders to access one of two options:

1. Access to £3000.00 to support the relocation of the trader to a location within the Mill Gate or within Bury Market.
2. Access to £3,500.00 to support the traders' own efforts to relocate to an alternative location outside of the Mill Gate or Bury Market.

Each trader was also advised that rent for each of their leases, service charge and any utilities held within the Market Hall would be frozen until the Market Hall reopened, or an alternative option for the Indoor Market Hall was considered and agreed upon.

Traders who opted to relocate within the market footprint were given a 12-week rent-free period after which were required to pay the rent or daily licence of the new location they were operating from, or the rent of their original lease, whichever was lower.

Traders who opted to relocate to a Mill Gate unit were offered a two-week rent-free period upon relocation, after which they would be required to pay the equivalent cost of their lease within the Market Hall. On return to the Market Hall, a further 11 weeks rent-free period would be offered. The Council pays all other axillary costs such as business rates, service charges and BID levy whilst operating in the Mill Gate.

Traders who opted to access £3,500.00 will also be offered a 13-week rent-free period on their return to the Market Hall, or if an alternative option was considered and agreed upon.

5.4 Financial Commitment

The costs associated with the emergency response are wide-ranging. There are costs associated directly with examples including building works and trader support, however, what cannot be quantified is the amount of officer time from across all directorates of Bury Council, including Corporate Core, BGI and Operations which supported the emergency response.

5.5 Emergency response cost

The forecast cost to Bury Council due to expenditure, trader support, to March 2025 is as follows:

	Category	
Building	Building costs including survey/compliance costs etc	£118,000.00
Other	Utility costs £88.5k, Shutter payments £10.0k, Room hire £1.0k	£99,500.00
Support	Support Payment taken up @ £3,500 per trader	£52,500.00
Relocation	Relocation Support payments	£88,180.00
Storage Discount for Traders	To be funded from Bury Market Revenue Account	£156,000.00
Building Capital Costs	Costs which meet capitalisation criteria, including buildings	£289,000.00
Total Expenditure		£803,180.00

Although the total cost includes costs associated with all traders impacted by the market hall closure, there are specific costs to Bury Council due to traders occupying the Mill Gate Units.

Total occupancy cost for Bury Council for units associated with relocated Market Traders within the Mill Gate are as follows:

	Occupancy Costs for Bury Council Leased Units
Rent	£48,635.00
Rates	£120,353.00

Service Charge	£94,150.00
Insurance	£5,197.00
Occupancy Costs	£268,335.00

Although relocated market traders operating from the Mill Gate are recipients of subsidies to operate in the Mill Gate Units, rent and utility costs are being collected.

The breakdown of income generated is:

	Rent and Utilities charged to traders
Rent / Sub-lease	£86,600.00
Utilities	£19,000.00
Total Income	£105,600.00

Total Cost to Bury Council of Support for Market Traders to continue to operate within the Mill Gate to 31 March 2025:

£162,735.00

5.6 Communications Plan

The decision to cease or change any financial support for the market traders operating within the Mill Gate since the relocation requires a strong, clear, and transparent communications plan.

The traders were advised on Tuesday 5th December 2023, at an Indoor Market Trader briefing, held with support from the NMTF (National Market Traders Federation), that the financial support would be reviewed after 12 months of the relocation.

Working with Bury Council's communications team a comprehensive communications plan has been compiled to ensure that traders are fully informed as well as other stakeholders including Bruntwood, Millgate Management and the Joint Venture.

Briefly, however, the communications plan recognises that regular communication and ongoing dialogue have been maintained with all traders impacted by the indoor market hall closure, wider market traders and other key town centre.

However, if the Cabinet approve to end the financial support package, direct communication with the relevant traders will be activated via:

- Group trader briefing

- One-to-one meetings
- Email (to formally confirm the end date for the support and other auxiliary matters)

Internally the Cabinet members will be fully briefed as part of the governance process and this information will be disseminated to ward councillors.

Markets Management team has engaged informally with all impacted traders before the Cabinet meeting takes place.

Following on from Cabinet, each trader will be briefed further on the outcome of the meeting and will have the opportunity of a one-to-one meeting with the Market's Management team, with formal details being confirmed by email and letter.

5.7 Wider town centre stakeholders

- Mill Gate Shopping Centre Management Team
- Bruntwood / Joint Venture

The Millgate and Bruntwood have been updated before the Cabinet meeting informally and then will be formally advised following the Cabinet decision. A meeting with Bury Council and the Joint Venture will be held if the decision is taken to cease the current financial support.

This will initiate traders impacted to speak to Bruntwood and the Mill Gate if they decide to continue to operate within the Millgate on their terms and conditions.

The key messages are:

- Bury Council remains committed to Bury Market and has not taken this decision lightly.
- Bury Council recognises the vital role of the market in bolstering the town centre economy.
- This is a decision taken in the context of Bury Council's limited funds and significant budget pressures from other service areas, particularly children's and adults' social care.
- The cost of the RAAC Emergency with the Indoor Market Hall, including the relocation of traders, has cost more than £952,000.
- The Council is committing to maintain the current financial support package for a further 6 months, including over the Christmas period and throughout the slower trading period at the start of the year.

- Planning to end the financial support in March 2025 allows six months for traders to consider their position and explore any alternatives should they choose to.
 - Over the next 6 months, the Bury Market Management Team will assist traders who may wish to look at options to trade within Bury Market, where possible.
-

6. Links with the Corporate Priorities:

Please summarise how this links to the Let's Do It Strategy.

Local – Ending the financial support for the relocated market traders operating within the Millgate Shopping Centre will ensure there is equity for all retailers operating within the Millgate Shopping Centre. This allows for the Joint Venture to implement the Town Centre Master plan which includes carbon reduction.

Enterprise – Ensuring equity with Millgate traders and retailers means that Bury Council are not continuing to financially support businesses. It will give traders the opportunity and time to consider better sustainable options for their businesses. Traders will have access to support through the Business Growth Hub and DWP.

Together – Listening to a wide range of stakeholders has supported the decision to cease the financial support. This brings equity to all those operating within the Millgate and will allow businesses to assess their position to ensure they can remain sustainable and viable where possible.

Strength-based approach – Working with traders and being transparent will ensure that decisions are made which will consider the wider population and the Town Centre plan.

7. Equality Impact and Considerations:

*Please provide an explanation of the outcome(s) of an initial or full EIA and make **specific reference regarding the protected characteristic of Looked After Children**. Intranet link to EIA documents is [here](#).*

A full EIA has been completed which shows a low impact on traders, with mitigations in place to reduce risk, including business support and a 6 month notice period.

8. Environmental Impact and Considerations:

There are no environmental impacts to consider.

*Please provide an explanation of the Environmental impact of this decision. Please include the impact on both **Carbon emissions** (contact climate@bury.gov.uk for advice) and **Biodiversity** (contact c.m.wilkinson@bury.gov.uk for advice)*

9. Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
<p>Reputational damage to the Council due to lack of understanding among traders as to why the financial support cannot continue.</p>	<p>Pro-active communications with all parties, including traders and press/media.</p> <p>Communications will explain the council's budget position and that public money cannot be used indefinitely to support private businesses.</p> <p>Traders will be offered support through the Business Growth Hub and DWP.</p>
<p>The decision to cease support to this trader group could be viewed as a lack of support for the future of the market as a whole</p>	<p>Communications to reference the council's wider regeneration and growth plans that will help to anchor the future of the market, e.g.:</p> <ul style="list-style-type: none"> - The market regeneration project which includes improvements to the outdoor market and the development of a flexi-hall - The Council's Joint Venture with Bruntwood to redevelop Mill Gate.

10. Legal Implications:

The financial support provided to traders was done so in the public interest, in response to the unforeseen necessity to close the indoor Market Hall. The intention of the support was limited to facilitating the continued operation of the effected traders. In this regard the support has been effective. It is some 11 months since the Hall was closed. It is necessary for the Council to review whether it remains appropriate and in the public interest to continue with this or any further financial support to the affected traders. It is important that the affected traders are not unfairly advantaged by any financial support offered by the authority. The Council's overall financial position and the competing demands on resources is a relevant consideration when making this assessment.

The financial support to affected traders is a subsidy within the meaning set out in the Subsidy Control Act 2022. Section 2 of the Act defines a subsidy as being financial assistance given directly or indirectly from public resources by a public authority, confers an economic advantage on one or more enterprises, is specific in that it creates an economic advantage and has, or is capable of having, an effect on competition or investment within the United Kingdom. However, the level of financial support provided to each trader has been judged to fall within the limit of minimal financial assistance set by the Act, currently £315,000, which can lawfully be received by a recipient of a subsidy over the current and two immediately preceding financial years.

11. Financial Implications:

The costs incurred to date are detailed in the body of the report and have been met from non-recurrent funding. Continued financial support into the 2025/26 financial year would represent an additional financial pressure and increase the funding gap within the medium-term financial strategy.

12. Appendices:

Please list any appended documents.

Background papers:

Bury Town Centre Master Plan - <https://www.bury.gov.uk/planning-building-control/regeneration/bury-town-centre>

Please list any background documents to this report and include a hyperlink where possible.

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

Term	Meaning
RAAC	Reinforced Aerated Autoclaved Concrete
BID	Business Improvement District
PAT	Portable Appliance Testing
FRA	Fire Risk Assessment

EIA	Equality Impact Assessment
Joint Venture	The agreement between Bury Council and Bruntwood to own and operate the Mill Gate Shopping Centre for economic development through regeneration.
Service Charge	An overhead cost is placed on traders to cover services such as waste removal and communal area cleaning.
DWP	Department of Work and Pensions
BGI	Business Growth and Infrastructure Team within Bury Council

This page is intentionally left blank



Classification: Open	Decision Type: Key
--------------------------------	------------------------------

Report to:	Cabinet	Date: 25 September 2024
Subject:	Draft Supplementary Planning Document 18 – Development Frameworks for Strategic Site Allocations at Elton Reservoir and Walshaw	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1. Draft Supplementary Planning Document (SPD) 18 (see Appendix 1) supports policies relating to Bury's strategic site allocations at Elton Reservoir (Policy JPA7) and Walshaw (Policy JPA9) of the Places for Every Joint Plan (PfE) which was adopted in March 2024.
2. A key requirement of the PfE policies for the Elton Reservoir and Walshaw sites is that any proposals for these allocations must be in accordance with a comprehensive masterplan that has been approved by the Local Planning Authority (LPA) and that it shall include a clear phasing strategy.
3. Draft SPD18 sets out more detailed guidance on what the Council will expect in terms of this specific requirement of the PfE policies for the Elton Reservoir and Walshaw strategic site allocations. In particular, SPD18 requires the masterplans and phasing strategies are supported by detailed evidence to justify the approach and that this is presented collectively as a Development Framework for each site. It is intended that these Development Frameworks be approved as SPDs in their own right so that they will be a material consideration in the decision-making process for subsequent planning applications.
4. Members are therefore being asked to approve the draft SPD18 for a six-week period of consultation in order to establish stakeholder views on its content. Following consultation, all representations received will be fully considered and changes made where appropriate before the SPD is brought back to Cabinet for approval to adopt.

Recommendation(s)

5. It is recommended that Cabinet:

- i. Approves draft Supplementary Planning Document 18 – Development Frameworks for Places for Everyone Strategic Site Allocations at Elton Reservoir and Walshaw attached at Appendix 1 for a six-week public consultation commencing no earlier than 15 October 2024; and
- ii. Delegates approval to the Executive Director of Place to make minor non-material editorial amendments to draft Supplementary Planning Document 18 – Development Frameworks for Places for Everyone Strategic Site Allocations at Elton Reservoir and Walshaw before consultation commences.

Reasons for recommendation(s)

6. To ensure that stakeholders have an opportunity to have their say on the draft SPD.

Alternative options considered and rejected

7. To not approve the SPD for consultation. This would prevent stakeholders commenting on the SPD and would result in the future adoption of the document being contrary to planning regulations.

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

Background

8. Supplementary planning documents (SPDs) are non-statutory documents prepared in consultation with the local community. They build upon and provide more detailed advice or guidance on policies in an adopted development plan. They can be used to provide further guidance for development on specific sites, or on particular issues.
9. As they do not form part of the development plan, SPDs cannot introduce new planning policies into the development plan. However, they are a material consideration in decision-making.
10. Following its adoption on 21 March 2024, the Places for Everyone Joint Development Plan (PfE) became a key part of Bury's statutory development

plan alongside the saved policies of the Unitary Development Plan (UDP) and the Greater Manchester Joint Minerals and Waste Plans. The Council is currently progressing a new Local Plan which, once adopted, will replace the saved policies of the Bury UDP.

11. PfE is a long-term plan of nine Greater Manchester districts (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford and Wigan) for jobs, new homes, and sustainable growth. One of the key purposes of PfE is to identify the amount of new development needed across the 9 districts and strategic site allocations that would help to meet these needs. This includes strategic site allocations for housing in Bury at Elton Reservoir (PfE Policy JPA7) and Walshaw (PfE Policy JPA9). There are also cross-boundary allocations at the Northern Gateway where the Council are working jointly with Rochdale Council on these sites.
12. A key requirement of the PfE policies for the Elton Reservoir and Walshaw sites is that any proposals for these allocations must be in accordance with a comprehensive masterplan that has been approved by the Local Planning Authority (LPA) and that it shall include a clear phasing strategy as part of an integrated approach to the delivery of infrastructure to support the scale of the whole development in line with PfE Policy JP-D1 'Infrastructure Implementation'.
13. This requirement is a critical stage in providing a 'bridge' between the sites' allocation in PfE and subsequent planning consent.

Scope and content of the draft SPD

14. Draft SPD18 sets out more detailed guidance on what the Council will expect in terms of this specific requirement of the PfE policies for the Elton Reservoir and Walshaw strategic site allocations. In particular, SPD18 requires the masterplans and phasing strategies are supported by detailed evidence to justify the approach and that this is presented collectively as a Development Framework for each site. It is intended that these Development Frameworks be approved as SPDs in their own right so that they will be a material consideration in the decision-making process for subsequent planning applications.
15. Chapter 2 of the draft SPD sets out the relevant national planning policy and guidance that supports the Council's approach as well as highlighting the various documents that make up Bury's current development plan.
16. Chapter 3 of the draft SPD then sets out generic advice that is applicable to the Development Frameworks for both the Elton Reservoir and Walshaw sites. In particular, the generic advice sets out:
 - The purpose of the Development Framework;

- The proposed status of and approval mechanisms for the Development Framework;
 - The benefits of collaborative working between the Council and site promoters/developers/landowners, including Planning Performance Agreement and equalisation agreements;
 - Potential methods of infrastructure funding;
 - The benefits of effective community and stakeholder engagement;
 - The need for an Environmental Impact Assessment for the whole of each site; and
 - The expected scope and content of the Development Framework.
17. Chapters 4 and 5 of the draft SPD set out the site-specific advice for the Elton Reservoir and Walshaw sites respectively, including the development plan policies that are relevant to each site and the key requirements for the developments, such as sustainable transport and highways infrastructure, affordable housing provision, education provision, ecological considerations, biodiversity net gain, heritage considerations, recreation provision, flood risk considerations, Green Belt compensation and design.

Consultation and adoption

18. 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.
 - Made available for inspection, at a Council's principal office and at other places within its area as the local planning authority consider appropriate, during normal office hours.
 - Made available as an online copy.
19. 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. Consultation will also be advertised via The Council's social media channels.

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

Links with the Corporate Priorities:

21. Places for Everyone forms part of Bury's statutory development plan. It sets out statutory policies and strategic site allocations that will guide future growth and development in the Borough. A key part of the Plan is to rebalance the Greater Manchester economy by significantly boosting the economic output from the north through the delivery of new housing and employment that will benefit both Bury and its residents. The 'Let's Do It' strategy specifically refers to Places for Everyone as having a key role to play in the delivery of its objectives and priorities.

Equality Impact and Considerations:

22. The attached Equality Impact Assessment concludes that there are no negative impacts on equality and a positive impact recorded.

Environmental Impact and Considerations:

23. The development of the PfE strategic housing allocations at Elton Reservoir and Walshaw will need to be in accordance with relevant PfE policies, including Policies JP-S2 (Carbon and Energy) and JP-G8 (A Net Enhancement of Biodiversity and Geodiversity). The draft SPD highlights that these policies are relevant to the development of these sites and will need to be considered through the preparation of the respective Development Frameworks.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Stakeholders do not engage in the consultation on the draft Supplementary Planning Document	The SPD is being prepared in accordance with the Town and Country Planning (Local Planning) (England) Regulations 2012 which are reflected in the Council's Statement of Community

	Involvement. However, the consultation process will be kept under review and will be adjusted if additional stakeholder engagement is required.
--	---

Legal Implications:

24. The statutory requirements for the preparation of SPDs are set out in the Town and Country Planning (Local Planning) (England) Regulations 2012 and paragraphs 19 and 20 of this report set 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:

25. There are no financial implications arising directly from this report.

Appendices:

Appendix 1 - Draft Supplementary Planning Document 18 - Development Frameworks for Strategic Site Allocations at Elton Reservoir and Walshaw

Background papers:

[Places for Everyone Joint Development Plan \(adopted March 2024\).](#)

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

Term	Meaning
SPD	Supplementary Planning Document
PfE	Places for Everyone Joint Development Plan

This page is intentionally left blank

DRAFT

Bury
Council

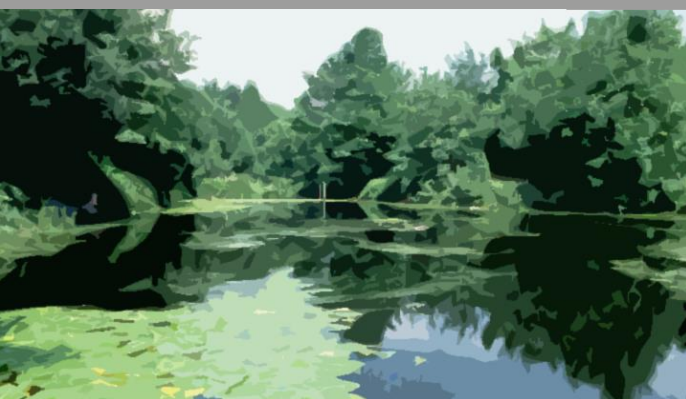


Draft Supplementary Planning Document 18

Development Frameworks for
Strategic Site Allocations at Elton
Reservoir and Walshaw



September 2024



Contents

1.	Introduction	4
2.	Policy context	6
	National policy and guidance	6
	Bury's Development Plan	7
3.	General advice	9
	The purpose of the Development Framework.....	9
	Status and approval mechanisms	11
	Collaborative working	11
	Planning Performance Agreements (PPA).....	12
	Equalisation agreements	13
	Infrastructure funding	14
	Community and stakeholder engagement.....	14
	Environmental Impact Assessment.....	15
	The scope and content of the Development Framework	16
4.	Site-specific advice: Elton Reservoir	20
	Relevant Development Plan Policies.....	20
	Places for Everyone	20
	Bury Unitary Development Plan	24
	Greater Manchester Joint Minerals Plan.....	25
	Key requirements for the Elton Reservoir site	25
	Strategic highways.....	26
	Sustainable transport and highways infrastructure	27
	Affordable housing provision.....	29
	Education provision	29
	Local centre	30
	Health provision	30
	Ecology.....	31
	Biodiversity net gain	32
	Heritage.....	33
	Country Park.....	33
	Recreation provision.....	34

	Flood risk.....	35
	Green Belt compensation	36
	Design.....	36
5.	Site-specific advice: Walshaw.....	38
	Relevant Development Plan Policies.....	38
	Places for Everyone	38
	Bury Unitary Development Plan	41
	Greater Manchester Joint Minerals Plan.....	42
	Key requirements for the Walshaw site.....	43
	Strategic through road	43
	Sustainable transport and highways infrastructure	44
	Affordable housing provision.....	45
	Education provision	45
	Local centre	46
	Health provision	46
	Ecology.....	47
	Biodiversity net gain	49
	Heritage.....	49
	Recreation provision.....	50
	Flood risk.....	51
	Green Belt compensation	52
	Design.....	52

1. Introduction

- 1.1. Supplementary planning documents (SPDs) build upon and provide more detailed advice or guidance on policies in an adopted development plan. They can be used to provide further guidance for development on specific sites, or on particular issues, such as design.
- 1.2. As they do not form part of the development plan, SPDs cannot introduce new planning policies into the development plan. However, they are a material consideration in decision-making.
- 1.3. Following its adoption on 21 March 2024, the Places for Everyone Joint Development Plan (PfE) became a key part of Bury's statutory development plan alongside the saved policies of the Unitary Development Plan (UDP) and the Greater Manchester Joint Minerals and Waste Plans. The Council is currently progressing a new Local Plan which, once adopted, will replace the saved policies of the Bury UDP.
- 1.4. PfE is a long-term plan of nine Greater Manchester districts (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford and Wigan) for jobs, new homes, and sustainable growth. One of the key purposes of PfE is to identify the amount of new development needed across the 9 districts and strategic site allocations that would help to meet these needs. This includes strategic site allocations for housing in Bury at Elton Reservoir (PfE Policy JPA7) and Walshaw (PfE Policy JPA9). There are also cross-boundary allocations at the Northern Gateway where the Council are working jointly with Rochdale Council on these sites.
- 1.5. Increasingly, existing services and infrastructure cannot accommodate additional development in an area. As a result, in order to secure sustainable growth, planned new development at a strategic scale, such as Bury's PfE strategic site allocations, bring significant benefits, not least in terms of securing infrastructure alongside growth and as an effective source of development delivery over time.
- 1.6. However, securing approvals for such sites and ensuring their effective implementation, is a time and resource-intensive process which requires commitments from all parties and a clear vision for the site.
- 1.7. Local planning authorities are increasingly involved in directing, shaping and delivering this growth. This frequently includes working alongside the private sector from the time at which a site is originally identified and through the processes of allocation and consent to the point at which development is on

the ground. The aim is to ensure that the original objectives materialise to deliver the high-quality places and appropriate type of development which meets the needs of the local area.

- 1.8. A key requirement of the PfE policies for the Elton Reservoir and Walshaw sites (policies JPA7 and JPA9) is that any proposals for these allocations must be in accordance with a comprehensive masterplan that has been approved by the Local Planning Authority (LPA) and that it shall include a clear phasing strategy as part of an integrated approach to the delivery of infrastructure to support the scale of the whole development in line with PfE Policy JP-D1 'Infrastructure Implementation'.
- 1.9. This requirement is a critical stage in providing a 'bridge' between the sites' allocation in PfE and subsequent planning consent.
- 1.10. This draft Supplementary Planning Document 18 (SPD18) sets out more detailed guidance on what the Council will expect in terms of the specific requirements of the PfE policies for the Elton Reservoir and Walshaw strategic site allocations.

2. Policy context

National policy and guidance

- 2.1 The National Planning Policy Framework (NPPF)¹ sets out the Government's planning policies for England and how these should be applied. It provides a framework within which locally prepared plans can provide for sufficient housing and other development in a sustainable manner.
- 2.2 Planning law requires that applications for planning permission be determined in accordance with the development plan unless material considerations indicate otherwise. The NPPF must be considered in preparing the development plan and is a material consideration in planning decisions.
- 2.3 The NPPF states that:
- 'Area-based character assessments, design guides and codes and masterplans can be used to help ensure that land is used efficiently while also creating beautiful and sustainable places...'*
- 2.4 The NPPF is supported by Planning Practice Guidance (PPG)² which states that:
- 'Masterplans set the vision and implementation strategy for a development. They are distinct from local design guides by focusing on site specific proposals such as the scale and layout of development, mix of uses, transport and green infrastructure. Depending on the level of detail, the masterplan may indicate the intended arrangement of buildings, streets and the public realm...' and that 'A range of other plans and technical reports may be needed alongside a masterplan, to provide supporting evidence and set out related proposals, such as a local character study, landscape assessment, transport assessment and proposals for securing biodiversity net gain. An implementation strategy could also be included, especially where development is expected to be brought forward in a number of phases'. (Paragraph: 006 Reference ID: 26-006-20191001).*

¹ <https://www.gov.uk/government/publications/national-planning-policy-framework--2>

² <https://www.gov.uk/government/collections/planning-practice-guidance>

- 2.5 In describing how masterplans can be used most effectively, PPG states that:

‘Masterplans are most likely to be produced by local authorities or developers. For local authorities, they can help to clarify design expectations early in the planning process, set a clear vision for the site, inform infrastructure and viability assessments and identify requirements for developer contributions or other investment. Developers may produce a masterplan to help evolve their own vision for a site, assess options, engage the local planning authority and community in pre-application discussions and support an outline planning application.

Whoever prepares them, masterplans can benefit from a collaborative approach between the local planning authority, site promoters and local communities so that aspirations and constraints are understood early on. Masterplans produced by local planning authorities may be adopted as supplementary planning documents to give them weight in decisions on applications. Masterplans often apply to schemes that are developed over a long time period and so may need to be subject to regular review and be flexible to adapt to changing circumstances.

Care should be taken to ensure that masterplans are viable and well understood by all involved and that graphic representations of what the development will look like do not mislead the public by showing inaccurate details or significant elements not yet decided upon’. (Paragraph: 007 Reference ID: 26-007-20191001).

Bury’s Development Plan

- 2.6 Buy’s statutory development plan currently comprises:

- The saved policies of the Unitary Development Plan³ (adopted August 1997);
- The Places for Everyone Joint Plan⁴ (adopted March 2024);
- The Greater Manchester Joint Minerals Plan⁵ (adopted April 2013); and
- The Greater Manchester Joint Waste Plan⁶ (adopted April 2012)

³ <https://www.bury.gov.uk/planning-building-control/policy-and-projects/planning-policy/adopted-bury-unitary-development-plan>

⁴ <https://www.greatermanchester-ca.gov.uk/media/9578/places-for-everyone-joint-development-plan-document.pdf>

⁵ https://www.greatermanchester-ca.gov.uk/media/1995/the_minerals_plan_april_2013_final.pdf

⁶ https://www.greatermanchester-ca.gov.uk/media/1994/greater_manchester_waste_plan_opt.pdf

- 2.7 The relevant development plan policies that are applicable to both the Elton Reservoir and Walshaw sites are set out in Chapters 4 and 5 respectively.
- 2.8 It should be noted that the intention is for the saved policies of the Unitary Development Plan to be replaced by a new Local Plan and, depending on the timescales for bringing forward the Development Frameworks and planning applications for the Elton Reservoir and Walshaw sites, policies within the Local Plan may be applicable.

3. General advice

- 3.1 The following generic advice focuses on the Council's expectations regarding the requirement in PfE Policies JPA7 (Elton Reservoir) and JPA9 (Walshaw) for any proposals for these allocations to be in accordance with a comprehensive masterplan, including an infrastructure phasing strategy. Chapters 4 and 5 set out the advice that is specific to the Elton Reservoir and Walshaw sites respectively.
- 3.2 As recognised in Planning Practice Guidance, a range of other plans and technical reports may be needed alongside a masterplan and, in accordance with this, the Council requires the masterplan and infrastructure phasing strategy to be accompanied by detailed supporting evidence and for this to be collectively presented as a Development Framework for the site.
- 3.3 In particular, the general advice sets out:
- The purpose of the Development Framework;
 - The proposed status of and approval mechanisms for the Development Framework;
 - The benefits of collaborative working between the Council and site promoters/developers/landowners, including Planning Performance Agreement and equalisation agreements;
 - Potential methods of infrastructure funding;
 - The benefits of effective community and stakeholder engagement;
 - The need for an Environmental Impact Assessment for the whole of each site; and
 - The expected scope and content of the Development Framework.
- 3.4 The advice in this draft SPD draws on guidance set out in the toolkit prepared by the Local Government Association and Planning Advisory Service - 'The Effective Delivery of Strategic Sites' (September 2021)⁷.

The purpose of the Development Framework

- 3.5 The allocation of the Elton Reservoir and Walshaw sites through Places for Everyone establishes the principle of residential development on both sites

⁷ <https://www.local.gov.uk/publications/effective-delivery-strategic-sites-accessible-version#introduction>

and the purpose of the Development Framework is to effectively bridge the gap between this allocation and the subsequent detail of the development that will emerge through planning applications on the sites.

- 3.6 The preparation of the Development Framework and its supporting evidence will ensure that key issues for the sites are identified and addressed to the satisfaction of all parties at an early stage in the planning process.
- 3.7 The Framework will establish the parameters against which future planning applications will be considered and because key issues have been factored in at an early stage, this should enable any applications to be progressed in a timelier manner.
- 3.8 On both sites, the homes that are delivered must be supported by adequate physical and social infrastructure to meet the needs of the people that will live in them and to mitigate against potential impacts arising from the development. However, the delivery of strategic sites can often be complicated by land ownerships within the site, with each owner potentially having differing views and aspirations on a variety of issues, including phasing, design, timeframes for delivery and contributions towards infrastructure.
- 3.9 As required by PfE policies for Elton Reservoir (JPA7) and Walshaw (JPA9), the Development Framework will need to include a clear and coordinated infrastructure phasing strategy that sets out **how and where this will be delivered and funded and phased to avoid disconnects between phases and construction of key services and connections.**
- 3.10 Fundamentally, the purpose of the Development Framework is to ensure that key issues for the site are identified and addressed to the satisfaction of all parties at an early stage in the planning process. By planning strategically across the site as a whole, the Development Framework will ensure that there will be a comprehensive and coordinated approach to the development of the whole site, including the delivery and location of supporting infrastructure and any necessary mitigation measures, design and placemaking principles.
- 3.11 The Framework will establish the parameters against which future planning applications will be considered and will ensure that, in the event of a planning application being submitted on part of the site, the Council is able to consider this within the context of the whole site and with an understanding of how, when and where the infrastructure required to support the development as a whole will be delivered, including new strategic highways, off-site highway interventions, active travel routes, education provision,

green infrastructure etc. **In the absence of an approved Development Framework, it is unlikely that the Council would be able to support separate planning applications on parts of the sites.**

Status and approval mechanisms

- 3.12 To give the Development Framework for Elton Reservoir and Walshaw material weight in the decision-making process, it is the Council's strong preference for them to be approved and adopted by the Council as Supplementary Planning Documents (SPD) in their own right.
- 3.13 SPDs for strategic sites are generally a useful tool to move from fixing the principle of development in the development plan and fixing key spatial development aspects.
- 3.14 In terms of approval mechanisms, in broad terms this will involve:
- Approval of the draft Development Frameworks by the Council's Cabinet for consultation;
 - Consultation on the draft Development Frameworks for a minimum period of 6 weeks;
 - Where necessary, making amendments to the Development Frameworks taking account of any representations made in response to consultation; and
 - Approval to adopt the final versions of the Development Frameworks by the Council's Cabinet.
- 3.15 Preparation, consultation and subsequent adoption of the Development Frameworks will be in accordance with the requirements of Part 5 of the Town and Country Planning (Local Development) (England) Regulations 2004.
- 3.16 Given the scale of the sites at Elton Reservoir and Walshaw, circumstances may arise that require the Development Frameworks to be updated over time.

Collaborative working

- 3.17 The Development Frameworks should ideally be co-produced, with the site promoter(s)/developer(s)/landowner(s) working in partnership with the Council. A collaborative approach towards the production of the Development Frameworks will ensure that it ultimately represents a position that all parties are satisfied with.

- 3.18 Once at draft stage, the Council would effectively take ‘ownership’ of the Development Frameworks and take them through the necessary processes up to the final adoption of the Supplementary Planning Documents (see paragraph 3.14 above).

Planning Performance Agreements (PPA)

- 3.19 Ensuring that the right resources and skills are available at the right stage of the process is an important, and often challenging, aspect of both delivering and supporting the delivery of strategic scale development.
- 3.20 To ensure that the Council can allocate appropriate resources to progress the proposals for the sites in a timely manner, it is strongly advised that the developer(s)/site promoter(s)/landowner(s) enter into a Planning Performance Agreement (PPA).
- 3.21 The PPA will be a useful tool for focussing discussions on the issues that will need to be addressed throughout the course of preparing the Development Framework and the subsequent preparation and determination of planning applications. It will help in ensuring that the Council is engaged at the earliest stage to advise on the scope of evidence required to support the Development Frameworks and the wider preparation process. It will also help to establish the timescales and resources that are likely to be required from all parties and allows for consistency in the approach and funding for both sites.
- 3.22 Where possible, it will be important to maintain continuity of Council staff dealing with each site from the outset. This is particularly important in strategic sites, where issues are often complex, can take a long time to reach a solution and can re-occur throughout the process.
- 3.23 Consistency of resource and skills are not only important within planning teams dealing with strategic sites, but also within wider disciplines which have key inputs to planning decision making, such as specialists in areas such as highways, flood risk, ecology, heritage, regeneration and housing. The PPA will also help to maintain resources as consistently as possible within these wider disciplines which will be important for project continuity and to enable issues that arise to be dealt with consistently.
- 3.24 Developers/site promoters/landowners that choose to prepare a Development Framework without involvement from the Council and its partners will run the risk that the submitted Framework would not align with the Council’s aspirations for the site and that, consequently, the Framework is not approved. This could potentially lead to delays in progressing towards

the submission of policy-compliant planning applications for the site and the subsequent delivery of development.

- 3.25 If a Development Framework has not been prepared in partnership with the Council, a PPA will still be required following the submission of the Framework to ensure that the Council is able to properly resource the review of the Framework and its supporting evidence – a process that would not be required if the Council was able to review material on an on-going basis throughout the Framework’s preparation stage.

Equalisation agreements

- 3.26 It is vital that the masterplan that will sit within the wider Development Framework is prepared on an ‘ownership-blind’ basis i.e. that location of the infrastructure that is necessary to support the development as a whole (e.g. schools, highways, open space, sustainable urban drainage systems, ecological mitigation and local centres) takes no account of land ownership. The way in which this is calculated can be very complex but unless this is agreed up front, it can delay the delivery of development.
- 3.27 Similarly, where highways and services cross the site to serve the whole development, agreements need to be in place to secure the timing of this infrastructure to avoid disadvantaging one party or delaying the delivery of one part of the site because of an inability to connect to key infrastructure and/or utilities. Indeed, it may be the case that some elements of the required infrastructure, such as strategic highways or off-site highways interventions, need to be fully delivered in advance of any housing coming forward. Again, failure to have agreements in place as to how this is to be delivered will be likely to impact on the timely delivery of housing development.
- 3.28 Significant complications can arise around this issue unless there is an agreement in place to ‘equalise’ the land and delivery costs between all parties and the Council will request a legally binding equalisation agreement which subsequently informs the Development Framework in terms of the infrastructure phasing strategy.
- 3.29 The absence of an equalisation agreement would cause difficulties in coming to an agreed position on the Development Framework for the whole site as there is likely to be considerable debate and differing views between developers, site promoters and landowners as to what land uses and infrastructure are to be located on what part of the site, or whether certain uses straddle two land ownerships.

Infrastructure funding

- 3.30 Collaboration between site promoter(s)/developer(s)/landowner(s) and the Local Planning Authority should also include exploring different options for funding the delivery of supporting infrastructure.
- 3.31 This may, for example, explore the potential for adopting a 'per dwelling' tariff-type s106 agreement where each landowner makes contributions to infrastructure costs, apportioned taking into account the mix of in kind and financial contributions to be made on each landholding.
- 3.32 Where appropriate, the Local Planning Authority may take a more proactive role as infrastructure provider on site, using preferential borrowing to build common infrastructure itself before being 'reimbursed' by the receipts from 'per dwelling' developer contributions.

Community and stakeholder engagement

- 3.33 Community and stakeholder engagement and consultation is an essential part in delivering strategic scale sites. Consideration must be given to both wider community engagement and direct political engagement with elected members.
- 3.34 Whilst clearly not all elements of the process will be able to be publicly available (commercial viability considerations or s106 negotiations for example), effective early community and stakeholder engagement will be critical in shaping the outcomes of the masterplan and infrastructure delivery strategy and to make it explicit that the central role the Local Planning Authority has in balancing competing interests.
- 3.35 Whilst there are statutory instruments which will require consultation and engagement, going above and beyond these statutory processes for strategic sites can be an effective way of generating positive outcomes, and generating greater trust in the process.
- 3.36 As such, early and effective engagement and understanding of what stakeholders and the public really want or expect from the delivery of the site during the preparation of the masterplan and infrastructure delivery strategy can go a long way to ensuring a smoother process to the delivery and formation of a new community.

Environmental Impact Assessment

- 3.37 The process of Environmental Impact Assessment (EIA) in the context of town and country planning in England is governed by the [Town and Country Planning \(Environmental Impact Assessment\) Regulations 2017 \(the '2017 Regulations'\)](#).
- 3.38 The aim of EIA is to protect the environment by ensuring that a local planning authority when deciding whether to grant planning permission for a project, which is likely to have significant effects on the environment, does so in the full knowledge of the likely significant effects, and takes this into account in the decision-making process. The regulations set out a procedure for identifying those projects which should be subject to an EIA and for assessing, consulting and coming to a decision on those projects which are likely to have significant environmental effects. The aim of Environmental Impact Assessment is also to ensure that the public are given early and effective opportunities to participate in the decision-making procedures.
- 3.39 The need for an EIA has been considered within the context of the sites as a whole, rather than considered within the context of individual planning applications and the physical scale of the developments at both the Elton Reservoir and the Walshaw sites would be above the thresholds of 150 dwellings and 5 hectares. Both developments will also involve the delivery of other infrastructure including a strategic highways and transport infrastructure, education provision, new local centres and off-site highways works and this will need to be considered comprehensively as whole projects for the purposes of the EIA Regulations.
- 3.40 Consequently, the development of the sites at Elton Reservoir and Walshaw are likely to have significant environmental effects and, as such, an EIA will be required for both sites and undertaken on the basis of the whole site.
- 3.41 The EIA should be presented in an Environmental Statement, the scope of which should be agreed with the Local Planning Authority in advance.
- 3.42 The Environmental Statement must include at least the information reasonably required to assess the likely significant environmental effects of the development listed in [regulation 18\(3\) and comply with regulation 18\(4\)](#).
- 3.43 To ensure the completeness and quality of the Environmental Statement, it should be prepared by competent experts and include a statement outlining the relevant expertise or qualifications of such experts.

The scope and content of the Development Framework

- 3.44 As required under PfE policies for the Elton Reservoir and Walshaw sites, the Development Frameworks should comprise a comprehensive masterplan and a clear infrastructure phasing strategy and both of these elements should be supported by a wide ranging and comprehensive evidence base to justify the approach taken.
- 3.45 The Development Framework should reflect a balance between fixing key elements of the development and the ability for the document to have a degree of longevity as a guide for future development by building in flexibility to allow for changing circumstances.
- 3.46 Consequently, the Development Framework should include fixed elements, such as the extent of built development and areas to be left open; the breakdown of land uses; and key transport routes, including strategic highways and active travel routes. Conversely, the Development Framework does not need to be overly prescriptive on matters such as housing mix and tenure which may need to be adjusted over time within a set of guiding parameters.
- 3.47 In terms of its specific content, the Development Frameworks for Elton Reservoir and Walshaw and their supporting evidence should, as a minimum, cover the areas set out in Table 1.

Table 1 – Scope and content of the Development Framework

Chapter	Overview of Content
1. Introduction	<ul style="list-style-type: none"> ▪ Introduction to the site, including identification of site boundary and proposals for the site. ▪ Purpose of the document.
2. Collaboration arrangements	<ul style="list-style-type: none"> ▪ Overview of collaborative arrangements between developer(s), site promoter(s), landowner(s) and the Council (e.g. Planning Performance Agreement, equalisation agreements).
3. Strategic Context	<ul style="list-style-type: none"> ▪ Setting out the key strategic messages relevant to the site (including those from national, sub-regional and local planning policy, Bury 2030 Lets Do It Strategy and other relevant plans and strategies).
4. Understanding of the Site	<ul style="list-style-type: none"> ▪ Site description (including site size, surrounding land uses, location from a local and sub-regional perspective, transport links, proximity to social and green infrastructure and services etc.) ▪ Site history. ▪ Site ownership(s). ▪ Site conditions/constraints (key existing features and constraints, including Public Rights of Way, natural habitats and wildlife or similar, green/blue infrastructure, flood risk, topography, built heritage, archaeology, geotechnical, utilities etc.). ▪ Analysis of existing infrastructure and identification of capacity constraints. ▪ Site opportunities.
5. Engagement	<ul style="list-style-type: none"> ▪ Overview of the engagement undertaken during the preparation of the Development

	Framework and how the masterplan has responded to this.
6. Vision and Objectives	<ul style="list-style-type: none"> ▪ Vision – high level statement of aspirations for the site. ▪ Strategic objectives for the site.
7. Masterplan Framework	<p>Concept-wide masterplan and presentation of key strategic principles that fully respond to the strategic context, vision and objectives for the site including:</p> <ul style="list-style-type: none"> ▪ Response to surrounding context and character. ▪ Land uses. ▪ Character areas. ▪ Legibility. ▪ Quality. ▪ Built form: uses, scale and frontages. ▪ Streets/movement - key transport routes, active travel corridors and connectivity. ▪ Parking and servicing. ▪ Affordable housing. ▪ Green Belt compensation. ▪ Green corridors/Green Infrastructure connections. ▪ Open space and recreation provision. ▪ Trees and woodland. ▪ Landscape. ▪ Biodiversity (including net gain). ▪ Drainage. ▪ Carbon, heat and energy. ▪ Health and wellbeing. ▪ Heritage. <p>This section will present a high-level framework to which future planning applications for</p>

	individual phases must accord with/precursor to detailed design codes.
8. Infrastructure delivery strategy	<ul style="list-style-type: none"> ▪ Full details of on-site and off-site infrastructure improvements required to support the development, such as highways, utilities, social, digital, drainage etc. ▪ Timescales for implementation of on-site and off-site infrastructure. ▪ Likely funding mechanisms. ▪ Developer contributions. ▪ Roles and responsibilities.
9. Scheme Benefits	Infographics relating to potential scheme benefits.
10. Main Partners	Overview of the main delivery partners and their respective roles and inputs into the Development Framework – e.g. Bury Council, GMCA, TfGM, Highways England, the Walshaw consortium etc.

4. Site-specific advice: Elton Reservoir

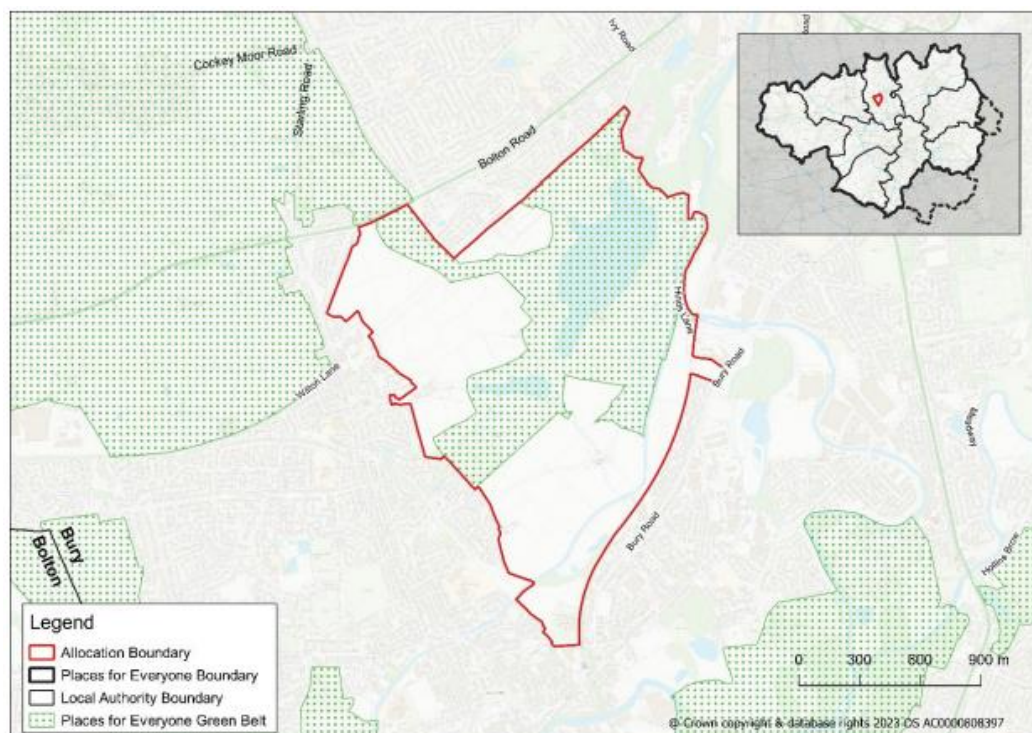
- 4.1 This chapter sets out the relevant development plan policies and the key requirements for the development of the strategic housing allocation at Elton Reservoir.

Relevant Development Plan Policies

Places for Everyone

- 4.2 The Elton Reservoir site (see Plan 1) is allocated for housing under PfE Policy JPA7 and this sets out the site-specific requirements for the site.

Plan 1 – Boundary of strategic housing allocation at Elton Reservoir as identified under PfE Policy JPA7.



4.3 The policy accompanying the Elton Reservoir allocation (Policy JPA7) states that:

Any proposals for this allocation must be in accordance with a comprehensive masterplan that has been approved by the LPA. It shall include a clear phasing strategy as part of an integrated approach to the delivery of infrastructure to support the scale of the whole development in line with Policy JP-D1 'Infrastructure Implementation'. Development within this allocation will be required to:

- 1 Deliver a broad mix of around 3,500 homes to diversify the type of accommodation in the Bury and Radcliffe areas. This includes an appropriate mix of house types and sizes, accommodation for older people, plots for custom and self-build (subject to local demand as set out in the Council's self build register) and higher densities of development in areas with good accessibility and with potential for improved public transport connectivity, particularly in the southern areas of the allocation. It is expected that around 2,100 of these homes will be delivered during the plan period;
- 2 Make provision for key enabling infrastructure including:
 - i. A north-south strategic spine road connecting Bury and Bolton Road (A58) to Bury Road, Radcliffe that is designed to be suitable for buses, would not adversely impact on the operation of Metrolink services, incorporates provision for active travel and is in line with local design standards;
 - ii. A strategic connection from the spine road to Spring Lane, Radcliffe via the former Coney Green High School site that is designed to be suitable for buses, incorporates provision for active travel and is in line with local design standards;
 - iii. Other new and improved sustainable transport and highways infrastructure having regard to the indicative transport interventions set out in Appendix D in accordance with Policy JP-C8; and
 - iv. Appropriate structural upgrades to Elton Reservoir, where required. Residential development within the allocation will be controlled to ensure that the rate of housing delivery is coordinated with the implementation of the above infrastructure (or key elements of it);
- 3 Make provision for affordable housing in accordance with local planning policy requirements, equivalent to at least 25% of the dwellings on the site and across a range of housing types and sizes

- (with an affordable housing tenure split of 60% social or affordable rented and 40% affordable home ownership);
- 4 Make provision for two new two-form entry primary schools to meet needs generated by the development, in accordance with policy JP-P5;
 - 5 Make provision for a new secondary school or, in the event that secondary school provision is delivered in an alternative way, make a financial contribution towards secondary school provision to meet needs generated by the development, in accordance with policy JP-P5;
 - 6 Make provision for two new local centres in accessible locations which include a range of appropriate retail, health and community facilities required to serve purely local needs and ensure they are integrated with existing communities;
 - 7 Ensure the design and layout allows for effective integration with surrounding communities, including active travel links and connections to Inner Radcliffe, Radcliffe town centre, Radcliffe Metrolink station, local schools and Bury town centre;
 - 8 Make provision for the replacement of existing recreation space at Warth Fold that is equivalent or better in terms of quantity and quality and in a suitable location;
 - 9 Provide a significant green corridor which remains within the Green Belt and provides a strategic amount of new, high quality and publicly accessible open space/parkland coupled with a network of multi-functional green and blue infrastructure within the allocation including the enhancement and the integration of the existing assets at Elton and Withins Reservoirs and the Manchester, Bolton and Bury Canal to create an extensive recreation, tourism and leisure asset;
 - 10 Make provision for compensatory improvements to the environmental quality and accessibility of remaining Green Belt within the site in accordance with Policy JP-G2;
 - 11 Define and/or strengthen the boundaries of the retained area of Green Belt within the site such that it will comprise physical features that are readily recognisable and likely to be permanent;
 - 12 Make provision for biodiversity, including taking appropriate account of SBIs at Elton Reservoir; Manchester, Bolton and Bury Canal (East); Elton Goit; Withins Reservoir; Black Lane Marl Pits; and Radcliffe Wetlands in accordance with Policy JP-G8;
 - 13 Ensure the allocation is safe from and mitigates for potential flood risk from all sources including the River Irwell, Elton and Withins Reservoir and surface water and does not increase the flood risk

elsewhere. The delivery of the allocation should be guided by an appropriate flood risk and drainage strategy which ensures co-ordination between phases of development;

- 14 Take appropriate account of relevant heritage assets, and their setting, including the Old Hall Farmhouse Grade II Listed Building in accordance with Policy JP-P2; and
- 15 Consider the extraction of any viable mineral resources within Mineral Safeguarding Areas, in accordance with Policy 8 of the Greater Manchester Joint Minerals Development Plan (or any relevant policies in subsequent minerals plans).

4.4 Whilst PfE Policy JPA7 sets out the site-specific requirements for the Elton Reservoir site, there are a range of other policies in PfE that are relevant to the development of this site and these are set out in Table 2:

Table 2: Other relevant PfE policies

PfE Policy
JP-S1 – Sustainable Development
JP-S2: Carbon and Energy
JP-S3: Heat and Energy Networks
JP-S5: Flood Risk and the Water Environment
JP-S6: Clean Air
JP-S7: Resource Efficiency
JP-H1: Scale, Distribution and Phasing of New Housing Development
JP-H2: Affordability of New Housing
JP-H3: Type, Size and Design of New Housing
JP-H4: Density of New Housing
JP-G1: Landscape Character
JP-G2: Green Infrastructure Network
JP-G6: Urban Green Space
JP-G7: Trees and Woodland

JP-G8: A Net Enhancement of Biodiversity and Geodiversity
JP-P1: Sustainable Places
JP-P2: Heritage
JP-P5: Education, Skills and Knowledge
JP-P6: Health
JP-P7: Sport and Recreation
JP-C1: An Integrated Network
JP-C2: Digital Connectivity
JP-C3: Public Transport
JP-C5: Streets for All
JP-C6: Walking and Cycling
JP-C8: Transport Requirements of New Development
JP-D1: Infrastructure Implementation
JP-D2: Developer Contributions

Bury Unitary Development Plan

- 4.5 The saved policies of the Bury UDP currently represent part of Bury's statutory development and will be applicable to any development on the site and the relevant policies are set out in Table 3.

Table 3 – Relevant UDP Policies

UDP Policy
H4/1 – Affordable Housing
EN6/1 - Sites of Nature Conservation Interest (Sites of Special Scientific Interest, National Nature Reserves and Grade A Sites of Biological Importance)
EN6/2 - Sites of Nature Conservation Interest (Local Nature Reserves and Grade B and C Sites of Biological Importance)

EN6/4 – Wildlife Links and Corridors (supported by SPG2)
RT1/1 – Protection of Recreation Provision in the Urban Area
RT2/2 – Recreation Provision in New Housing Development (supported by SPD1)
MW1/1 – Area of Search (Sand and Gravel)

Greater Manchester Joint Minerals Plan

- 4.6 The Greater Manchester Joint Waste Plan sets out policies to guide future minerals development and identifies Areas of Search and Mineral Safeguarding Areas in order to meet aggregate requirements and to protect minerals resources across Greater Manchester.
- 4.7 The allocation is identified as containing Mineral Safeguarding Areas for sandstone (15.5% of the site); sand and gravel (40.2%); surface coal (96.2%); and brickclay (96.2%) as defined in the Greater Manchester Joint Minerals Development Plan. The need for extraction prior to development commencing will be assessed against policies of that minerals plan (or any subsequent minerals plan) to ensure that specific mineral resources of local or national importance are not unnecessarily sterilised.

Table 4 – Relevant policy from the Greater Manchester Joint Minerals Plan

GMJMP Policy
Policy 8 – Prior Extraction of Mineral Resources within Mineral Safeguarding Areas

- 4.8 Whilst the above PfE, UDP and Joint Minerals Plan policies are considered be comprehensive, the Council reserves the right to introduce additional policy requirements for the site where necessary.

Key requirements for the Elton Reservoir site

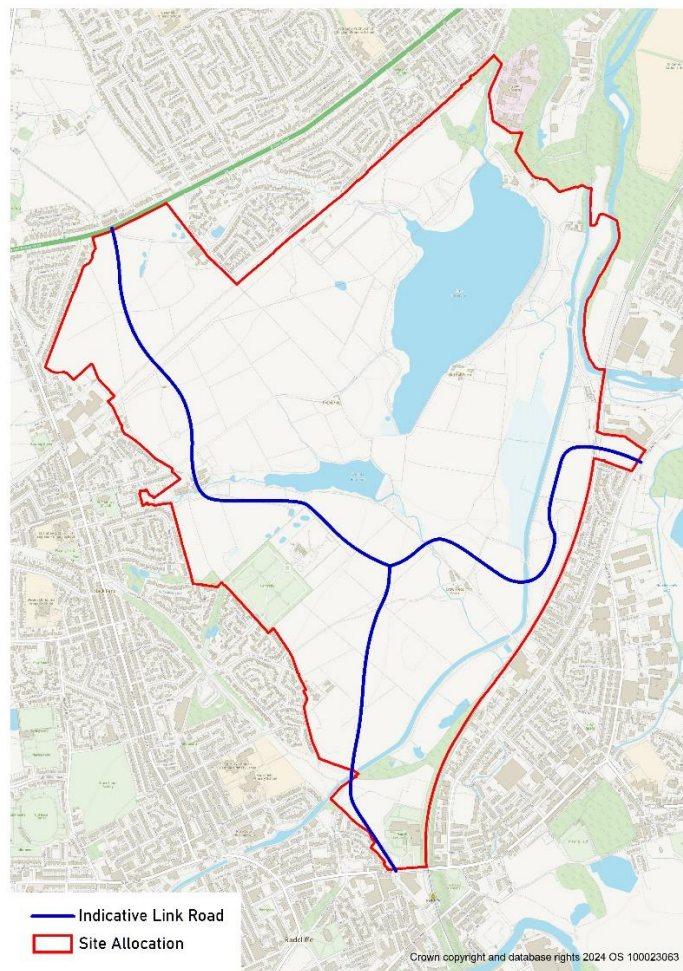
- 4.9 Any development of the site must comply with the relevant policies set out above and it is vital that the approach taken in seeking to satisfy the requirements of these policies through the development of the Elton Reservoir site is supported by proportionate but robust evidence.

- 4.10 However, there are several fundamental requirements that will need to be incorporated into the masterplan and any subsequent planning application(s) for the Elton Reservoir site and these are set out below.
- 4.11 As specified previously, there will need to be an equalisation agreement in place between the various landowners so that all landowners/developers contribute towards the delivery of the infrastructure required to support the development as a whole. The equalisation agreement will ensure that the landowner(s)/developers that control the land where such infrastructure is to be delivered are adequately compensated either financially or 'in kind' by the transfer of land from the other landowners/developers who rely upon this infrastructure for their development. It will also ensure that the cost of delivering the infrastructure is proportionately split across the development as a whole, whether that be through physical construction or through developer contributions.

Strategic highways

- 4.12 Criterion 2 of the PfE policy for Elton Reservoir (JPA7) states that development in this allocation will be required to make provision for key enabling infrastructure including a north-south strategic spine road connecting Bury and Bolton Road (A58) to Bury Road, Radcliffe and a strategic connection from the spine road to Spring Lane, Radcliffe via the former Coney Green High School site.
- 4.13 The provision of these new highways should be designed to be suitable for buses, to not adversely impact on the operation of Metrolink services, and to incorporate provision for active travel, to be in line with local design standards and to have appropriate access junctions.
- 4.14 The precise nature and specification of the new highways, junction arrangement and the specific route of these roads should be informed by detailed transport modelling and design work and should take appropriate account of ecological interests within the site.

Plan 2 – Indicative route of strategic highways through the Elton Reservoir site



Sustainable transport and highways infrastructure

- 4.15 Criterion 2iii of the PfE policy for Elton Reservoir (JPA7) states that development in this allocation will be required to make provision for other new and improved sustainable transport and highways infrastructure having regard to the indicative transport interventions set out in Appendix D in accordance with Policy JP-C8.
- 4.16 In addition to the strategic highways linking the site to Bolton Road, Bury Road and Spring Lane, the other transport interventions identified in Appendix D of Places for Everyone for the Elton Reservoir site are as follows:

Necessary:

- Elton Metrolink Stop and Park & Ride facility.
- Radcliffe Town Centre highways improvements.

- New bus services and associated stops to/through/within the allocation.
- Active travel improvements including delivery of missing section of the Bolton-Bury Cycleway.

Supporting:

- A56 / Radcliffe Road – junction improvements.
- A58 / Ainsworth Road/ Starling Road – junction improvements.

4.17 These transport interventions for the Elton Reservoir site are considered in more detail in the wider Transport Locality Assessment for Bury⁸ that was prepared to support Places for Everyone.

4.18 Again, the precise nature and specification of these interventions should be informed by detailed transport modelling and design work.

Metrolink stop and Travel Hub/Park and Ride facilities

4.19 As part of the Elton Reservoir proposals a new Metrolink Stop and Travel Hub/Park and Ride facilities will be required. The Metrolink stop is intended to encourage a large proportion of trips generated by the site to be made by sustainable modes and will support Bury in contributing to the region's Right Mix target for half of all journeys to be made by sustainable modes by 2040.

4.20 To achieve maximum accessibility of the stop, a Travel Hub and Park and Ride will be required. This will ensure that those who can access the development by active modes have safe and attractive opportunities to do so. The Park and Ride will widen the catchment area for those living further away and make it easier for people to switch longer car journeys, such as journeys to Manchester city centre, to more sustainable modes.

4.21 Key elements of the Travel Hub will include secure cycle parking, drop-off pick-up and taxi bays, shared mobility spaces, EV charging points and potentially parcel lockers. The new stop will contribute to the place making of the new development, providing a vibrant and integrated space with local facilities in line with the Travel Hub principles. The Elton Reservoir stop will also increase the attractiveness of the reservoir as a leisure destination and provide better access to greenspace in the south of Bury.

4.22 There is funding in the City Region Sustainable Transport Settlement to start to develop the proposed new stop and Travel Hub/Park and Ride. The

⁸ <https://www.greatermanchester-ca.gov.uk/what-we-do/planning-and-housing/places-for-everyone/previous-stages/places-for-everyone-2021-regulation-19/supporting-documents-2021/?folder=\09%20Connected%20Places#\fList>

Council will work with TfGM and the developer to determine an appropriate funding and delivery strategy for the new stop.

Affordable housing provision

- 4.23 Criterion 3 of the PfE policy for Elton Reservoir (JPA7) states that development in this allocation will be required to make provision for affordable housing in accordance with local planning policy requirements, equivalent to at least 25% of the dwellings proposed on the site and across a range of housing types and sizes (with an affordable housing tenure split of 60% social or affordable rented and 40% affordable home ownership).
- 4.24 The Development Framework for Elton Reservoir should demonstrate a commitment to the provision of affordable housing in line with the requirements of the PfE policy for Elton Reservoir (JPA7).

Education provision

- 4.25 Criterion 4 of the PfE policy for Elton Reservoir (JPA7) states that development in this allocation will be required to make provision for two new two-form entry primary schools to meet needs generated by the development, in accordance with policy JP-P5.
- 4.26 In addition, criterion 5 requires provision for a new secondary school or, in the event that secondary school provision is delivered in an alternative way, make a financial contribution towards secondary school provision to meet needs generated by the development, in accordance with policy JP-P5. Plans to develop a new 5-form entry Radcliffe Star Academy secondary school have progressed independently of the Elton Reservoir allocation with occupation of the school anticipated to be in Autumn 2025. Consequently, there will be a need for a developer contribution towards secondary school provision.
- 4.27 The Local Planning Authority will continue to work closely with the Council's Education services to determine the expected level of pupil yield from the development and the specific nature of primary and secondary school provision and whether such provision should be made on-site or through an off-site contribution.
- 4.28 Should it be concluded that on-site primary school provision is needed, the specific location of such provision will be determined by the Council taking account of factors such as accessibility and location in relation to key infrastructure.
- 4.29 Financial contributions towards school provision will need to be made in accordance with Supplementary Planning Document 17: Developer Contributions for Education. The level of financial contribution will be

calculated on the basis of the number of dwellings, the pupil yield from the development and the cost per pupil place.

Local centre

- 4.30 Criterion 6 of the PfE policy for Elton Reservoir (JPA7) specifies that the development should include provision for two new local centres in accessible locations which include a range of appropriate retail, health and community facilities required to serve purely local needs and ensure they are integrated with existing communities.
- 4.31 Any retail development within the local centres should be of a scale that serves the needs of the surrounding neighbourhoods to avoid it generating vehicular-based visits from the wider area.

Health provision

- 4.32 PfE Policy JP-P6 relates to how new developments should contribute to improved health outcomes and requires the provision of new or improved health facilities proportionate to the additional demand generated by the development. The level of housing growth planned at Elton Reservoir will require the provision of new primary care facilities to cope with the needs generated by the development site, in accordance with policy JP-P6.
- 4.33 The Local Planning Authority will continue to work closely with the Greater Manchester Integrated Care Board's (ICB) Primary Care and Estates teams for the Bury Locality to determine the specific nature of health provision required. In doing so, consideration will be given to alignment with the ICB's Infrastructure Strategy, investment plans, and specific priorities for the Bury Locality to ensure that healthcare services for new communities are available and delivered in a way that promotes NHS objectives related to the delivery of population-based healthcare.
- 4.34 When assessing the additional primary care floorspace requirement from new housing, the ICB uses a standard requirement of 150sqm gross internal area (GIA) per 1,750 patients. This has been derived from Health Building Note 11:01: Facilities for Primary and Community Care (HBN 11-01) to identify the scale of additional infrastructure required to provide primary care services to a modern standard of care for residents of new housing in efficient, flexible, and user-friendly environments. This floorspace standard is kept under review by the ICB to ensure it reflects the most up-to-date best practice guidance and may be revised accordingly.
- 4.35 The cost of additional primary care provision will be determined in accordance with ICB build cost benchmarks for primary care facilities. The capital costs of additional health provision, whether for upgrades to existing facilities or construction of new facilities, are based on providing spaces that

specified to be ready for occupation, as opposed to shell and core condition. This reflects the full costs of delivering health infrastructure projects. Where facilities are delivered on-site, measures to ensure that they are fit for purpose and affordable will be applied including consideration of input from the District Valuer.

- 4.36 Early and on-going engagement with the ICB and other relevant health stakeholders is particularly important during the preparation of the Development Framework. Should it be concluded that on-site health provision is needed, this will need to take the form of either in-kind provision by the developer in the form of a turnkey facility transferred to the NHS at no cost, or the provision of a serviced plot of land at no cost with a financial contribution to equivalent to the full capital cost of a new build facility of the required size.
- 4.37 The specific location of such provision will be determined by the Council in consultation with the ICB, taking account of factors such as accessibility and location in relation to key infrastructure. This could be required within either local centre, and will not be influenced by land ownership. On-site health provision should be within a single building with a planned mix of compatible uses in proximity. Provision split across multiple sites would not accord with the ICB strategy of development of integrated hubs. The design of any on-site health facility will need to meet the most up to date model of health care provision standards and be sized to incorporate the building as well as operational requirements related to parking, servicing and access for emergency vehicles.
- 4.38 As part of the master planning process, opportunities to consolidate existing health provision within the area should be explored. Colocation of front-line staff from primary, community, social and VCSE sector providers all caring for the same local people around a defined neighbourhood geography is embedded within ICB priorities to support an increase in delivering more care closer to home and a reduction in inequalities. Where there is potential for co-location of the primary care services required by the development with other complementary services, this will need to ensure that the specific clinical design requirements of primary care can be satisfied.

Ecology

- 4.39 In accordance with criterion 12 of the PfE policy for Elton Reservoir (JPA7), the development of this allocation should make provision for biodiversity, including taking appropriate account of SBIs at Elton Reservoir; Manchester, Bolton and Bury Canal (East); Elton Goit; Withins Reservoir; Black Lane Marl Pits; and Radcliffe Wetlands in accordance with Policy JP-G8.

- 4.40 In addition, although unlikely to be directly affected by the development, measures should also be taken to ensure that the Daisyfield SBI is not indirectly affected.
- 4.41 The development should also take account of protected and priority species such as great crested newts, otters, badgers, waxcaps and birds. In particular, the Development Framework should include a strategy for the:
- Conservation of breeding and wintering birds, including new habitat creation and habitat enhancement;
 - Conservation of bats, including new habitat creation and habitat enhancement;
 - Avoidance, mitigation and /or compensation for any harm caused to SBIs, including indirect harm (e.g. increased recreational pressure);
 - Site-wide conservation strategy for great crested newts;
 - Protection of Badgers;
 - Conservation of Otters in the River Irwell, Canal and Goit which may form the core of a territory;
 - Conservation of waxcap fungi communities;
 - Conservation of Brown Hare;
 - Co-ordinated invasive species management.
- 4.42 The Development Framework should take account of the emerging Greater Manchester Local Nature Recovery Strategy (LNRS) which identifies opportunities for nature recovery to strengthen wildlife links and corridors across the region.

Biodiversity net gain

- 4.43 The development will be required to achieve at least a 10% Net Gain in Biodiversity as measured using a Statutory Metric, in accord with the terms of the Environment Act 2021 and Places for Everyone Policy JP-G8 and the approach should follow the Biodiversity Net Gain Hierarchy.
- 4.44 The Development Framework should set out details of how the required Net Gain is to be achieved. If this will require off-site habitat creation and enhancement, details of off-site provision should be supplied.
- 4.45 Off-site habitat creation and enhancement, and significant on-site gains, will need to be secured for at least thirty years.

Heritage

- 4.46 Criterion 14 of the PfE policy for Elton Reservoir (JPA7) states that development at this allocation should take appropriate account of relevant heritage assets, and their setting, including the Old Hall Farmhouse Grade II Listed Building in accordance with Policy JP-P2; and
- 4.47 PfE Policy JP-P2 states that we will proactively manage and work with partners to positively conserve, sustain and enhance our historic environment and heritage assets and their settings. This includes:
- Setting out a clear vision that recognises and embeds the role of heritage in place-making;
 - ensuring that the heritage significance of a site or area is considered in accordance with national planning policy in the planning and design process and opportunities for interpretation and local engagement are optimised; and
 - Integrating the conservation and enhancement of heritage assets and their settings, with creative contextual architectural responses that contribute to their significance and sense of place.
- 4.48 The Policy states that particular consideration will be given to ensure that the significance of key elements of the historic environment which contribute to Greater Manchester's distinctive identity and sense of place are protected, including places of worship.
- 4.49 The Development Framework and the integral masterplan will need to take account of heritage assets and their settings within and around the Elton Reservoir site, including the Old Hall Farmhouse Grade II Listed Building and other heritage assets contained on the Historic Environment Record and the Bury's draft Local List.

Country Park

- 4.50 Criterion 9 of the PfE policy for Elton Reservoir (JPA7) states that the development of this allocation should provide a significant green corridor which remains within the Green Belt and provides a strategic amount of new, high quality and publicly accessible open space/parkland coupled with a network of multi-functional green and blue infrastructure within the allocation including the enhancement and the integration of the existing assets at Elton and Withins Reservoirs and the Manchester, Bolton and Bury Canal to create an extensive recreation, tourism and leisure asset.
- 4.51 The Local Planning Authority will continue to work closely with the Council's Operations department to determine the specific requirements and facilities

that should be incorporated into the Country Park. However, it should be an asset of Borough-wide significance as well as for the prospective residents of the housing within the Elton Reservoir site. As required by PfE Policy JPA7, the Country Park will need to include the enhancement and the integration of the existing assets at Elton and Withins Reservoirs and the Manchester, Bolton and Bury Canal to create an extensive recreation, tourism and leisure asset.

- 4.52 The park itself will be accessible for all, including for walking, wheeling, cycling and horse riding and involve upgraded surfaces to existing footpaths and bridleways connecting adjoining residential developments to the wider open countryside.

Recreation provision

- 4.53 The National Planning Policy Framework states that existing open space, sports and recreational buildings and land, including playing fields, should not be built on unless:
- an assessment has been undertaken which has clearly shown the open space, buildings or land to be surplus to requirements; or
 - the loss resulting from the proposed development would be replaced by equivalent or better provision in terms of quantity and quality in a suitable location; or
 - the development is for alternative sports and recreational provision, the benefits of which clearly outweigh the loss of the current or former use.
- 4.54 This is reflected in criterion 8 of the PfE policy for Elton Reservoir (JPA7) which states that the development of this allocation should make provision for the replacement of existing recreation space at Warth Fold that is equivalent or better in terms of quantity and quality and in a suitable location. Replacement provision could potentially be incorporated into the provision of the Country Park referred to above.
- 4.55 In addition, saved Policy RT2/2 of the adopted Bury Unitary Development Plan (UDP) relates to recreation provision in new housing development and states that developers of new housing on sites of 10 or more dwellings will be expected to provide for the recreational needs of the prospective residents. This Policy is supported by supplementary guidance (SPD1)⁹ which provides more detailed advice on the implementation of the Policy.
- 4.56 UDP Policy RT2/2 is supported by criterion 3 of Places for Everyone Policy JP-P7 (Sport and Recreation) which states that a network of high quality and

⁹ <https://www.bury.gov.uk/asset-library/supplementary-planning-document-open-space-sport-recreation.pdf>

accessible sports and recreation facilities will be protected and enhanced, supporting greater levels of activity for all ages, including by requiring new development to provide new and/or improved existing facilities commensurate with the demand they would generate.

- 4.57 The Local Planning Authority will continue to work closely with the Council's Operations department to determine the specific nature of recreation provision and, in particular, the types of recreation required and the extent to which this should be provided within the site or through off-site contributions. In doing so, priority will be given to those typologies where there is an identified deficiency in the area based on the standards set out in the Bury Greenspace Audit and Strategy¹⁰ (or subsequent update to it) and the Playing Pitch Strategy.
- 4.58 Should it be concluded that on-site recreation provision is required, the specific location of such provision will be determined by the Council taking account of factors such as accessibility, natural surveillance (in the case of provision for children's play) and residential amenity. Consideration will also be given as to whether open spaces can also provide dual use for Sustainable urban Drainage Systems (SuDS), delivering recreational benefits by using attenuation and storage areas for play and/or sports areas.
- 4.59 Financial contributions towards off-site recreation provision will need to be made in accordance with Supplementary Planning Document 1: Open space, sport and recreation provision in new housing development.

Flood risk

- 4.60 PfE Policy JP-S4 relates to flood risk and the water environment and states that flood risk will be managed through a variety of methods including:
- Working with natural processes and adopting a natural flood management approach to slow the speed of water drainage;
 - Locating and designing development so as to minimise the impacts of current and future flood risk; and
 - Expecting developments to manage surface water runoff through sustainable drainage systems and as close to source as possible. Development should achieve greenfield run-off rates.
- 4.61 Delivery of the allocation should be guided by an appropriate flood risk and drainage strategy in accordance with PfE Policy JP-S4 which ensures coordination between phases of development. Measures such as rainwater recycling, green roofs, water butts and permeable driveway surfaces should

¹⁰ [Bury Greenspace Audit and Strategy](#)

be considered to mitigate the impact of potential flood risk both within and beyond the site boundaries. As a green and blue infrastructure network will provide more sustainable options discharge surface water, only foul flows should connect with the public sewer.

- 4.62 In addition, structural upgrades may be required to Elton Reservoir to reflect any changes to the categorisation of the reservoir as a result of new residential development being located downstream.

Green Belt compensation

- 4.63 The National Planning Policy Framework states that plans should set out ways in which the impact of removing land from the Green Belt can be offset through compensatory improvements to the environmental quality and accessibility of remaining Green Belt land.
- 4.64 This is reflected in PfE Policy JPG2 which states that development which involves the removal of land from the Green Belt (including allocations proposed in this plan) will be required to offset the impact of removing land from the Green Belt through identifying and delivering compensatory improvements to the environmental quality and accessibility of remaining Green Belt in the vicinity of the site. Details of specific sites and projects will be established in discussion with the relevant Local Authority.
- 4.65 Criterion 10 of the PfE policy for Elton Reservoir (JPA7) states that development within this allocation will need to make provision for compensatory improvements to the environmental quality and accessibility of remaining Green Belt within the site in accordance with Policy JP-G2.
- 4.66 A significant corridor of land through the Elton Reservoir site is retained as Green Belt and this should be the focus of compensatory improvements.

Design

- 4.67 The National Planning Policy Framework states that the creation of high quality, beautiful and sustainable buildings and places is fundamental to what the planning and development process should achieve. Good design is a key aspect of sustainable development, creates better places in which to live and work and helps make development acceptable to communities.
- 4.68 It goes on to state that development that is not well designed should be refused, especially where it fails to reflect local design policies and government guidance on design.
- 4.69 Places for Everyone Policy JP-P1 relates to the creation of sustainable places and includes a range of criteria that will need to be fully considered in

the design of new development, including the preparation of the Development Framework for the Walshaw site.

- 4.70 The National Design Guide¹¹ and National Model Design Code¹² should also be considered during the preparation of the Development Framework.

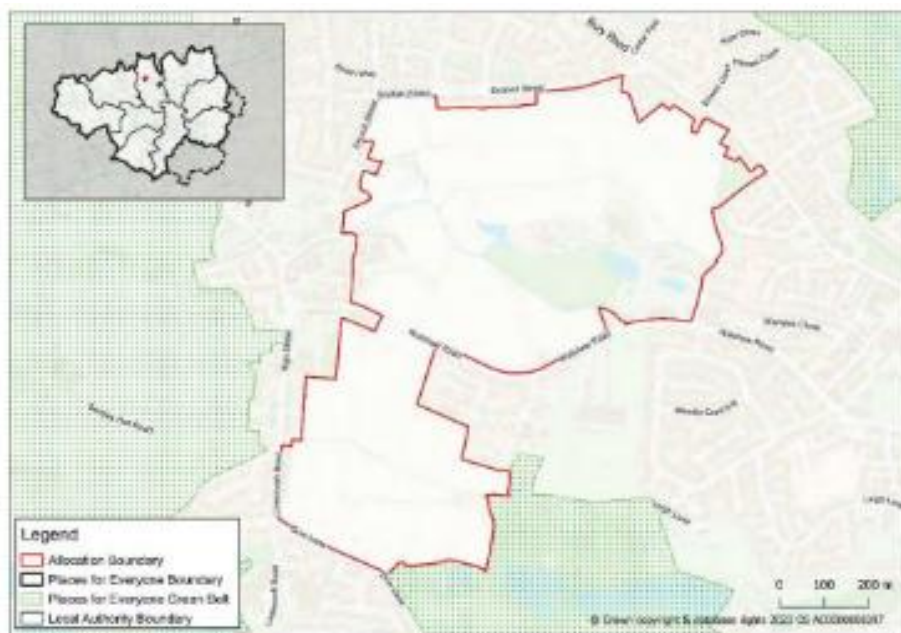
¹¹ <https://www.gov.uk/government/publications/national-design-guide>

¹² <https://www.gov.uk/government/publications/national-model-design-code>

5.1 This chapter sets out the relevant development plan policies and the key requirements for the development of the strategic housing allocation at Walshaw.

Places for Everyone

- Plan 4 – Boundary of strategic housing allocation as identified under PfE Policy JPA9.**



5.3 The policy accompanying the Walshaw allocation (Policy JPA9) states that:

Any proposals for this allocation must be in accordance with a comprehensive masterplan that has been approved by the LPA. It shall include a clear phasing strategy as part of an integrated approach to the delivery of infrastructure to support the scale of the whole development in line with Policy JP-D1 'Infrastructure Implementation'.

Development in this allocation will be required to:

- 1 Deliver a broad mix of around 1,250 homes to diversify the type of accommodation in the Walshaw area. This includes an appropriate mix of house types and sizes, accommodation for older people, and provision of plots for custom and self-build housing (subject to local demand as set out in the Council's self-build register);
- 2 Make provision of a new strategic through road to enable an alternative to Church Street, Bank Street and High Street that is designed to be suitable for buses and incorporates active travel and is in line with local design standards;
- 3 Make provision for a network of safe cycling and walking routes through the allocation linking neighbourhoods with key destinations, incorporating Leigh Lane and Dow Lane;
- 4 Make provision for other new and improved sustainable transport and highways infrastructure having regard to the indicative transport interventions set out in Appendix D in accordance with Policy JP-C8;
- 5 Make provision for affordable housing in accordance with local planning policy requirements, equivalent to at least 25% of the dwellings proposed on the site and across a range of housing types and sizes (with an affordable housing tenure split of 60% social or affordable rented and 40% affordable home ownership);
- 6 Make provision for a new one-form entry primary school and make financial contributions for off-site additional secondary school provision to meet needs generated by the development in accordance with Policy JP-P5;
- 7 Make provision for a new local centre in an accessible location which includes a range of appropriate retail, health and community facilities required to serve purely local needs and ensure that it is integrated within existing communities;
- 8 Ensure the design and layout allows for effective integration with surrounding communities, including active travel links and connections to the recreation areas at Dow Lane, Elton Vale, Whitehead Lodges as well as Walshaw Village and Bury Town Centre;

- 9 Make provision for new, high quality, publicly accessible, multifunctional green and blue infrastructure within the allocation including the integration and enhancement of the existing green infrastructure corridors and assets at Walshaw and Elton Brooks;
 - 10 Make provision for compensatory improvements to the environmental quality and accessibility of remaining Green Belt in the vicinity of the site in accordance with Policy JP-G2;
 - 11 Define and/or strengthen the boundaries of the Green Belt to the south-east of the site such that it will comprise physical features that are readily recognisable and likely to be permanent;
 - 12 Take appropriate account of relevant heritage assets, and their setting, including the Christ Church Grade II* Listed Building, in accordance with Policy JP-P2; and
 - 13 Consider the extraction of any viable mineral resources within Mineral Safeguarding Areas, in accordance with Policy 8 of the Greater Manchester Joint Minerals Development Plan (or any relevant policies in subsequent minerals plans).
- 5.4 Whilst PfE Policy JPA9 sets out the site-specific requirements for the Walshaw site, there are a range of other policies in PfE that are relevant to the development of this site and these are set out in Table 5:

Table 5: Other relevant PfE policies

PfE Policy
JP-S1 – Sustainable Development
JP-S2: Carbon and Energy
JP-S3: Heat and Energy Networks
JP-S5: Flood Risk and the Water Environment
JP-S6: Clean Air
JP-S7: Resource Efficiency
JP-H1: Scale, Distribution and Phasing of New Housing Development
JP-H2: Affordability of New Housing
JP-H3: Type, Size and Design of New Housing
JP-H4: Density of New Housing

JP-G1: Landscape Character
JP-G2: Green Infrastructure Network
JP-G6: Urban Green Space
JP-G7: Trees and Woodland
JP-G8: A Net Enhancement of Biodiversity and Geodiversity
JP-P1: Sustainable Places
JP-P2: Heritage
JP-P5: Education, Skills and Knowledge
JP-P6: Health
JP-P7: Sport and Recreation
JP-C1: An Integrated Network
JP-C2: Digital Connectivity
JP-C3: Public Transport
JP-C5: Streets for All
JP-C6: Walking and Cycling
JP-C8: Transport Requirements of New Development
JP-D1: Infrastructure Implementation
JP-D2: Developer Contributions

Bury Unitary Development Plan

- 5.5 The saved policies of the Bury UDP currently represent part of Bury's statutory development and will be applicable to any development on the site. Table 6 sets out the relevant UDP policies that should be taken into account in developing proposals for the Elton Reservoir and Walshaw sites.

Table 6 – Relevant UDP Policies

UDP Policy
H4/1 – Affordable Housing
EN6/2 - Sites of Nature Conservation Interest (Local Nature Reserves and Grade B and C Sites of Biological Importance)
EN6/4 – Wildlife Links and Corridors (supported by SPG2)
RT2/2 – Recreation Provision in New Housing Development (supported by SPD1)
MW1/1 – Minerals Area of Search (Sand)

Greater Manchester Joint Minerals Plan

- 5.6 The Greater Manchester Joint Waste Plan sets out policies to guide future minerals development and identifies Areas of Search and Mineral Safeguarding Areas in order to meet aggregate requirements and to protect minerals resources across Greater Manchester.
- 5.7 The allocation is identified as containing Mineral Safeguarding Areas for sandstone (6.3% of the site); sand and gravel (9.8%); surface coal (94.3%); and brickclay (94.3%) as defined in the Greater Manchester Joint Minerals Development Plan. The need for extraction prior to development commencing will be assessed against policies of that minerals plan (or any subsequent minerals plan) to ensure that specific mineral resources of local or national importance are not unnecessarily sterilised.

Table 7 – Relevant policy from the Greater Manchester Joint Minerals Plan

GMJMP Policy
Policy 8 – Prior Extraction of Mineral Resources within Mineral Safeguarding Areas

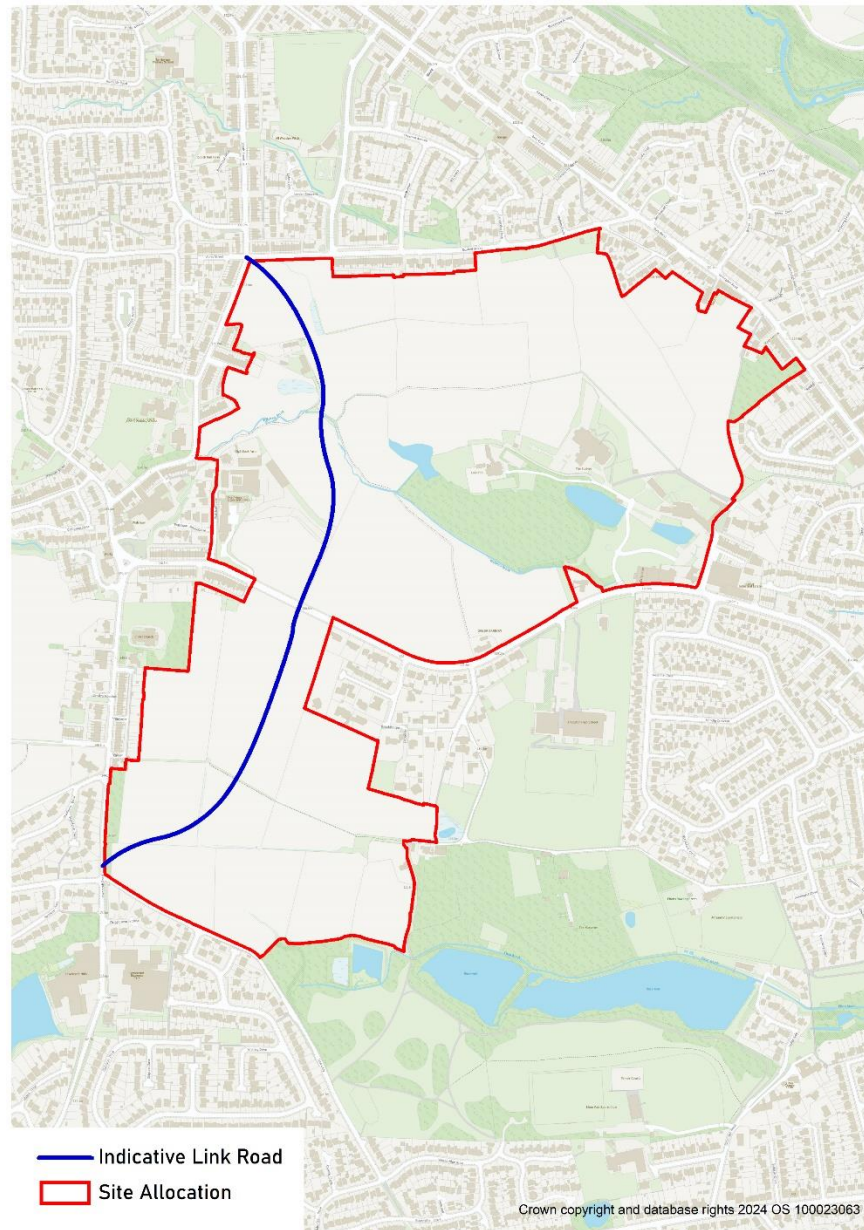
- 5.8 Whilst the above PfE, UDP and Joint Minerals Plan policies are considered be comprehensive, the Council reserves the right to introduce additional policy requirements for the site where necessary.

Key requirements for the Walshaw site

- 5.9 Any development of the site must comply with the relevant policies set out within Section 2 of this SPD and it is vital that the approach taken in seeking to satisfy the requirements of these policies through the development of the Walshaw site is supported by proportionate but robust evidence.
- 5.10 However, there are several fundamental requirements that will need to be incorporated into the masterplan and any subsequent planning application(s) for the Walshaw site and these are set out below.
- 5.11 As specified earlier, there will need to be an equalisation agreement in place between the various landowners so that all landowners/developers contribute towards the delivery of the infrastructure required to support the development as a whole. The equalisation agreement will ensure that the landowner(s)/developers that control the land where such infrastructure is to be delivered are adequately compensated either financially or 'in kind' by the transfer of land from the other landowners/developers who rely upon this infrastructure for their development. It will also ensure that the cost of delivering the infrastructure is proportionately split across the development as a whole, whether that be through physical construction or through developer contributions.

Strategic through road

- 5.12 Criterion 2 of the PfE policy for Walshaw (JPA9) states that development in this allocation will be required to make provision of a new strategic through road to enable an alternative to Church Street, Bank Street and High Street that is designed to be suitable for buses and incorporates active travel and is in line with local design standards.
- 5.13 This should involve the provision of a new strategic highway through the site with new junction arrangements at either end i.e. at Scobell Street/Church Street/Acres Street and at Walshaw Road as shown indicatively on the plan below. The precise nature and specification of the new highway, junction arrangement and the specific route of the through road should be informed by detailed transport modelling and design work.

Plan 5 – Indicative route of strategic through road for the Walshaw site**Sustainable transport and highways infrastructure**

- 5.14 Criterion 4 of the PfE policy for Walshaw (JPA9) states that development in this allocation will be required to make provision for other new and improved sustainable transport and highways infrastructure having regard to the indicative transport interventions set out in Appendix D in accordance with Policy JP-C8.
- 5.15 For the Walshaw site, the transport interventions identified in Appendix D of Places for Everyone are as follows:

Necessary:

- Link road providing bus penetration through the allocation between Lowercroft Road and Scobell Street, via Walshaw Road
- Crostons Road/ Tottington Road junction
- Tottington Road/Walshaw Road priority junction
- Cockey Moor Road junction
- A58 Bolton Road / Ainsworth Road junction improvement
- A58 Bolton & Bury Road/Starling Road junction improvement
- Introduction of bus services through the allocation
- Active travel improvements

Supporting:

- Appropriate linkages to Elton link road

5.16 These transport interventions for the Walshaw site are considered in more detail in the wider Transport Locality Assessment for Bury¹³ that was prepared to support Places for Everyone.

5.17 Again, the precise nature and specification of these interventions should be informed by detailed transport modelling and design work.

Affordable housing provision

5.18 Criterion 5 of the PfE policy for Walshaw (JPA9) states that development in this allocation will be required to make provision for affordable housing in accordance with local planning policy requirements, equivalent to at least 25% of the dwellings proposed on the site and across a range of housing types and sizes (with an affordable housing tenure split of 60% social or affordable rented and 40% affordable home ownership).

5.19 The Development Framework for Walshaw should demonstrate a commitment to the provision of affordable housing in line with the requirements of Places for Everyone Policy JPA9.

Education provision

5.20 Criterion 6 of the PfE policy for Walshaw (JPA9) states that development in this allocation will be required to make provision for a new one-form entry

¹³ <https://www.greatermanchester-ca.gov.uk/what-we-do/planning-and-housing/places-for-everyone/previous-stages/places-for-everyone-2021-regulation-19/supporting-documents-2021/?folder=\09%20Connected%20Places#\List>

primary school and make financial contributions for off-site additional secondary school provision to meet needs generated by the development in accordance with Policy JP-P5.

- 5.21 The Local Planning Authority will continue to work closely with the Council's Education services to determine the expected level of pupil yield from the development and the specific nature of primary school provision and whether such provision should be made on-site or through an off-site contribution. Opportunities to consolidate existing primary school provision in the area within the Walshaw site will also be explored.
- 5.22 Should it be concluded that on-site primary school provision is needed, the specific location of such provision will be determined by the Council taking account of factors such as accessibility and location in relation to key infrastructure. This could be required on any part of the site (north or south) and will not be influenced by land ownership.
- 5.23 Financial contributions towards school provision will need to be made in accordance with Supplementary Planning Document 17: Developer Contributions for Education. The level of financial contribution will be calculated on the basis of the number of dwellings, the pupil yield from the development and the cost per pupil place.

Local centre

- 5.24 Criterion 7 of the PfE policy for Walshaw (JPA9) specifies that the development should include provision for two new local centres in accessible locations which include a range of appropriate retail, health and community facilities required to serve purely local needs and ensure they are integrated with existing communities.
- 5.25 Any retail development within the local centre should be of a scale that serves the needs of the surrounding neighbourhoods to avoid it generating vehicular-based visits from the wider area.

Health provision

- 5.26 PfE Policy JP-P6 relates to how new developments should contribute to improved health outcomes and requires the provision of new or improved health facilities proportionate to the additional demand generated by the development. The level of housing growth planned at Walshaw will require the improvement of off-site primary care facilities to cope with the needs generated by the development site, in accordance with policy JP-P6.
- 5.27 The Local Planning Authority will continue to work closely with the Greater Manchester Integrated Care Board's (ICB) Primary Care and Estates teams for the Bury Locality to confirm that off-site provision aligns with the ICB's

Infrastructure Strategy, investment plans, and specific priorities for the Bury Locality. The ICB is committed to making more efficient use of the existing estate and in supporting Primary Care Networks and their practices to use existing larger, purpose-built health facilities where possible. Financial contributions towards off-site provision of additional primary care capacity will need to be made in accordance with the below approach.

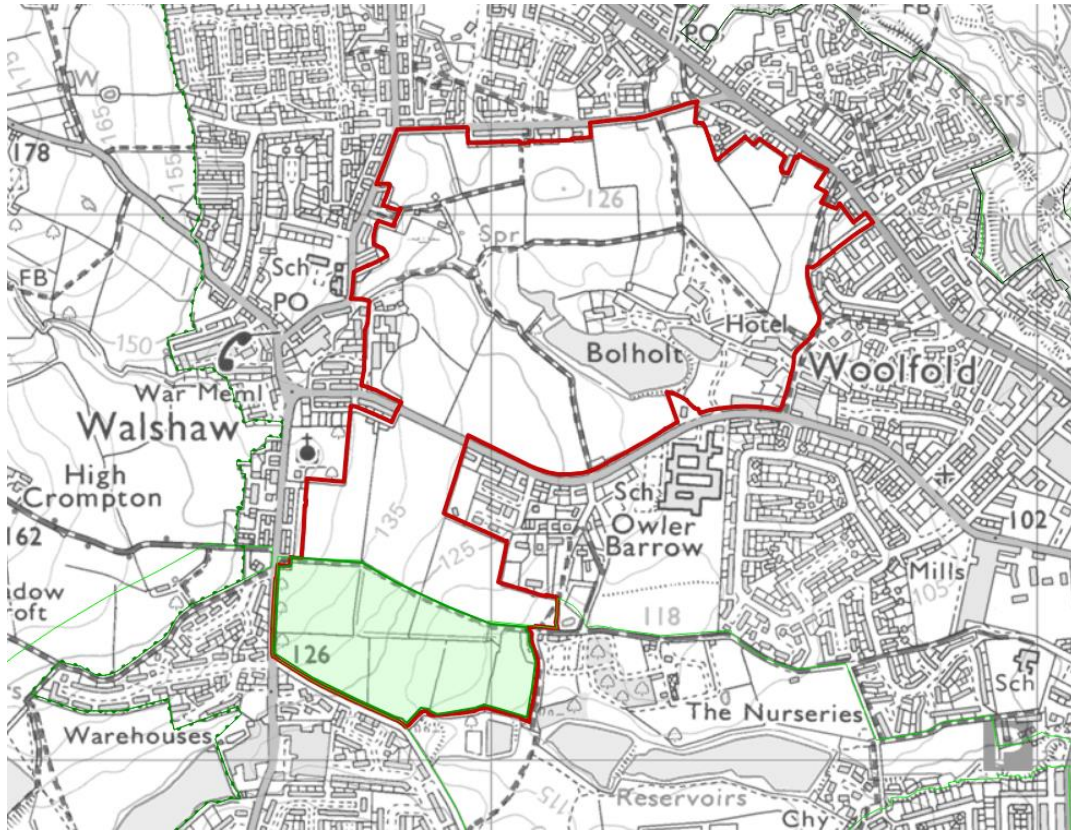
- 5.28 When assessing the additional primary care floorspace requirement from new housing, the ICB uses a standard requirement of 150sqm gross internal area (GIA) per 1,750 patients. This has been derived from Health Building Note 11:01: Facilities for Primary and Community Care (HBN 11-01) to identify the scale of additional infrastructure required to provide primary care services to a modern standard of care for residents of new housing in efficient, flexible, and user-friendly environments. This floorspace standard is kept under review by the ICB to ensure it reflects the most up-to-date best practice guidance and may be revised accordingly.
- 5.29 The cost of additional primary care provision will be determined in accordance with ICB build cost benchmarks for primary care facilities. The capital costs of additional health provision, whether for upgrades to existing facilities or construction of new facilities, are based on providing spaces that specified to be ready for occupation, as opposed to shell and core condition. This reflects the full costs of delivering health infrastructure projects. Because the existing primary care estate is well-located in relation to the Walshaw site, it anticipated that that financial contributions will be based delivering the required additional capacity via refurbishment, reconfiguration and/or extension of existing facilities.

Ecology

- 5.30 The Development Framework should incorporate a strategy that reflects the ecological priorities for the Walshaw site i.e:
- Conservation of breeding birds including new habitat creation and habitat enhancement;
 - Conservation of bats, including new habitat creation and habitat enhancement;
 - Avoidance, mitigation and /or compensation for any harm caused to SBIs, including indirect harm (e.g. increased recreational pressure);
 - Site-wide conservation strategy for amphibians;
 - Protection of Badgers;
 - Co-ordinated management of invasive species.

- 5.31 A designated wildlife corridor runs across the southern part of the allocation, as shown on the following plan, linking with adjoining corridors:

Plan 6 – Wildlife corridor at Walshaw



- 5.32 Saved Policy EN6/4 of the adopted Bury Unitary Development Plan (UDP) relates to wildlife links and corridors and states that the Council will seek to consolidate and, where appropriate, strengthen wildlife links and corridors, and will not permit development which would adversely affect identified areas. In particular, the Council will seek to ensure that new development within or adjacent to identified links or corridors contributes to their effectiveness through the design, landscaping and siting of development proposals and mitigation works, where appropriate. This Policy is supported by supplementary guidance (SPG2)¹⁴ which provides more detailed advice on the measures that can be taken as part of new development to avoid adverse impacts on wildlife links and corridors.
- 5.33 In addition, UDP Policy EN6/4 is supported by criterion 2 of Places for Everyone Policy JP-G8 (A Net Enhancement of Biodiversity and Geodiversity) which states that, through local planning and associated activities, a net enhancement of biodiversity resources will be sought, including, where relevant, by improving connections between habitats, to

¹⁴ <https://www.bury.gov.uk/asset-library/supplementary-planning-document-wildlife-corridors.pdf>

protect and enhance the provision of corridors, ecological networks (including Nature Recovery Networks) and steppingstones that enable the movement of species, especially as the climate changes. Criterion b of Policy JP-G8 also states that development will be expected to avoid fragmenting or severing connectivity between habitats.

- 5.34 Consequently, in line with UDP Policy EN6/4 (and its supplementary guidance) and Places for Everyone Policy JP-G8, development will be expected to avoid fragmenting or severing this corridor and will need to contribute to its effectiveness through the design, landscaping and siting of development proposals and mitigation works.
- 5.35 The Development Framework should take account of the emerging Greater Manchester Local Nature Recovery Strategy (LNRS) which identifies opportunities for nature recovery to strengthen wildlife links and corridors across the region.

Biodiversity net gain

- 5.36 The development will be required to achieve at least a 10% Net Gain in Biodiversity as measured using a Statutory Metric, in accord with the terms of the Environment Act 2021 and Places for Everyone Policy JP-G8 and the approach should follow the Biodiversity Net Gain Hierarchy.
- 5.37 The Development Framework should set out details of how the required Net Gain is to be achieved. If this will require off-site habitat creation and enhancement, details of off-site provision should be supplied.
- 5.38 Off-site habitat creation and enhancement, and significant on-site gains, will need to be secured for at least thirty years.

Heritage

- 5.39 Criterion 12 of the PfE policy for Walshaw (JPA9) states that development at this allocation will be required to take appropriate account of relevant heritage assets, and their setting, including the Christ Church Grade II* Listed Building, in accordance with Policy JP-P2.
- 5.40 Places for Everyone Policy JP-P2 states that we will proactively manage and work with partners to positively conserve, sustain and enhance our historic environment and heritage assets and their settings. This includes:
 - Setting out a clear vision that recognises and embeds the role of heritage in place-making;
 - ensuring that the heritage significance of a site or area is considered in accordance with national planning policy in the planning and design

process and opportunities for interpretation and local engagement are optimised; and

- Integrating the conservation and enhancement of heritage assets and their settings, with creative contextual architectural responses that contribute to their significance and sense of place.

- 5.41 The Policy states that particular consideration will be given to ensure that the significance of key elements of the historic environment which contribute to Greater Manchester's distinctive identity and sense of place are protected, including places of worship.
- 5.42 The Development Framework and the integral masterplan will need to take account of heritage assets and their settings within and around the Walshaw site, including the Grade II Listed Christ Church and other heritage assets contained on the Historic Environment Record and the Bury's draft Local List.

Recreation provision

- 5.43 Saved Policy RT2/2 of the adopted Bury Unitary Development Plan (UDP) relates to recreation provision in new housing development and states that developers of new housing on sites of 10 or more dwellings will be expected to provide for the recreational needs of the prospective residents. This Policy is supported by supplementary guidance (SPD1)¹⁵ which provides more detailed advice on the implementation of the Policy.
- 5.44 In addition, UDP Policy RT2/2 is supported by criterion 3 of Places for Everyone Policy JP-P7 (Sport and Recreation) which states that a network of high quality and accessible sports and recreation facilities will be protected and enhanced, supporting greater levels of activity for all ages, including by requiring new development to provide new and/or improved existing facilities commensurate with the demand they would generate.
- 5.45 The Local Planning Authority will continue to work closely with the Council's Operations department to determine the specific nature of recreation provision and, in particular, the types of recreation required and the extent to which this should be provided within the site or through off-site contributions. In doing so, priority will be given to those typologies where there is an identified deficiency in the area based on the standards set out in the Bury Greenspace Audit and Strategy¹⁶ (or subsequent update to it) and the Playing Pitch Strategy.

¹⁵ <https://www.bury.gov.uk/asset-library/supplementary-planning-document-open-space-sport-recreation.pdf>

¹⁶ [Bury Greenspace Audit and Strategy](#)

- 5.46 Should it be concluded that on-site recreation provision is required, the specific location of such provision will be determined by the Council taking account of factors such as accessibility, natural surveillance (in the case of provision for children's play) and residential amenity. Consideration will also be given as to whether open spaces can also provide dual use for Sustainable urban Drainage Systems (SuDS), delivering recreational benefits by using attenuation and storage areas for play and/or sports areas.
- 5.47 Financial contributions towards off-site recreation provision will need to be made in accordance with Supplementary Planning Document 1: Open space, sport and recreation provision in new housing development.

Flood risk

- 5.48 PfE Policy JP-S4 relates to flood risk and the water environment and states that flood risk will be managed through a variety of methods including:
- Working with natural processes and adopting a natural flood management approach to slow the speed of water drainage;
 - Locating and designing development so as to minimise the impacts of current and future flood risk; and
 - Expecting developments to manage surface water runoff through sustainable drainage systems and as close to source as possible. Development should achieve greenfield run-off rates.
- 5.49 There have been several incidents of surface water flooding around the site, particularly on Scobell Street, which occurs when intense rainfall overwhelms existing drainage systems. Hydraulic modelling should be undertaken to support the Development Framework and to inform the design and layout of the development, including methods of surface water management.
- 5.50 To reduce the risk of flooding, the development should minimise the risk associated with inadequate sewer capacity and minimise and control the rate of surface water run-off through an appropriate drainage strategy in accordance with PfE Policy JP-S4 and, where possible, safeguard land within the allocation for flood storage. Measures such as rainwater recycling, green roofs, water butts and permeable driveway surfaces should be considered to mitigate the impact of potential flood risk both within and beyond the site boundaries. As a green and blue infrastructure network will provide more sustainable options discharge surface water, only foul flows should connect with the public sewer.

Green Belt compensation

- 5.51 The National Planning Policy Framework states that plans should set out ways in which the impact of removing land from the Green Belt can be offset through compensatory improvements to the environmental quality and accessibility of remaining Green Belt land.
- 5.52 This is reflected in PfE Policy JPG2 which states that development which involves the removal of land from the Green Belt (including allocations proposed in this plan) will be required to offset the impact of removing land from the Green Belt through identifying and delivering compensatory improvements to the environmental quality and accessibility of remaining Green Belt in the vicinity of the site. Details of specific sites and projects will be established in discussion with the relevant Local Authority.
- 5.53 Criterion 10 of the PfE policy for Walshaw (JPA9) states that development within this allocation will need to make provision for compensatory improvements to the environmental quality and accessibility of remaining Green Belt within the site in accordance with Policy JP-G2.
- 5.54 The Development Framework should set out how it is intended to comply with the requirements for Green Belt compensation.

Design

- 5.55 The National Planning Policy Framework states that the creation of high quality, beautiful and sustainable buildings and places is fundamental to what the planning and development process should achieve. Good design is a key aspect of sustainable development, creates better places in which to live and work and helps make development acceptable to communities.
- 5.56 It goes on to state that development that is not well designed should be refused, especially where it fails to reflect local design policies and government guidance on design.
- 5.57 Places for Everyone Policy JP-P1 relates to the creation of sustainable places and includes a range of criteria that will need to be fully considered in the design of new development, including the preparation of the Development Framework for the Walshaw site.
- 5.58 The National Design Guide¹⁷ and National Model Design Code¹⁸ should also be considered during the preparation of the Development Framework.

¹⁷ <https://www.gov.uk/government/publications/national-design-guide>

¹⁸ <https://www.gov.uk/government/publications/national-model-design-code>

This page is intentionally left blank

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	Draft Supplementary Planning Document 18 – Development Frameworks for Places for Everyone Strategic Site Allocations
Lead Officer (SRO or Assistant Director/Director)	Cris Logue
Department/Team	Business, Growth and Infrastructure
Proposed Implementation Date	25 September 2024
Author of the EqlA	David Wiggins
Date of the EqlA	13 August 2024

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

Draft Supplementary Planning Document (SPD) 18 supports policies relating to Bury's strategic site allocations at Elton Reservoir (Policy JPA7) and Walshaw (Policy JPA9) of the Places for Every Joint Plan (PfE) which was adopted in March 2024.

Draft SPD18 sets out more detailed guidance on what the Council will expect in terms of this specific requirement of the PfE policies for the Elton Reservoir and Walshaw strategic site allocations. In particular, SPD18 requires the masterplans and phasing strategies are supported by detailed evidence to justify the approach and that this is presented collectively as a Development Framework for each site. It is intended that these Development Frameworks be approved as SPDs in their own right so that they will be a material consideration in the decision-making process for subsequent planning applications.

It is proposed that the draft SPD is subject to a six-week period of consultation in order to establish stakeholder views on its content.

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**

Community/Residents: **Yes**

Third parties such as suppliers, providers and voluntary organisations: **Yes** – site developers

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:

Places for Everyone Joint Development Plan and supporting evidence

Data:

[Places for Everyone Joint Development Plan and supporting evidence](#)

Stakeholder information/consultation:

Places for Everyone has been subject to consultation at various stages and has been subject to an examination by Government-appointed Inspectors.

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 mitigations Positive, Neutral, Negative
Age	Positive	PfE has been subject to an Integrated Appraisal and part of this has involved an Equality Impact Assessment which has considered in its scope, the likely effects on discriminatory practices; the potential to alter the opportunities of certain groups of people; and/or effect on relationships between different groups of people. The		

		Integrated Appraisal is available at https://www.greatermanchester-ca.gov.uk/what-we-do/planning-and-housing/places-for-everyone/pfe-adoption/		
Disability	Positive	See above		
Gender Reassignment	Neutral	See above		
Marriage and Civil Partnership	Neutral	See above		
Pregnancy and Maternity	Neutral	See above		
Race	Neutral	See above		
Religion and Belief	Neutral	See above		
Sex	Neutral	See above		
Sexual Orientation	Neutral	See above		
Carers	Neutral	See above		
Looked After Children and Care Leavers	Neutral	See above		
Socio-economically vulnerable	Positive	See above		
Veterans	Neutral	See above		

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

2.5 Characteristics	Action	Action Owner	Completion Date

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
-------------------	--------------------	-------------------------	----------------------------	---------------------------

3.2 Level of risk identified	0
-------------------------------------	---

3.3 Reasons for risk level calculation	The impacts considered under section 2.4 show that the activity will have either positive or neutral impacts on the various groups identified.
---	--

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 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	David Wiggins	13/08/24	
Responsible Asst. Director/Director	Cris Logue	13/08/24	
EDI	Lee Cawley	12/09/24	QA Complete. Positive and neutral impacts identified only

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details

This page is intentionally left blank



Classification: Open	Decision Type: Key
--------------------------------	------------------------------

Report to:	Cabinet	Date: 25 September 2024
Subject:	Holcroft Moss Planning Obligations Consultation Draft Joint Supplementary Planning Document	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1. The Holcroft Moss Planning Obligations Supplementary Planning Document (SPD) applies across the whole Places for Everyone Plan area and is, therefore, being prepared jointly by the nine PfE Plan authorities. Following adoption, the SPD will be a material consideration in determining planning applications in Bury.
2. The SPD will facilitate and provide guidance on the timely provision of required mitigation at Holcroft Moss, due to increased air pollution caused by the cumulative impact of traffic resulting from development.
3. This Report seeks Cabinet approval to consult on the Draft SPD in November 2024. Following consultation, Cabinet will be asked to approve the final version of the SPD for adoption.

Recommendation(s)

4. It is recommended that Cabinet:
 - i. Approves the draft Holcroft Moss SPD attached at Appendix 1 as the basis for a six-week public consultation commencing no earlier than 1st November 2024.
 - ii. Delegates approval to the Executive Director of Place to make minor, non-material modifications to the draft Holcroft Moss Supplementary Planning Document before consultation commences, subject to consultation and agreement with the eight other Places for Everyone authorities.

Reasons for recommendation(s)

5. To enable stakeholders to have the opportunity to provide comment on the draft Holcroft Moss Supplementary Planning Document before it is formally adopted.

Alternative options considered and rejected

6. To not approve the SPD for consultation. This would prevent stakeholders commenting on the SPD. This would result in future adoption of the document being contrary to planning regulations and would significantly limit the ability of the PfE authorities to collect S106 monies, necessary to mitigate harm to Holcroft Moss.

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

Background

7. The Places for Everyone Plan (PfE) is a joint development plan document of nine Greater Manchester authorities which was adopted on 21st March 2024.
8. PfE sets out a clear spatial strategy for delivering new homes and businesses and the infrastructure needed to support the development and to protect and enhance our towns, cities and landscapes. It covers a timeframe up to 2039.
9. PfE Policy JP-C8 seeks to ensure new development does not have an adverse impact on the protected habitats and species of Holcroft Moss, which is within the Manchester Mosses Special Area of Conservation (SAC). Where appropriate, housing and/or employment developments make a financial contribution to the provision of mitigation.

Scope and content of the draft SPD

10. The need for and amount of the financial contributions will be identified at the planning application stage. As set out in Policy JP-C8 of the PfE Plan, where planning applications are required to be accompanied by a Transport Assessment, they will need to consider air quality impacts on Holcroft Moss, within the Manchester Mosses Special Area of Conservation (SAC). Any proposals that would result in increased traffic flows on the M62 past Holcroft

Moss of more than 100 vehicles per day or 20 Heavy Goods Vehicles (HGVs) per day must devise a scheme-specific range of measures to reduce reliance on cars, reduce trip generation, promote ultra-low emission vehicles, and provide a contribution towards restoration measures at Holcroft Moss. The estimated project costs and the required contributions are set out in Appendix 2.

11. Working with Natural England and Warrington MBC, the nine PfE authorities have established the scope and estimated cost of the mitigation works. The cost of the mitigation works - including design and feasibility, land, capital costs, professional fees, monitoring, contingency and ongoing maintenance – has been estimated at approximately £880,000 (see statement of estimated project costs and required contributions, which is available alongside this SPD). Contributions will be sought on commencement of development to ensure the mitigation measures can be provided in a timely manner to offset the impacts. Individual legal agreements will specify timeframes for financial contribution(s) to be spent.
12. The exact scale of contributions for an individual site will depend upon the particular development proposed, and its impact upon Holcroft Moss. The nine PfE authorities and Warrington MBC have agreed that the cost of the mitigation works will be apportioned between the two plans. The apportionment will be based on the potential impact on Holcroft Moss identified in the respective Plans' Habitats Regulations Assessment (HRA). On this basis the PfE authorities will be responsible for 53% of the total costs and Warrington MBC will be responsible for 47% of the total costs. As Holcroft Moss lies within the area of Warrington MBC, it will administer the implementation of the mitigation scheme. Should a Transport Assessment indicate that the threshold may be exceeded, and therefore the need to consider the requirement for a Section 106 contribution, the monies would be collected by the PfE authority as required and transferred to Warrington.
13. The financial contribution(s) secured via this mechanism will enable the nine PfE Plan authorities, in conjunction with Warrington MBC, to fund mitigation works to address air quality impacts on Holcroft Moss from relevant development.
14. Each of the nine individual local planning authorities will monitor progress of individual developments to which this SPD applies. Warrington MBC will monitor the implementation of the mitigation scheme, which will be funded by money secured by planning obligations in accordance with this SPD. Regular reporting will be provided by Warrington MBC to the nine PfE authorities. The outcome of this monitoring will be included in the Authority Monitoring Report as necessary.
15. This SPD has been prepared in the context and parameters of the PfE Viability Assessments which were undertaken as part of the preparation of the PfE Plan. It is therefore assumed that the requirements set out in the SPD are viable. If viability issues are encountered on a site-by-site basis, PfE Plan Policy JP-D2 states that the Local Planning Authority will determine the weight

to be given to a viability assessment alongside other material considerations, this will include, where necessary, the need to mitigate air quality impacts on Holcroft Moss from relevant development.

Consultation and adoption

16. The Holcroft Moss SPD is being prepared in accordance with the Town and Country Planning (Local Planning) (England) Regulations 2012.
17. The public consultation will commence no sooner than 1 November 2024 and will run for six weeks.
18. Relevant material will be made available for inspection on the GMCA's website, on behalf of the nine PFE authorities, including via a link from this Council's web site. The documentation will also be made available for inspection at the Town Hall reception; Bury, Prestwich, Radcliffe or Ramsbottom Libraries and at the Tottington Centre.
19. Letters/emails will also be sent to all contacts on the Council's development plan database. Consultation will also be advertised via the Council's social media channels.
20. Following consultation, the draft Holcroft Moss SPD will, if necessary, be amended before being brought back to Members seeking formal approval for the adoption of the document.

Links with the Corporate Priorities:

21. Places for Everyone forms part of Bury's statutory development plan. It sets out statutory policies and strategic site allocations that will guide future growth and development in the Borough. A key part of the Plan is to rebalance the Greater Manchester economy by significantly boosting the economic output from the north through the delivery of new housing and employment that will benefit both Bury and its residents. The 'Let's Do It' strategy specifically refers to Places for Everyone as having a key role to play in the delivery of its objectives and priorities.

Equality Impact and Considerations:

22. The attached Equality Impact Assessment concludes that there are no negative impacts on equality and a positive impact recorded.
-

Environmental Impact and Considerations:

23. PfE Policy JP-C8 seeks to ensure new development does not have an adverse impact on the protected habitats and species of Holcroft Moss, which is within the Manchester Mosses Special Area of Conservation (SAC). Holcroft Moss is a Site of Special Scientific Interest (SSSI) designated lowland raised peat bog which is capable of absorbing and storing large amounts of carbon dioxide.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Stakeholders do not engage in the consultation on the draft Supplementary Planning Document	The SPD is being prepared in accordance with the Town and Country Planning (Local Planning) (England) Regulations 2012 which are reflected in the Council's Statement of Community Involvement. However, the consultation process will be kept under review and will be adjusted if additional stakeholder engagement is required.

Legal Implications:

24. The statutory requirements for the preparation of SPDs are set out in the Town and Country Planning (Local Planning) (England) Regulations 2012 and paragraphs 24 and 25 of this report set 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:

To be completed by the Council's Section 151 Officer.

25. The amount to be collected through s106 agreements in the PfE area is 53% of £880k which is £466,400. There should be no financial impact on the

council as Bury’s share of these costs will be covered by s106 contributions from developers.

Appendices:

Appendix 1 - Holcroft Moss Planning Obligations Consultation Draft Joint Supplementary Planning Document

Background papers:

[Places for Everyone Joint Development Plan \(adopted March 2024\).](#)

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

Term	Meaning
SPD	Supplementary Planning Document
PfE	Places for Everyone Joint Development Plan
HRA	Habitats Regulations Assessment

Holcroft Moss Planning Obligations Joint Supplementary Planning Document

Consultation Draft

November 2024

1. Introduction

Purpose of document

- 1.1. The aim of this jointly produced Supplementary Planning Document (SPD) is to provide guidance on, and to facilitate, the timely provision of required mitigation at Holcroft Moss, within the Manchester Mosses Special Area of Conservation (SAC), see Appendix 1 for the location and extent of Holcroft Moss.
- 1.2. This document is being published by the GMCA on behalf of the nine Places for Everyone (PfE) authorities (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford, and Wigan), for consultation for a period of six weeks. Full details on how to respond to the consultation on the draft SPD are set out in the Consultation Statement and Guidance Note, available on GMCA web site:
- 1.3. Following the period of public consultation, the responses received will be considered. If considered necessary, amendments will be made to the document, prior to each of the individual PfE authorities adopting the document. Once adopted, by the individual local planning authorities, the SPD will be one of a number of documents constituting important material considerations in the determination of planning applications in the authorities.
- 1.4. This draft SPD supplements PfE Policy JP-C8, in particular clause 17, which requires planning applications accompanied by a Transport Assessment to consider air quality impacts on Holcroft Moss. This requirement emerged through the preparation of PfE (in particular the Habitats Regulation Assessment) and this SPD has been prepared to ensure that contributions reflect this. The SPD has been prepared in the context of the PfE Viability Assessments¹.
- 1.5. The purpose of this SPD is to:

¹ PfE document references 03.01.01 to 03.01.05 (<https://www.greatermanchester-ca.gov.uk/what-we-do/planning-and-housing/places-for-everyone/previous-stages/places-for-everyone-2021-regulation-19/supporting-documents-2021/?folder=\\03%20Plan%20wide#fList>)

- Ensure that advice is consistent with the latest Government regulations and associated Planning Practice Guidance;
- Ensure that new development is consistent with the provisions of the recently adopted PfE Plan;
- Provide a robust basis upon which the nine PfE authorities can secure contributions from developers to ensure that the impacts of schemes on Holcroft Moss are appropriately mitigated; and
- Provide clear advice to developers as to what is expected in applications to ensure an efficient process for consultation and determination.

What is a planning obligation?

1.6. Section 106 (S106) of the Town and Country Planning Act 1990 (as amended) allows the drafting of legal agreements (Section 106 Agreements) with local planning authorities. These agreements control the impacts of development, which cannot otherwise be achieved via planning conditions. They also ensure that development proposals are compliant with local plan policies. In general, obligations fall into one of three categories:

- Prescribe the nature of the development;
- Secure a contribution from a developer to compensate for loss or damage created by a development; or
- Mitigate a development's impact (as is the case with contributions sought through this SPD).

1.7. A planning obligation runs with the land, so may be enforced against the original person who entered into the agreement and anyone acquiring an interest in the land from them.

1.8. Where planning obligations are required, planning permission will not usually be granted until the S106 legal agreement has been entered into by all relevant parties and has been completed.

When will a planning obligation be required?

Holcroft Moss Planning Obligations Joint Supplementary Planning Document -
Consultation Draft

- 1.9. As set out in Policy JP-C8 of the PfE Plan, where planning applications are required to be accompanied by a Transport Assessment, they will need to consider air quality impacts on Holcroft Moss, within the Manchester Mosses Special Area of Conservation (SAC). Any proposals that would result in increased traffic flows on the M62 past Holcroft Moss of more than 100 vehicles per day or 20 Heavy Goods Vehicles (HGVs) per day must devise a scheme-specific range of measures to reduce reliance on cars, reduce trip generation, promote ultra-low emission vehicles, and provide a contribution towards restoration measures at Holcroft Moss.
- 1.10. Development sites should not be subdivided or developed in phases to create separate development schemes which fall below thresholds, where obligations may be sought. Where this is the case, the relevant local planning authority will consider the cumulative impacts of development /delivery of allocations in their totality. This principle will apply even where applications are not submitted at the same time.
- 1.11. In some cases where outline planning permission is applied for, it may not be clear whether the threshold(s) in relation to traffic flows will be exceeded, when detailed proposals are forthcoming. In these cases, obligations will be negotiated on the presumption that the site exceeds the relevant threshold(s). However, conditions and legal agreements will be worded to allow an alternative approach if it later turns out that threshold(s) have not been exceeded.
- 1.12. The exact scale of contributions for an individual site will depend upon the particular development proposed, and its impact upon Holcroft Moss, the proposed level of contributions is set out in the statement of estimated project costs and required contributions, which is available alongside this SPD. Developers will not be required to rectify or resolve existing problems, obligations will be sought relative to the scale of impact of the proposed development.

Viability

1.13. This Planning Obligations SPD has been prepared in the context and parameters of the PfE Viability Assessments which were undertaken as part of the preparation of the PfE Plan. It is therefore assumed that the requirements set out in the SPD are viable.

1.14. If viability issues are encountered on a site-by-site basis, developers / landowners will need to provide evidence to fully demonstrate this in accordance with Policy JP-D2 of PfE and any locally specific requirements in this respect. Where it is accepted that viability should be considered as part of the determination of a planning application, Policy JP-D2 states that the Local Planning Authority will determine the weight to be given to a viability assessment alongside other material considerations, this will include the outcomes of the PfE HRA and in particular the requirement therein to mitigate/reduce air quality impacts on Holcroft Moss from relevant development.

Sustainability appraisal and strategic environmental assessment

1.15. This planning obligations SPD has been screened for the need to undertake a sustainability appraisal and strategic environmental assessment (including a Habitat Regulation Assessment) and it has been determined that assessments were not required.

1.16. The determination statements can be viewed on the GMCA website.

2. Holcroft Moss

2.1. Through the Habitats Regulation Assessment (HRA) process in support of the PfE Plan (and also Warrington's Local Plan), the Manchester Mosses Special Area of Conservation (SAC), and in particular Holcroft Moss, has been identified as being at risk of harm from increased air pollution caused by traffic. To mitigate against this harm, there is a need for the delivery of long-term ecological resilience works, involving hydrological restoration measures to benefit Holcroft Moss.

2.2. As set out in Policy JP-C8 of the PfE Plan, qualifying developments, resulting in increased traffic flows on the M62 past Holcroft Moss of more than 100 vehicles

per day or 20 Heavy Goods Vehicles (HGVs) per day, will be required to make a proportionate contribution towards restoration measures at Holcroft Moss. Contributions will be sought on commencement of development to ensure the mitigation measures can be provided in a timely manner to offset the impacts. Individual legal agreements will specify timeframes for financial contributions to be spent.

- 2.3. Working with Natural England and Warrington Metropolitan Borough Council (WMBC), the nine PfE authorities have established the scope and estimated cost of the mitigation works. The cost of the mitigation works - including design and feasibility, land, capital costs, professional fees, monitoring, contingency and ongoing maintenance – has been estimated at approximately £880,000 (see statement of estimated project costs and required contributions, which is available alongside this SPD).
- 2.4. The nine PfE authorities and WMBC have agreed that the cost of the mitigation works will be apportioned between the two plans. The apportionment will be based on the potential impact on Holcroft Moss identified in the respective Plan's HRA. On this basis the PfE authorities will be responsible for 53% of the total costs and WMBC will be responsible for 47% of the total costs.
- 2.5. Applicants, as part of the Transport Assessment, will be required to identify the number of trips passing Holcroft Moss on the M62 (residential and / or employment). Where it is determined, in accordance with Policy JP-C8, that the proposed development will impact on Holcroft Moss, this information will be used to calculate a per dwelling contribution for residential development and/or a per sq.m. contribution for employment development. In calculating the required contribution, account will be taken of land supply flexibility, with the application of a contingency of 20%.
- 2.6. The baseline calculation, as at December 2023, is detailed in the statement of estimated project costs and required contributions, which is available alongside this SPD. In consultation with WMBC, the PfE authorities will keep the mitigation scheme costs, the housing and employment land supply and the

level of contributions received under review in calculating the proportionate contribution required from a qualifying development.

- 2.7. The necessary contribution will be sought on commencement of development to ensure the works can be carried out in sufficient time to enable Holcroft Moss to build resilience to mitigate the air pollution impacts of additional traffic.
- 2.8. The PfE authorities will be responsible for securing 53% of the total cost of the scheme and will provide contributions to WMBC who will be responsible for delivering the mitigation works. Contributions will also be secured by WMBC, in accordance with its adopted Local Plan and relevant SPD.

3. Management and Monitoring

- 3.1. Each individual local planning authority is responsible for the management and monitoring of planning obligations to ensure that they are implemented and enforced in an efficient and transparent way and that contributions are spent on their intended purpose. Such monitoring will normally be reported in the relevant Council's Infrastructure Funding Statement (IFS) and/or its Authority Monitoring Report (AMR).

Management of Planning Obligations

- 3.2. Each individual local planning authority will monitor progress of individual developments to which this SPD applies. WMBC will monitor the implementation of the mitigation scheme, which will be funded by money secured by planning obligations in accordance with this SPD. Regular reporting will be provided by WMBC to the nine PfE authorities. A monitoring fee will be payable to the relevant local planning authority and secured by Section 106 Agreement. Details of how the monitoring fee is calculated is included at Appendix 2.
- 3.3. The progress of development will be monitored to ensure that financial contribution(s) are made in line with the trigger point, i.e. at the point of commencement. Once commencement has occurred, the relevant local planning authority will approach the relevant body for payment of any relevant contribution.

- 3.4. Progress of the mitigation works to Holcroft Moss will be monitored by WMBC, but reported by the individual local planning authorities, normally within the relevant AMR. Should it be deemed necessary, for example as a result of this monitoring, arrangements will be made for contributions (or part of) to be returned to the developer or person who entered into the agreement along with any agreed rate of interest as specified in the S106 Agreement.

Index Linking Payments

- 3.5. Financial contributions will be index linked in order to allow for the fluctuation of prices between the date the agreement is signed and the date the payment is made. This is calculated based on the indexation adjustment of the relevant index, from the date the S106 agreement is signed to the expected date of payment.
- 3.6. The method of indexation should be specified within the legal agreement and will usually be the Retail Price Index (RPI) published by the Office of National Statistics (ONS). In the event that the index shall decrease, the contribution shall not fall below the figure set out in the S106 agreement.
- 3.7. In consultation with WMBC, the PfE authorities will review costs that are used in the formula for establishing the contribution(s), normally on an annual basis, to ensure they are uplifted in line with indexation.

Complying with in-kind contributions

- 3.8. In the unlikely event that an in-kind obligation is agreed with a developer in respect of providing contributions towards the delivery of mitigation at Holcroft Moss, the developer is to provide evidence of compliance with the obligation to the relevant local planning authority, as outlined in the terms of the specific clauses.

Enforcement

- 3.9. The relevant local planning authority will provide a status update regarding individual agreements. Where the authority becomes aware of non-compliance with any planning obligations, consideration will be given to the possibility of immediate formal enforcement action.

3.10. The necessary contribution will be sought on commencement of development, this will be set out within the S106 agreement. The developer is bound within each S106 agreement to notify the relevant local planning authority upon commencement of the development. Where that authority is not notified and obligations become overdue the authority will seek to enforce the obligation and will activate the penalty clause.

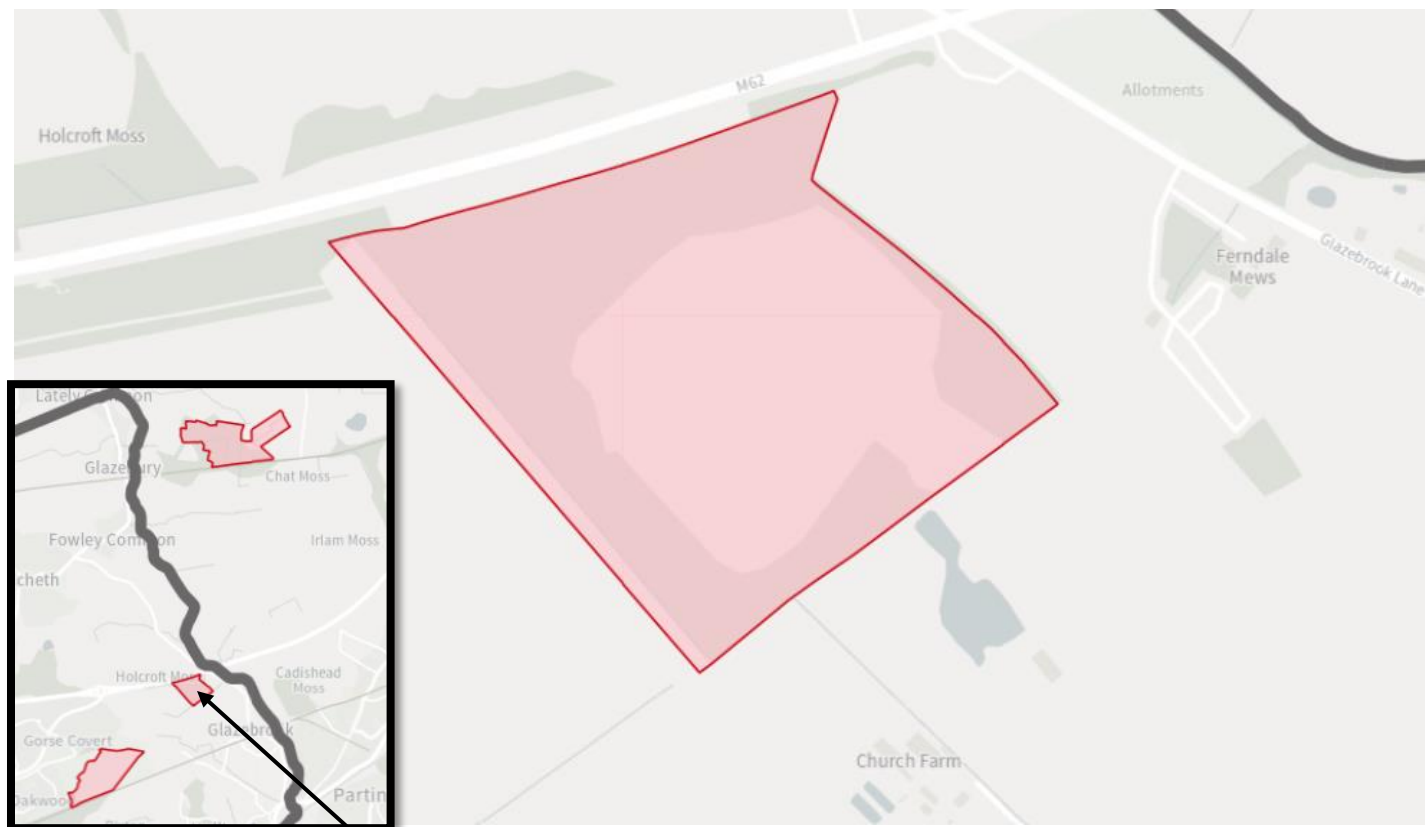
3.11. A clause included in the S106 agreement will ensure prompt payment by inserting a financial penalty requiring interest to be paid where payments are overdue. As a final recourse, where obligations are not subsequently complied with, the relevant Council will take legal action against those in breach of a S106 agreement. Non-financial obligations are also legally binding and where not provided according to the terms of the S106 agreement may be legally enforced by the Council.

Reporting

3.12. Each Council is required, in accordance with Regulation 121A of the Community Infrastructure Levy Regulations 2010 (as amended), to produce an Infrastructure Funding Statement annually that sets out details about planning obligation receipts and anticipated expenditure. The purpose of this document is to provide clarity and transparency to local communities and developers on infrastructure expenditure. The latest Infrastructure Funding Statement, for each of the individual authorities, can be viewed on their website.

Appendix 1

Map 1: Holcroft Moss within the Manchester Mosses Special Area of Conservation (SAC)



Holcroft Moss

Holcroft Moss Planning Obligations Joint Supplementary Planning Document - Consultation Draft

Appendix 2

Monitoring fees payable to the relevant local planning authority

Local Planning Authority	Details of monitoring fee applicable
Bolton	A monitoring charge is not currently charged. However: -The standard fee for s106 agreements is £520. This fee is increased for more complex S106 agreements. -A top slice cut is taken (currently 1% plus £500) -The above is currently under review so subject to change
Bury	As set out in Bury Council Section 106 proforma available at: www.bury.gov.uk/planning-building-control/policy-and-projects/planning-policy/supplementary-planning-advice
Manchester	Monitoring fee is 15% of Planning Application fee
Oldham	A monitoring fee is not currently charged, though this is under review and therefore subject to change. Further details to this, and any updates, can be provided by planning@oldham.gov.uk .
Rochdale	Details on monitoring fees and any updates to these can be provided by emailing development.management@rochdale.gov.uk
Salford	For the period 1 April 2024 to 31 March 2025 the monitoring fee is 1.5% of the total value of all planning obligations (financial and non-financial) capped at a maximum of £6,624. Further details relating to this, and any updates to it, can be provided by emailing section106@salford.gov.uk
Tameside	A monitoring fee is not currently charged, though this could be reviewed in the future and is therefore potentially subject to change. Further details to this,

	and any updates, can be provided by emailing planningmail@tameside.gov.uk
Trafford	The standard fee is 5% of the s106 contribution.
Wigan	A monitoring fee is not currently charged, though this is under review and therefore subject to change. Further details to this, and any updates, can be provided by emailing planning@wigan.gov.uk .

Holcroft Moss Planning Obligations Supplementary Planning Document

Estimated Project Costs and Required Contributions

Consultation Draft

November 2024

Estimated Project Costs and Required Contributions

Restoration Costs	
Professional services hydrology, engineering drawings and design	
Water level control pipes/ overflow pipes	
Ditch crossing	
Piled ditch blocks	
Tree clearance (felling)/access	
Ditch infilling	
Earth/peat bunding	
New ditch	
Wetland scrape creation to win peat for bunding	
New fencing	
Gate	
20% Contingency	
Land costs	
Total	717,216
Natural England Monitoring and Advice	
Project initiation and advice Meetings:	
Future meetings	
Preparation of Management Plan Draft to date	
Estimation of time to complete management plan	
Advice from Senior Adviser during implementation phase of restoration works	
NE monitoring annual	
NE monitoring on 5-year cycle	
Total	11,825
Maintenance Costs	
Clearance of trees and scrub	
Clearance of silt from ditches	
Contingency for repair of overflow pipes, gates, fences, and dams	

Total	21,500
Professional Fees	
Local authority costs	
Other professional fees	
Total	129,013
Total (Costs as at December 2023)	879,554

Places for Everyone Plan Proportion of HRA Impact – 53% (£466,164)

Warrington Proportion of HRA Impact – 47% (£413,390)

Estimated total qualifying development

Residential 15,477 homes

Employment 2,421,776 sqm

Estimated Places for Everyone Plan qualifying development

Estimated homes on qualifying sites 11,212 (accounts for 75% of the PfE impact (£349,623))

Estimated employment floorspace on qualifying sites 2,027,876 sqm (accounts for 25% of the PfE impact (£116,541))

Required contributions for qualifying developments in Places for Everyone Plan area (including 20% contingency)

Per residential unit: £ 37

Per 100 sqm employment floorspace: £ 7

This page is intentionally left blank

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	Holcroft Moss Planning Obligations Consultation Draft Joint Supplementary Planning Document
Lead Officer (SRO or Assistant Director/Director)	Cris Logue
Department/Team	Business, Growth and Infrastructure
Proposed Implementation Date	25 September 2024
Author of the EqIA	David Wiggins
Date of the EqIA	13 August 2024

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?
<p>The aim of this jointly produced Supplementary Planning Document (SPD) is to provide guidance on, and to facilitate, the timely provision of required mitigation at Holcroft Moss, within the Manchester Mosses Special Area of Conservation.</p> <p>It is proposed that the draft SPD is subject to a six-week period of consultation in order to establish stakeholder views on its content.</p>

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: No</p> <p>Community/Residents: Yes</p>

Third parties such as suppliers, providers and voluntary organisations: Yes – site developers 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: Places for Everyone Joint Development Plan and supporting evidence				
Data: Places for Everyone Joint Development Plan and supporting evidence				
Stakeholder information/consultation: Places for Everyone has been subject to consultation at various stages and has been subject to an examination by Government-appointed Inspectors.				
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.				
<ul style="list-style-type: none"> 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 mitigations

				Positive, Neutral, Negative
Age	Positive	PfE has been subject to an Integrated Appraisal and part of this has involved an Equality Impact Assessment which has considered in its scope, the likely effects on discriminatory practices; the potential to alter the opportunities of certain groups of people; and/or effect on relationships between different groups of people. The Integrated Appraisal is available at https://www.greatermanchester-ca.gov.uk/what-we-do/planning-and-housing/places-for-everyone/pfe-adoption/		
Disability	Positive	See above		
Gender Reassignment	Neutral	See above		
Marriage and Civil Partnership	Neutral	See above		
Pregnancy and Maternity	Neutral	See above		
Race	Neutral	See above		
Religion and Belief	Neutral	See above		
Sex	Neutral	See above		
Sexual Orientation	Neutral	See above		

Carers	Neutral	See above		
Looked After Children and Care Leavers	Neutral	See above		
Socio-economically vulnerable	Positive	See above		
Veterans	Neutral	See above		

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

2.5 Characteristics	Action	Action Owner	Completion Date

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
-------------------	--------------------	-------------------------	----------------------------	---------------------------

3.2 Level of risk identified	0
3.3 Reasons for risk level calculation	The impacts considered under section 2.4 show that the activity will have either positive or neutral impacts on the various groups identified.

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 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	David Wiggins	13/08/24	
Responsible Asst. Director/Director	Cris Logue	13/08/24	
EDI	Lee Cawley	12/09/24	QA Complete. Positive & neutral impacts identified only

EqlA Revision Log

5.2 Revision Date	Revision By	Revision Details



Classification: Open	Decision Type: Key
--------------------------------	------------------------------

Report to:	Cabinet	Date: 25 September 2024
Subject:	Bury Biodiversity Strategy	
Report of	Cabinet Member for Environment, Climate Change and Operations	

Summary

1. At its meeting on 13 December 2023, Cabinet agreed to consult the public on a draft Biodiversity Strategy for the Borough. This report summarises the results of the consultation and proposes the adoption of a revised Strategy.

Recommendation(s)

2. That Members:
 - i. Note the responses to the public consultation and the proposed post-consultation revisions as set out in Appendix B.
 - ii. Adopt the revised Bury Biodiversity Strategy (Appendix A), noting that it will be reviewed within the next five years.
 - iii. Delegate authority to the Executive Director (Place), to make any minor non-material editorial amendments to the Biodiversity Strategy ahead of its final publication.

Reasons for recommendation(s)

3. To ensure that the Council has an up-to-date strategy in place for the conservation and enhancement of Bury's biodiversity assets.

Alternative options considered and rejected

4. Not to adopt Bury Biodiversity Strategy. This option has been considered and rejected as the Council would not then have an up-to-date strategy and objectives for biodiversity.
-

Report Author and Contact Details:

Name: Chris Wilkinson

Position: Unit Manager: Planning, Projects and Environment

Department: Business, Growth and Infrastructure

E-mail: c.m.wilkinson@bury.gov.uk

Background

5. The Natural Environment and Rural Communities Act 2006, as amended by the Environment Act 2021, gives public bodies the duty to conserve and enhance biodiversity. This means that, as a public authority, Bury Council must:
 - Consider what we can do to conserve and enhance biodiversity;
 - Agree objectives and policies based on consideration of the duty; and
 - Act to deliver our policies and achieve our objectives.
6. In doing so, we must consider how other strategies, such as the Greater Manchester Local Nature Recovery Strategy (LNRS) which is currently being prepared, will affect how the authority complies with the biodiversity duty.
7. The action we take for biodiversity will contribute to the achievement of national goals and targets on biodiversity that are set out in the government's Environmental Improvement Plan (January 2023) which include:
 - By 2024, increase species abundance by at least 10% from 2030, surpassing 2022 levels;
 - Restore or create at least 500,000 hectares of a range of wildlife rich habitats by 2042, with 140,000 hectares of this being restored or created by 2028 alongside the commitment to protect 30% of land and ocean by 2030;
 - Reduce the risk of species extinction by 2042;
 - New interim targets for all sites of special scientific interest (SSSIs) to have an up-to date condition assessment; and for 50% of SSSIs to be on track to achieve favourable condition by 2028.

- Increase tree canopy and woodland cover from 14.5% to 16.5% of total land area in England by 2050, with a new interim target to increase this by 0.26% (equivalent to 34,000 hectares) by 31 January 2028.

The legal requirements

8. The legal requirements are set out in the Natural Environment and Rural Communities Act 2006, as amended by the Environment Act 2021.
9. These require a public authority which has any functions exercisable in relation to England to consider what action the authority can properly take, consistently with the proper exercise of its functions, to further the general biodiversity objective.
10. After that consideration the authority must (unless it concludes there is no new action it can properly take):
 - determine such policies and specific objectives as it considers appropriate for taking action to further the general biodiversity objective; and
 - take such action as it considers appropriate, in the light of those policies and objectives, to further that objective.
11. In complying with the duty, authorities must have regard to:
 - any relevant Local Nature Recovery Strategy; and
 - any relevant species conservation strategies or protected sites strategies prepared by Natural England.

A Biodiversity Strategy for Bury

12. The Biodiversity Strategy (see Appendix A) embraces the first consideration of what the Council can do to meet its biodiversity duty. It outlines the current state of biodiversity in the Borough and the actions that we can take including:
 - Managing land to improve biodiversity including enhancing protected sites, making spaces for wildlife and improving how we manage buildings;
 - Educating, advising and raising awareness;
 - Reviewing internal policies and procedures;
 - Preparing for biodiversity net gain; and
 - Reporting on biodiversity policies and actions.

13. The Biodiversity Strategy proposes 3 objectives:
- to improve our understanding and awareness of biodiversity in Bury;
 - to consider biodiversity in all Council decision making; and
 - to bring about the recovery of nature in the Borough in line with national and city-region objectives and targets.

Consultation on the draft Biodiversity Strategy

14. The first draft of the Strategy was approved for consultation by Cabinet in December 2023 and consultation subsequently took place between 9 January and 20 February 2024.
15. The draft Biodiversity Strategy was made available for inspection on the Council's website and the consultation was promoted via various social media channels. Feedback was encouraged via an online questionnaire.
16. The questionnaire followed the following structure:
- Respondents' connection to the Borough.
 - Chapter 2: The current state of Biodiversity in Bury.
 - Chapter 3: What can we do to conserve and enhance Biodiversity in Bury?
 - Chapter 4: Objectives, Policies and Actions.
 - Other comments
17. The questionnaire allowed respondents to state to what level they agreed or disagreed with the information provided in the Strategy, and provided space for any additional comments and reasons for their answers that the Council should consider when finalising the Strategy. A consultation summary report has been prepared (see Appendix B) which considers each of the comments made in turn and notes where any changes to the strategy have been made.

Summary of the consultation responses

- 52.4% of respondents agree or strongly agree that the strategy reflects the current state of biodiversity in the Borough.
- 52.4% of respondents agree or strongly agree with the proposals for land management in Bury.

- 66.6% agreed or strongly agree with the proposals for providing advice and increasing awareness.
 - More than 76% of respondents agree or strongly agree with the Biodiversity Strategy's objectives.
18. Several - comments were made in relation to amending the text to refer to the role that buildings can play as habitats for some species, potential specific measures that could be implemented in order to deliver the strategy and engage with the public. As a result, the schedule of changes in Appendix B includes (but is not limited to) amendments such as:
- Chapter 2 amended to incorporate the role that buildings play in the borough for nesting.
 - Chapter 2 amended to add reference to wetlands in the borough and update the Landscape Character Types.
 - Chapter 2 amended to make reference to priority habitats and other mapping by Natural England.
 - Chapter 3 amended to communicate the Councils recent resolution to require best practice standards for inclusion of swift boxes in the updated Bury Local Plan and ensure that any plans to re-roof the Councils housing stock is seen as an opportunity to install swift bricks.
 - Chapter 3 amended to incorporate reference to creation of hedgehog highways as an action that the general public could take.
 - The end of the document has been amended to add links to helpful information and environmental mapping so that the public can explore how they could help.
19. A number of responses asked for specific measures such as creating hedgehog highways, encouraging the community to have pride in their towns by planting plants which attract pollinators, actively promote real lawns, tax/ban artificial lawns, adopt a list of local priority species, offer free nest boxes to the public, and tackling littering. It is intended for specific measures like these to be developed through the implementation of the strategy, which will require a dedicated resource to track and manage the projects and actions.
20. Overall, respondents said they were glad to see the Council taking action and recognising the need for a Strategy as a step forward however, that the commitment to delivering the strategy will be the key to real change.

The revised Biodiversity Strategy

21. In response to the consultation comments, the Biodiversity Strategy has been updated (see Appendix A). A consultation summary report (Appendix B) has been prepared which summarises the responses received and highlights where changes have been made to the Strategy in response.

Next steps

22. The Council will use the Biodiversity Strategy to inform future decision making and practices.
23. The Council is required to publish its first Biodiversity Monitoring Report by 1 January 2026 to evidence how we are conserving and enhance biodiversity in the Borough.

Links with the Corporate Priorities:

24. As part of 'Section 4 – Vision for the Borough in 2030' of the Let's Do It Strategy there is a commitment to Carbon Neutrality by 2038 and the support of green and blue infrastructure as part of Local Neighbourhoods, which is closely related to conserving and enhancing biodiversity.

Equality Impact and Considerations:

25. An Equality Impact Assessment has been carried out and it has been concluded that there will be a neutral effect on all groups of people with protected equality characteristics.

Environmental Impact and Considerations:

26. The items outlined in this report demonstrate how the Council is going to meet its biodiversity duty, looking at what the Borough can do to conserve and enhance biodiversity. Given the role of vegetation in 'locking in' carbon, it is envisaged that the Strategy will have a significantly positive impact on carbon emissions and biodiversity.
-

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
That Bury would not have up-to-date objectives, policies and proposals for biodiversity.	By adopting a Bury Biodiversity Strategy we can demonstrate how we are meeting our biodiversity duty.
That the actions set out in the Strategy are not delivered.	The Strategy and its success will be monitored and reviewed if necessary.

Legal Implications:

27. The proposed strategy will ensure the Council complies with the duty set out in Section 102 of the Environment Act 2021. The legal implications are set out within the body of this report at paragraphs 8 - 11

Financial Implications:

28. The cost of the Biodiversity Strategy and consultation was met through the DEFRA Biodiversity Net Gain new burdens grant for 2023-24.
29. The final Strategy brings together relevant actions from existing programmes. Any new actions requiring additional resources will be the subject of future reports and decisions.

Appendices:

Appendix A - Draft Biodiversity Strategy

Appendix B – Consultation Summary Report including Schedule of Changes

Background papers:

Please list any background documents to this report and include a hyperlink where possible.

The DEFRA requirement for ‘first considerations’ in implementing the biodiversity duty:

- [Complying with the biodiversity duty](#)
- [Reporting your biodiversity duty actions](#)

DEFRA Guidance on Biodiversity Net Gain:

- [Understanding Biodiversity Net Gain](#)
- [Biodiversity net gain guidance – what you need to know - Land use: policies and framework \(blog.gov.uk\)](#)

GMCA Guidance on Biodiversity Net Gain:

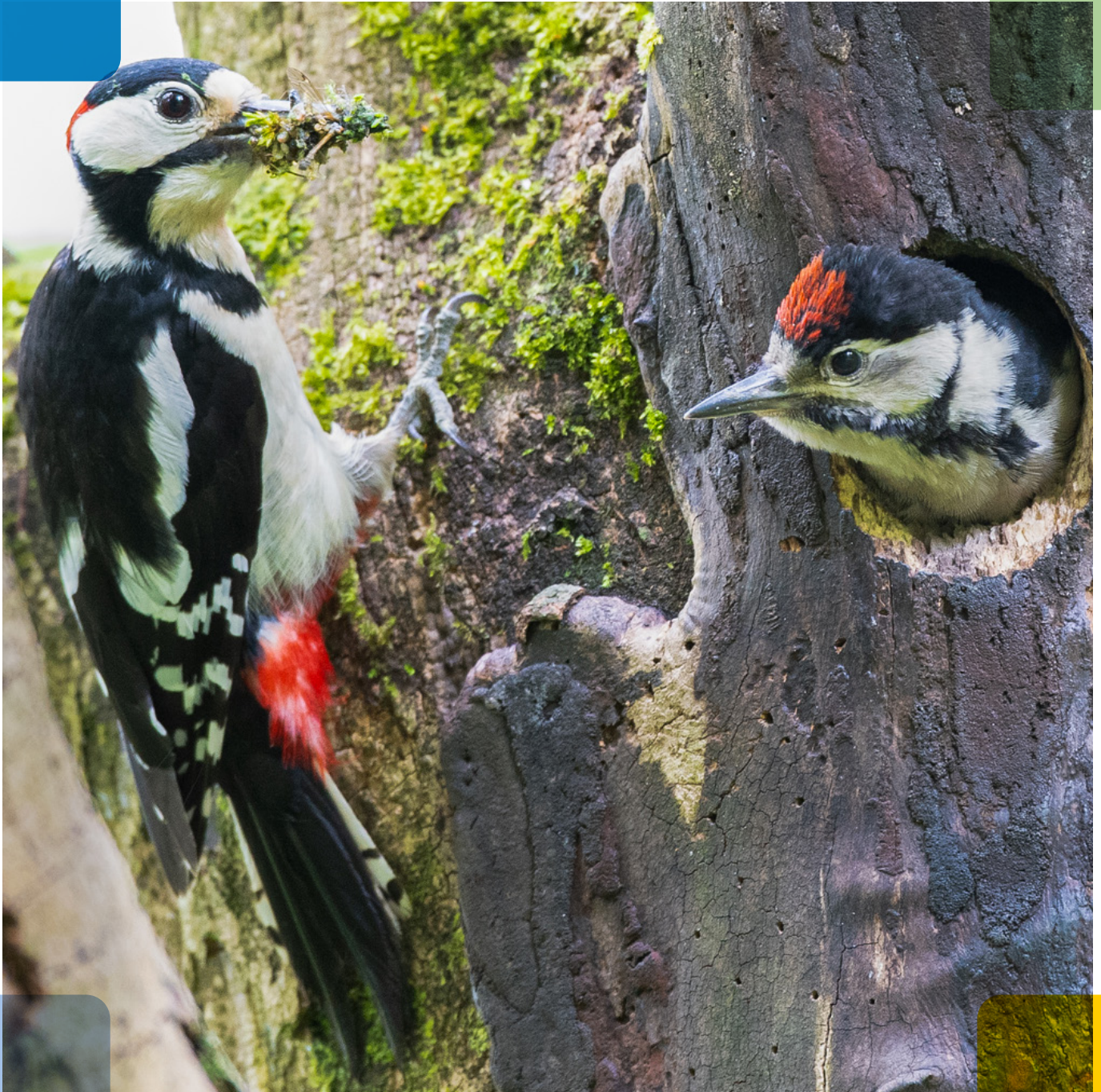
- [The GMCA webpages on Biodiversity Net Gain](#)
- [Guidance for Greater Manchester](#)

Cabinet Report:

- [Previous Cabinet report on draft Biodiversity Strategy \(13 December 2023\)](#)

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

Term	Meaning
Biodiversity	The variety of plant and animal life in the world or in a particular habitat.
Biodiversity Duty	The general duty to conserve and enhance biodiversity that a public authority has and must consider when exercising its functions
Biodiversity Net Gain	Biodiversity net gain (BNG) is an approach to development and/or land management that aims to leave the natural environment in a measurably better state than it was beforehand.
LNRS	Local Nature Recovery Strategy



Bury Biodiversity Strategy 2024

Foreword

We know the natural environment is important for our physical and mental health, for reducing flood risk, for improving air quality and many other reasons. It affects our quality of life and that of the wildlife we share it with.

Our natural environment faces many challenges, but also some opportunities. We've been through an industrial revolution yet the canals and reservoirs which served it are now some of our most important wildlife sites. We have increasing problems with invasive species such as giant hogweed, but the possibility of the return of species such as otter and beaver. Diseases such as ash die-back are a real threat but, working with local organisations such as the Wildlife Trust and City of Trees, we are planting more new trees than ever.

This is the Council's first ever Biodiversity Strategy. We want it to make a difference. Much work has been done through the Council's Community Climate Action Fund and the GM Green Spaces Fund but much remains to be done. All land and property owners or managers can help and your actions, offers and suggestions are welcome.

Cllr Alan Quinn

**Cabinet Member Environment, Climate Change
and Operations**



Contents

1. Introduction	1
Why biodiversity matters	1
National context	2
Greater Manchester context	2
Our Biodiversity Duty	3
2. The current state of Biodiversity in Bury	4
Sites of Special Scientific Interest (SSSIs)	6
Site of Biological Importance (SBIs)	6
Local Nature Reserves	7
Wildlife links and corridors	7
3. What can we do to conserve and enhance biodiversity in Bury?	9
Managing land for biodiversity	9
Advice and awareness	10
Council policies and procedures	10
New development	11
Preparing for biodiversity net gain	11
4. Objectives, Policies and Actions	13
5. Reporting and Monitoring	16
6. Appendices	17
Legislation, guidance and policy	17

1. Introduction



The benefits of biodiversity are clear; a healthy natural environment is fundamental to the air that we breathe, the food that we eat and the water that we drink

Why biodiversity matters

- 1.1 Bury's natural or semi-natural environment is one of its key assets and a reason that people choose to live and invest here. From the wild moorland of the West Pennine Moors in the north to the extensive parks and public open spaces of the Irwell Valley in the south, the borough's natural environment helps define the character of its settlements, provides habitats for other species and provides relief for residents from air, noise and light pollution.
- 1.2 The Borough's natural environment is also where most of its biodiversity can be found. Biodiversity is the variety of life on earth. There is a complex interdependency between all the life-forms, of which the human race is just one.
- 1.3 The UK boasts more than 70,000 known species of animals, plants, fungi and microorganisms, but most assessments indicate that the abundance of its wildlife is declining¹. The State of Nature² report, published in September 2023 suggests there has been a 19% decline in the average abundance of species in the UK since the 1970s and 16% of species are now threatened with extinction. Growing pressure from urban development, agricultural intensification, introduced diseases, invasive non-native species, pollution and climate change threatens to further exacerbate the decline of the UK's nature over the coming decades.
- 1.4 The benefits of biodiversity and nature are clear; a healthy natural environment is fundamental to the air that we breathe, the food that we eat and the water that we drink. It is increasingly accepted that connection to nature positively affects our physical health and mental wellbeing. Biodiverse and natural areas also have a strong connection to the sense of place in neighbourhoods across Bury. Trees and other green infrastructure more widely can have a positive impact on air quality by removing pollutants from the air. The way in which green spaces are managed can also reduce the impact of flooding; for example, reducing the extent of impermeable surfaces in residents' gardens will both reduce flood risk and support the recovery of nature.

¹ <https://geospatialcommission.blog.gov.uk/2021/05/25/70000-species-in-the-uk-who-records-them-and-where-are-they-all-the-importance-of-knowing-what-species-are-where/>
² https://stateofnature.org.uk/wp-content/uploads/2023/09/TP25999-State-of-Nature-main-report_2023_FULL-DOC-v12.pdf

National context

- 1.5 Scientific evidence clearly shows an alarming acceleration of biodiversity loss globally and has led to calls to address this before the damage becomes irreversible. Species diversity and abundance in the UK continues to decline and the UK failed to meet most of the Convention on Biological Diversity's 2020 Aichi targets for biodiversity.
- 1.6 In 2018, the government produced a 25 Year Environment Plan³. In 2023 it produced an update, committing the government to:
 - halt the decline in species abundance (through the launch of a Species Survival Fund and the creation, restoration and extension of 70 areas for wildlife through National Nature Reserves and Landscape recovery projects).
 - protect 30% of UK land and sea for nature (through the Nature Recovery Network).
- 1.7 By 2042 the government has committed to:
 - halt the decline in species abundance by 2030, and then increase abundance by at least 10% to exceed 2022 levels by 2042.
 - restore or create at least 500,000 ha of a range of wildlife rich habitats.
 - reduce the risk of species extinction.
 - restore 75% of terrestrial and freshwater protected sites to 'favourable condition'.

Greater Manchester context

- 1.8 The Greater Manchester Five-Year Environment Plan (2019-2024)⁴ identifies 5 priorities for the natural environment: Managing land sustainably, managing our water sustainably, achieving a net gain in biodiversity from new development, increasing investment in our natural environment and increasing our engagement with our natural environment. The Greater Manchester Combined Authority is charged with producing a Local Nature Recovery Strategy for the city region and a draft is expected in Autumn 2024. The GMCA has also produced Biodiversity Net Gain Guidance for Greater Manchester⁵ and published an Off-site Net Gain Scoping Study⁶ in 2021.

³ 25 Year Environment Plan (2018) https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/693158/25-year-environment-plan.pdf
⁴ https://www.greatermanchester-ca.gov.uk/media/1986/5-year-plan-branded_3.pdf
⁵ https://www.greatermanchester-ca.gov.uk/media/4244/gmca-bng-guidance-update_250221-final-edited.pdf
⁶ <https://www.greatermanchester-ca.gov.uk/media/5546/bng-offsite-scoping-study-december-2021.docx.pdf>





This biodiversity strategy provides a consideration of the current state of biodiversity in Bury

- 1.9 In March 2022, the Greater Manchester Combined Authority (of which Bury Council is a member) declared a “biodiversity emergency” and set out a series of projects and initiatives across the city-region which seek to recover and restore biodiversity, reverse habitat loss and explore what more can be done.
- 1.10 In doing so, Greater Manchester launched a new Green Spaces Fund (run through the Greater Manchester Environment Fund) for community groups wanting to create new spaces or improve existing ones in their local area.

Our Biodiversity Duty

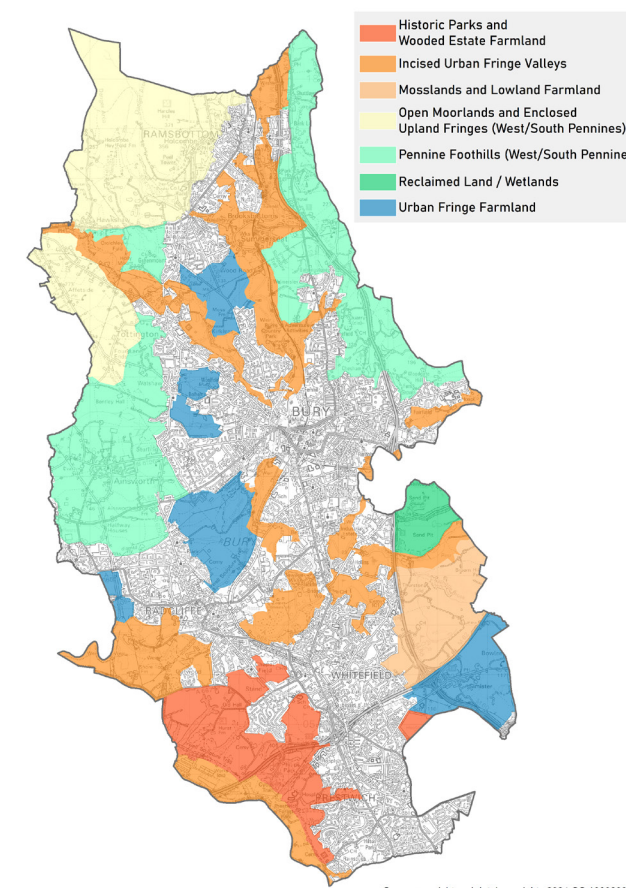
- 1.11 The Natural Environment and Rural Communities Act 2006, as amended by the 2021 Environment Act, gives public bodies the duty to conserve and enhance biodiversity.
- 1.12 By way of response, this biodiversity strategy provides a consideration of the current state of biodiversity in Bury, the key issues, and what we can do to conserve and enhance biodiversity. It outlines our objectives to conserve and enhance biodiversity in Bury and suggests future actions and policy directions.



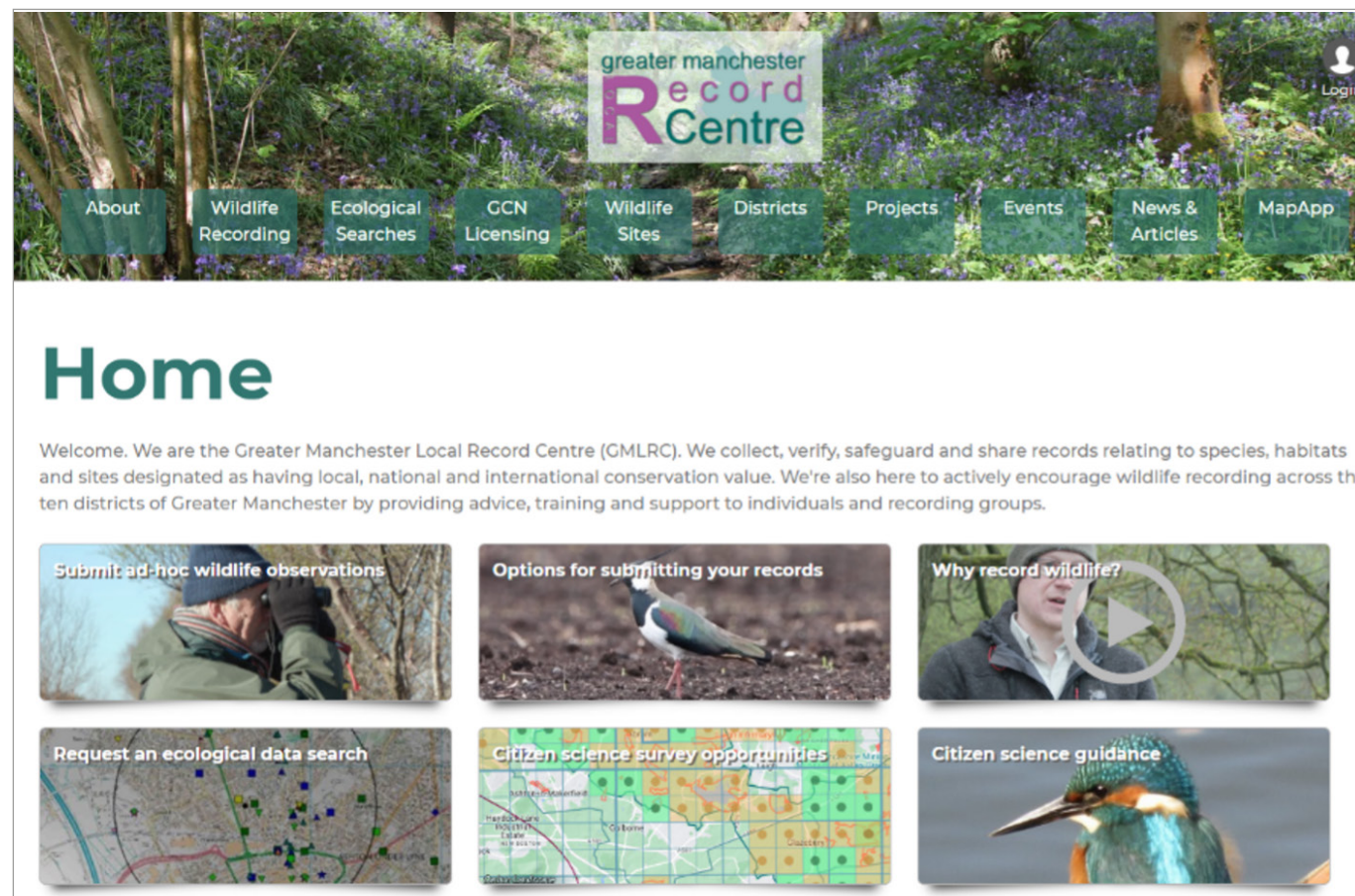
Woodland in Philips Park. Photo by Gui Castro

2. The current state of Biodiversity in Bury

- 2.1 The Borough has a wide range of landscapes and habitats. The land is undulating but incised and drained by the valleys of the Rivers Irwell and Roch. The Borough’s highest point is in the north, on the plateau of Holcombe Moor, reaching 418 metres above sea level on Bull Hill.
- 2.2 The River Irwell flows south through the borough, before turning west at its confluence with the River Roch, then south again at its confluence with the Croal. These river valleys not only provide an important habitat for wildlife, but also act as a corridor through which species can move, extending potential territories and increasing population viability.
- 2.3 Terrestrial habitats include important areas of moorland (upland heath and blanket bog), as well as broad-leaved clough woodland, such as Ringley Woods, much of which is ancient. Over 15% of the borough is semi-improved neutral grassland, with significant areas of unimproved acid and neutral grassland.
- 2.4 Bury has one of the highest concentrations of ponds in Greater Manchester together with a number of important lodges and reservoirs. The Manchester, Bolton and Bury Canal also runs through the Borough.
- 2.5 The Greater Manchester Local Record Centre (GMLRC)⁷, managed by the Greater Manchester Ecology Unit (GMEU), is responsible for local ecological data in Bury and the rest of Greater Manchester. It collects, verifies, safeguards and shares records relating to species, habitats and sites designated as having local, national and international conservation value.
- 2.6 We know that some species have experienced significant decline in Bury, such as hares, lapwing, martins and swifts. On the other hand, some species have expanded, such as roe deer, fox, badger and some butterfly. And important habitats remain.



The Borough’s landscape character areas (source: Bury Council Landscape Practice 2009)



GM Records Centre website



Brown Hare at Simister. Photo by Stuart Wilson

- 2.7 Bury's ponds and lodges support a diverse range of aquatic flora and fauna, including five species of amphibian, numerous damselflies and dragonflies, and many species of breeding and wintering wetland birds. They also provide important foraging areas for bats with nine species recorded in the borough.
- 2.8 Otter signs have recently been found on the River Irwell, and it is hoped this beautiful mammal will recolonise some of its former haunts over the coming years.
- 2.9 Parts of Bury remain a stronghold for farmland birds such as Skylark, Tree Sparrow, Grey Partridge and Barn Owl which live alongside Brown Hare, Rabbit and Fox.
- 2.10 Bury has an increasing problem with invasive species. Himalayan Balsam is now widespread, Japanese Knotweed is common and Giant Hogweed is a danger in many waterside locations.

In the animal world the arrival of Canada geese, grey squirrel, mink and signal crayfish have affected indigenous communities. Then there are diseases to contend with, such as ash die-back, chestnut canker and acute oak decline.

- 2.11 The biodiversity interest of the Borough is recognised in various site designations which receive some protection from policies in the Unitary Development Plan. Bury has:
 - 2 Sites of Special Scientific Interest
 - 49 Sites of Biological Importance
 - 13 ancient woodlands
 - 7 local nature reserves
 - A number of protected species such as badger, otter, barn owl, kingfisher, great crested newt, black necked grebe plus several bat species and winter visitors.
 - c112 km of wildlife links and corridors
- 2.12 Other features of wildlife interest that do not fall into the above categories gain some protection from Development Plan Policy EN6/3. All the policies are set out in the Appendix.
- 2.13 In the animal world the arrival of Canada geese, grey squirrel, mink and signal crayfish have affected indigenous communities. Then there are diseases to contend with, such as ash die-back, chestnut canker and acute oak decline.
- 2.14 Buildings also play a role in providing habitats and maintaining biodiversity in the borough. Several species such as bats, swifts, swallows, house martins and starlings use buildings for nesting.

Sites of Special Scientific Interest (SSSIs)

- 2.15 SSSIs are of national importance for their wildlife, geology or landform and are designated by Natural England. Bury has two SSSIs. One is a small part of the West Pennine Moors SSSI and the other is at Ash Clough on the Bury/Bolton boundary.
- 2.16 West Pennine Moors is designated for the quality of its mosaic of upland and upland fringe habitats and is notable for its skylark and curlew populations. Ash Clough is a river cliff important for the geology exposed.

Sites of Biological Importance (SBIs)

- 2.17 Bury currently has 49 Sites of Biological Importance, sometimes referred to as 'local sites', which are Bury's best sites for flora and fauna. They are surveyed and designated on behalf of Bury and the other districts of Greater Manchester by the Greater Manchester Ecology Unit. They are a category of site described nationally as 'sites of local biodiversity interest' and are protected by Unitary Development Plan Policies EN6/1 and EN6/2.



Redisher. Photo by James Hall

Bury currently has 49 SBIs which are the best sites for flora and fauna

3. What can we do to conserve and enhance biodiversity in Bury?

Local Nature Reserves

2.18 Nature reserves are designated by Local Authorities under the 1949 National Parks and Access to the Countryside Act as places for people to enjoy and learn about nature. In December 1997 Bury Council adopted a target, recommended by English Nature, of having one hectare of local nature reserve per 1000 people.

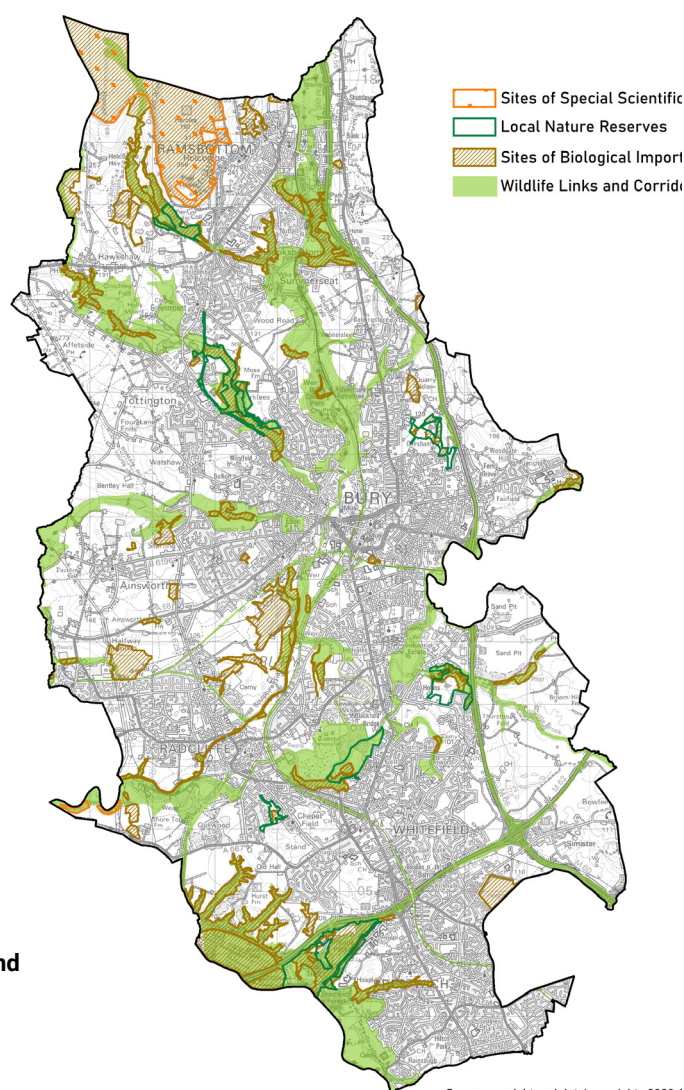
2.19 Bury currently has seven declared local nature reserves, which are protected by Unitary Development Plan EN6/2 at the following sites:

- Philips Park
- Chesham Woods
- Hollins Vale
- Redisher Woods
- Kirklees Valley
- Chapelfield
- Springwater Park

Wildlife links and corridors

2.20 Bury's UDP identifies c112 km of wildlife links and corridors which join together the designated sites, making them more valuable than they would be as isolated sites, since they permit dispersal and extend the territory available to species.

2.21 Natural England also keeps a record of Priority Habitats across the region. The maps are updated bi-annually so to see the current habitats' in Bury, please visit the Priority Habitat Inventory on data.gov.uk.



Bury currently has six declared local nature reserves

3.1 Without action, pressure from urban development, intensive land management practices, human disturbance, introduced diseases, invasive non-native species and climate change can be expected to further exacerbate the decline of the UK's biodiversity over the coming decades. Nevertheless, there are several things we can do in Bury as individuals, local community groups, businesses and the Council that can help conserve and enhance biodiversity.

Managing land for biodiversity

3.2 Bury Council is a major landholder in the Borough, so the way it manages its land – and its buildings - has a significant effect on local biodiversity. The land could have a variety of existing uses, from play areas to highway verges. Its 14 green flag-certified parks have management and maintenance plans that include proposals to increase biodiversity.

3.3 In recent years, the Council has taken a number of actions to manage its land in a way that benefits biodiversity:

- Using steam instead of chemicals to control weeds in green spaces.
- Ceasing to use glyphosate in schools and play areas except for the treatment of invasive or harmful species.
- Reducing highway spraying using glyphosate.
- Reducing grass cutting and identifying trial sites for wildflower seeding/re-wilding.
- Developing site management partnerships with 3rd sector organisations such as the Wildlife Trust (at Philips Park) and City of Trees (at Outwood).
- Supporting and working with local community groups and Bury Volunteer Rangers to improve the management of sites.
- Working with City of Trees to increase woodland in the Borough such as at Broad Oak, Redbank, Springwater, plus a number of schools and privately-owned sites.
- Working with the Environment Agency to plant trees and develop habitats as part of the Radcliffe and Redvales flood defence scheme.
- Working with a Community Interest Company to develop proposals and seek external funding for environmental projects. In the last year 4 local groups have been successful in attracting funding for their proposals from the Greater Manchester Greenspaces Fund.



Cutting back rhododendron. Photo by James Hall



Astley Tiny Fungi. Photo by James Hall



Kingfishers. Photo by Stuart Wilson

- 3.4 In the future, the Council could do more still for biodiversity by:
- Using its land as receptor sites for biodiversity net gain
 - Further changing maintenance or grazing regimes
 - Support residents, community groups and partners taking action for biodiversity on Council land.
 - Enhance native planting and semi-natural green spaces.
- 3.5 Sites which have been recognised as having existing biodiversity value merit special attention. Some of these sites are owned by the Council and others are in private ownership. We need to work with all landowners to encourage biodiversity-aware land management.

Advice and awareness

- 3.6 Although most people are well disposed towards the natural environment, people aren't always aware of the biodiversity that exists, how it functions and how it can be harmed. Some will welcome the opportunity or encouragement to get actively involved in improving biodiversity through initiatives such as 'No Mow May', installing nesting boxes in their gardens or creating hedgehog highways.
- 3.7 The Council works with local businesses, encouraging them to develop their environmental policies and practices.
- 3.8 The Council has supported and encouraged playschemes and forest schools on land it owns to encourage awareness of the natural environment. It works with Friends groups, Volunteer Rangers and with organisations such as the Wildlife Trust and City of Trees to organise activities and events. The Council intends to continue such work and expand it in the future.

Council policies and procedures

- 3.9 Biodiversity is a corporate issue. Many Council services will already be aware of this and taking action, but we must take all opportunities to improve policies and practices. Examples include:
- Parks – continuing to review management and maintenance plans for ways to benefit biodiversity.
 - Property – reviewing tenancies and licences to encourage biodiversity-aware land management practices.
 - Transport – air and noise pollution affect biodiversity so measures to reduce pollution and encourage low-carbon travel are beneficial.
 - Waste – litter and leachate can be harmful to biodiversity so Council management is important.
 - water – the quality of water in rivers and streams, and the morphology of watercourses has a bearing on what life they will sustain.
 - Procurement – the source of materials and use of local companies will have an impact on pollution.
 - Lighting – artificial light can have a negative impact on some species.

New development

- 3.10 New development can have an impact on biodiversity and current development plan policies aim to ensure that there are no unacceptable adverse impacts on key assets, such as SSSIs, SBIs, LNRs and wildlife links and corridors. If a proposal is judged to be harmful to the extent that the adverse impacts would outweigh the benefits of the proposal, it can be refused planning permission or mitigation can be required.
- 3.11 More frequently, the Council works with developers to reduce the impact of development, for example by including greenspace, or taking positive measures to accommodate wildlife, such as providing nesting places for swifts and swallows or roosts for bats.
- 3.12 In July 2024, the Council resolved to require best practice standards for inclusion of swift boxes in the new Bury Local Plan and ensure that any plans to re-roof the Council's housing stock is seen as an opportunity to install swift bricks.

Preparing for biodiversity net gain

- 3.13 The 2021 Environment Act placed a new duty on Local Planning Authorities to require a 10% increase in biodiversity value from new development requiring planning permission.
- 3.14 Biodiversity Net Gain became mandatory in two steps on 12 February and 2 April 2024. Bury Council and the Greater Manchester Ecology Unit, will begin monitoring and reporting on what is done to achieve biodiversity net gain, be it on or off development sites. The first report will be published before 2026.
- 3.15 The Greater Manchester Ecology Unit has undertaken a Needs and Supply Assessment for each GM district. The assessment estimates the potential off-site BNG need resulting from development in the borough, and the potential supply of BNG units on Council-owned land. We have used this to identify a number of council-owned potential sites across the Borough for biodiversity net gain and will utilise this evidence to inform the emerging Local Plan.
- 3.16 The Council commissioned the Greater Manchester Environment Trust (GMET) to prepare costed habitat improvement and management plans for seven of these Council-owned potential BNG sites: at Old Kays, Brandlesholme, Chesham Woods, Hollins, Springwater Park, Outwood and Philips Park. The GMET is a partnership between the Greater Manchester Combined Authority and the Wildlife Trust for Lancs, Greater Manchester and North Merseyside, which exists to bring together public, private and third sector bodies, communities and funders to address environmental issues.
- 3.17 The Greater Manchester Ecology Unit provides ecological advice to Bury Council on planning applications that are required to provide biodiversity net gain. It is recruiting an officer to monitor and verify the provision of net gain over the mandated minimum 30-year period.
- 3.18 Relevant Councillors and Officers will receive training on this new duty.



The 2021 Environment Act places a new duty on Local Planning Authorities

4.Objectives, Policies and Actions

- 4.1 This Strategy aims to:
- improve our understanding and awareness of biodiversity
 - consider biodiversity in all Council decision making
 - bring about the recovery of nature in the Borough, in line with national and city-region objectives and targets.
- 4.2 Delivering these objectives will require policies and actions. Strategic policies are included in the Places for Everyone Plan (PfE). Local Plan policies will build on the PfE policies and those in the previous Unitary Development Plan, which are listed in the Appendix.
- 4.3 Proposed actions are set out below:

Table 1 Objective 1: Improve our understanding and awareness of Biodiversity

Action	Lead	Measure	Target date
Encourage public reporting of species to GM Records Centre	Bury Council/ Wildlife Groups/ GMLRC	Number of reports	2024
Update the Register of SBIs	GMEU/ Bury Council	Annual review adopted for planning purposes by the Council	2020 review adopted by end 2023
Update Council webpages on biodiversity	Bury Council	Updated webpages	2024
Support local communities in acquiring and spreading understanding	Bury Council/ GMCA/ GMET/ Wildlife Trust	Number of groups and sessions	Ongoing

Table 2 Objective 2: Consider biodiversity in all Council decision making

Action	Lead	Measure	Target date
Implement mandatory BNG requirement	Bury Council	Delivery of Biodiversity Net Gain, use of guidance, directory and register	April 2024
Contribute to production of a GM Local Nature Recovery Strategy	GMCA / Bury Council	Production and adoption	2024
Adoption of the Places for Everyone Joint Development Plan	Bury Council	Use of PfE policies in planning decisions	2024
Update local planning policies for biodiversity through the Bury Local Plan	Bury Council	New Local Plan policies that reflect / reference / integrate the Biodiversity Strategy and LNRS	2026
Implement updated planning policies through the development management process	Bury Council	Use of Local Plan policies in planning decisions Use of Places for Everyone policies in planning decisions.	2024-2026
Adopt biodiversity recovery as a corporate objective	Bury Council	Environmental assessment section in cabinet reports	2024
Establish monitoring system for delivery off-site biodiversity gain	DEFRA, Greater Manchester Ecology Unit	Monitoring framework established	2024



Holcombe Moor. Photo by David Wiggins

Table 3 Objective 3: Bring about the recovery of nature in the Borough

Action	Lead	Measure	Target date
Encourage biodiversity-aware land management of all Council land	Bury Council	Changes in land management practices	ongoing
Identify public and privately-owned potential receptor sites for BNG	GMEU/ Bury Council	Completion of land audits	First 7 by June 2024
Encourage all landowners to accommodate BNG or Defra's Environmental Land Management Scheme	NFU/ DEFRA/ Bury Council/	Number of schemes	ongoing
Identify and produce management plans for Council-owned, potential BNG receptor sites	Greater Manchester Environment Trust	Production of first 7 plans and inclusion on the GM directory of receptor sites	2024
Deliver BNG on Council-owned sites	Bury Council/ GMET/GMEU	Number of sites on GM directory	2024
Seek external funding for priority sites, habitats and corridors	Bury Council/ partners/ community groups	Number of sites and lengths of corridor improved.	ongoing
Encourage householders and other property owners to encourage biodiversity.	Bury Council/ Wildlife Trust/ Property owners	The presence and abundance of key species.	ongoing
Support 'naturalisation' of watercourses to permit fish passage	Landowners/ Bury Council/ Irwell Catchment Partnership	Number of weirs removed or fish passes constructed	2030
Protect peatland by reducing use of peat	Bury Council	Amount of peat used	2028
Protect designated sites from invasive species	Landowners/ Bury Council	Number of designated sites with invasive species present	2026
The Council will expect relevant proposed developments to incorporate nesting or roosting opportunities for birds and bats.	GMEU/Bury Council	Number of developments with bat or bird boxes.	From 2024

5.Reporting and Monitoring

- 5.1 Our biodiversity strategy actions will be monitored annually.
- 5.2 Following the mandatory introduction of biodiversity net gain in 2024 and the adoption of Bury Biodiversity Strategy, we will also produce, no later than 1 January 2026, a report on how the Council is meeting its biodiversity duty. This report will be updated at least every 5 years.
- 5.3 This report will summarise the actions we have taken, the progress underway, and how we have met our biodiversity net gain obligations over the reporting period.



Barn Owl at Radcliffe. Photo by Stuart Wilson

6. Appendices



Photo by James Hall



Bluebells in Nuttall Park. Photo by Sophie Bleasdale

Legislation, guidance and policy

6.1 There are a number of acts of parliament, regulations and guidance that cover biodiversity. The 1981 Wildlife and Countryside Act was a key piece of legislation, but the duty of care for biodiversity by public bodies was significantly strengthened by the 2021 Environment Act.

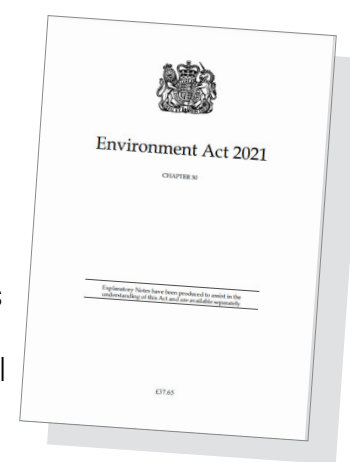
The Environment Act 2021

6.2 The Environment Act (2021) strengthens the duty on Local Authorities to conserve and enhance biodiversity⁸ and requires us to consider what we can do in Bury in order to conserve and enhance biodiversity.

6.3 There are two main biodiversity components of the Environment Act, the first being the National Nature Recovery Network which will identify and reconnect wildlife-rich places. This aims to:

- Enhance sites designated for nature conservation and other wildlife-rich places - newly created and restored wildlife-rich habitats, corridors and stepping stones will help wildlife populations to grow and move.
- Improve the landscape's resilience to climate change, providing natural solutions to reduce carbon and manage flood risk, and sustaining vital ecosystems such as improved soil, clean water and clean air.
- Reinforce the natural and cultural diversity of our landscapes, and protect our historic natural environment.
- Enable us to enjoy and connect with nature where we live, work and play - benefitting our health and wellbeing.

6.4 The second major element of the Environment Act is Biodiversity Net Gain. From January 2024 all qualifying development requiring permission now has to achieve a minimum of 10% net gain in biodiversity. This requirement became applicable to all major developments in February 2024 and small sites in April 2024.



- 6.5 This provides a legal requirement that any impact on biodiversity caused by development initiatives, where it cannot be avoided, will not only be compensated but will have to demonstrate a 10% biodiversity net gain.
- 6.6 The net gain approach, however, does not override the mitigation hierarchy of avoid, mitigate, compensate. In other words development proposals cannot merely jump to the compensation phase; they must first seek to avoid any harm to biodiversity. Neither does it override the protection for designated sites, protected or priority species and irreplaceable or priority habitats.

National Planning Policy Framework (NPPF)

6.7 The National Planning Policy Framework states that planning policies and decisions should contribute to and enhance the natural and local environment by protecting and enhancing valued landscapes and sites of biodiversity. It also states that policies and decisions should minimise impacts on and provide net gains for biodiversity⁹.

Places for Everyone (PfE)

- 6.8 'PfE' was adopted in March 2024 and forms an integral part of Bury's wider development plan. The Plan is a key tool in meeting Greater Manchester's ambition to become carbon neutral by 2038 and works in tandem with the Five-Year Environment Plan 2019-2024 produced by the Greater Manchester Combined Authority (GMCA).
- 6.9 The Places for Everyone (PfE) joint development plan document¹⁰ has an overall aim of achieving a major net enhancement of biodiversity value across the region.
- 6.10 Policy JP-G8, states the following:

⁹ NPPF Paragraph 174. a) & d) https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1005759/NPPF_July_2021.pdf
¹⁰ <https://www.greatermanchester-ca.gov.uk/what-we-do/planning-and-housing/places-for-everyone/>



The Plan will be a key tool in meeting Greater Manchester's ambition to become carbon neutral by 2038

⁸ Section 102 <https://www.legislation.gov.uk/ukpga/2021/30/section/102#section-102-2>

Policy JP-G8

A Net Enhancement of Biodiversity and Geodiversity

Through local planning and associated activities a net enhancement of biodiversity resources will be sought, including, where relevant, by:

1. Increasing the quality, quantity, extent and diversity of habitats, particularly priority habitats identified in national or local biodiversity action plans and those that support priority species;
2. Improving connections between habitats, to protect and enhance the provision of corridors, ecological networks (including Nature Recovery Networks) and stepping stones that enable the movement of species, especially as the climate changes;
3. Enhancing the management of existing habitats, including through habitat restoration, avoiding habitat fragmentation and combating invasive species;
4. Protecting sites designated for their nature conservation and/or geological importance, with the highest level of protection given to international and then national designations;
5. Facilitating greater access to nature, particularly within urban areas;
6. Supporting the development and implementation of the Great Manchester Wetlands Nature Recovery Network; and
7. Safeguarding, restoring and sustainably managing our most valuable soil resources, tackling soil degradation/erosion and recovering soil fertility, particularly to ensure protection of peat-based soils and safeguard 'best and most versatile' agricultural land.

Development will be expected to:

- a) Follow the mitigation hierarchy of:
 - i. Avoiding significant harm to biodiversity, particularly where it is irreplaceable, through consideration of alternative sites with less harmful impacts, then
 - ii. Adequately mitigating any harm to biodiversity, then
 - iii. Adequately compensating for any remaining harm to biodiversity
- b) Avoid fragmenting or severing connectivity between habitats;
- c) Achieve a measurable net gain in biodiversity of no less than 10%
- d) Make appropriate provision for long-term management of habitats and geological features connected to the development;
- e) Where appropriate, development should: mitigate air pollution impacts on Manchester Mosses SAC; mitigate urban edge, functionally linked land and recreation disturbance impacts on the South Pennine Moors SAC/SPAs; and assess and potentially mitigate boat movement, water pollution, and light spillage and shading impacts on the Rochdale Canal SAC; and
- f) Development proposals should be informed by the findings and recommendations of the appropriate biodiversity/ecological assessment(s) in the PfE evidence base and/or any updated or appropriate biodiversity/ecological assessments submitted as part of the planning application process.

Bury Local Plan

- 6.11 We are currently in the process of preparing a new Local Plan that will guide future development in the borough.
- 6.12 Together, the Places for Everyone (PfE) joint development plan and the Local Plan will form the main elements of Bury's overall development plan and, once adopted, these documents will both be used as the basis for determining future development proposals for the next 20 years or so.
- 6.13 Whereas PfE deals with strategic planning matters that are of significance across the plan area (such as identifying future levels of housing and employment growth), Bury's Local Plan will contain a range of locally-specific planning policies and identify local sites where development should be built as well as areas where development should be restricted or controlled.
- 6.14 Until a new Local Plan is adopted, the Unitary Development Plan (UDP) provides some important protection for sites with designation for biodiversity value. It includes the following policies:

EN6/1 - Sites of Nature Conservation Interest (Sites of Special Scientific Interest, National Nature Reserves and Grade A Sites of Biological Importance)

Planning permission will not be granted for development in or in the vicinity of a designated or proposed site of national or county/regional importance (Site of Special Scientific Interest or National Nature Reserve or Site of Biological Importance which has been identified as of national or county/regional importance i.e. Grade A) which would destroy or adversely affect, either directly or indirectly, the nature conservation interest of the site, unless it can be demonstrated that other material considerations outweigh the special interest of the site.

EN6/2 - Sites of Nature Conservation Interest (Local Nature Reserves and Grade B and C Sites of Biological Importance)

Planning permission will not be granted for development which would damage either directly or indirectly, the nature conservation interests of sites of particular ecological significance (Local Nature Reserves or Grade B and C Sites of Biological Importance) unless conditions can be imposed that would acceptably mitigate those impacts.

EN6/3 – Features of Ecological Value The effect of land use changes on existing features of ecological or wildlife value will be taken into account when assessing development proposals. Any proposal should seek to retain such features and incorporate them into the development.

EN6/4 - Wildlife Links and Corridors The Council will seek to consolidate and, where appropriate, strengthen wildlife links and corridors, and will not permit development which would adversely affect identified areas. In particular, the Council will seek to ensure that new development within or adjacent to identified links or corridors contributes to their effectiveness through the design, landscaping and siting of development proposals and mitigation works, where appropriate.



Peel Tower from Nuttall Park.
Photo by Sophie Bleasdale



We are currently in the process of preparing a new Local Plan that will guide future development in the borough

Greater Manchester Local Nature Recovery Strategy (LNRS)

- 6.15 In August 2020, the government announced that five local authorities would test how the recovery of England's landscapes and wildlife can be driven locally. To do this, "Local Nature Recovery Strategy" (LNRS) pilot studies were set up in each of the five areas to help map the most valuable sites and habitats for wildlife in their area and identify where nature can be restored.
- 6.16 Greater Manchester was one of these pilots. The Greater Manchester LNRS¹¹ pilot ran from autumn 2020 to summer 2021. It brought together stakeholders across the city-region to set out local priorities for restoring and linking up habitats to tackle the biodiversity emergency and agree the best places to do that and, at the same time, deliver wider benefits for people and the environment.
- 6.17 As a member of the Greater Manchester Combined Authority, we have been involved in the preparation of the Pilot LNRS for Greater Manchester (2021). The pilot report and the prototype strategy produced as part of the pilot does not have a formal status like documents such as the Greater Manchester 5 Year Environment Plan. This pilot can be used to inform the risks and opportunities that development may have on a specific area and to help mitigate habitat loss or enhance habitat.
- 6.18 A formal local nature recovery strategy (LNRS) for Greater Manchester will be prepared by GMCA. This will be a locally led strategy for nature and environmental improvement required by the Environment Act 2021. The strategy will provide an overview of how certain habitats fit into the wider network or mosaic of the city-region.
- 6.19 We will continue to support the production and delivery of the first formal LNRS for Greater Manchester. The LNRS will be a key document to help us understand how we can improve habitats on land we own and manage and we will utilise this as a key evidence base document for the production of local planning policies.
- 6.20 Over the coming months, we will be involved in the early stages of the LNRS' production, which will include evidence gathering, stakeholder engagement, and workshops to agree core nature recovery areas, opportunity areas, and mapping methods. It is expected that a draft LNRS for Greater Manchester will be published for public consultation in Autumn 2024.
- 6.21 The LNRS will:
- agree priorities for nature's recovery;
 - map the most valuable existing areas for nature; and
 - map specific proposals for creating or improving habitat for nature and wider environmental goals.

¹¹ https://gmgreencity.com/resource_library/local-nature-recovery-strategy/

Species Conservation Strategies and Protected Sites Strategies

- 6.22 Under s109 of the Environment Act 2021, Natural England can publish species conservation strategies to safeguard the future of the species that are at greatest risk. The strategies will find ways to comply with existing legal obligations to protect species at risk and to improve their conservation status.
- 6.23 Protected site strategies (Environment Act 2021 s110) take a new approach to protecting and restoring species and habitats in protected sites. Protected site strategies will provide ways to overcome pressures arising from plans or projects in the strategy area.

Bury Climate Action Strategy and Plan

- 6.24 The Bury Climate Action Strategy (2021)¹² makes it clear that for Bury to meet its carbon-neutral target, green and blue spaces need to be enhanced and improved for sustainable use and biodiversity.
- 6.25 The action plan (2024)¹³ sets out actions for the natural environment that the council can participate and lead on including but not limited to:
- Working toward planting 3 million trees within 5 years in Greater Manchester – work is ongoing with Cities of Trees to increase tree-planting within the Borough
 - Enhancing natural capital – many green spaces are now not actively managed and are left to grow naturally to promote biodiversity and reduce maintenance related emissions
 - Managing Council owned land and road verges to increase biodiversity and draw down carbon pollution including reductions in pesticide use and increased wildflower planting
 - Work with schools to better use green spaces and promote biodiversity
 - Keeping up to date with carbon offsetting opportunities and consider the practicality and reliability of using these means to meet our target – the Greater Manchester Environment Fund has been established as a way of managing funding for biodiversity and carbon offsetting projects
- 6.26 It also suggests actions that individuals can take such as:
- Utilising your garden to encourage wildflowers and biodiversity
 - Consider joining one of the local community groups within your local park to help us maintain them to a high standard
 - Check out local projects that are ongoing and get involved with them
 - Adopting environmentally friendly ways to get rid of weeds and stop using weedkiller

¹² [bury-climate-action-strategy](#)

¹³ [bury-climate-action-plan](#)



River Irwell at Burrs. Photo by Sophie Bleasdale



Swans on nest. Photo by Barry Aldous

Inspired to take action?

For more information, why not visit the links below to find out how you can help biodiversity.

- Your garden, balcony or yard, no matter how big or small, has the potential to be a haven for wildlife. Visit Lancashire Wildlife Trust's website for some tips on how to get started: <https://www.lancswt.org.uk/my-wild-garden>
- Every action counts. GM Green City have a wide range of resources to help: <https://gmgreencity.com/interests/natural-environment/>
- Want to encourage more birds in your area? RSPB have lots of handy tips for supporting wildlife on their website: <https://www.rspb.org.uk/helping-nature/what-we-do>

Bury
Council

This page is intentionally left blank

Draft Bury Biodiversity
Strategy 2023
Consultation Summary
Report

July 2024

Contents

1.	Introduction.....	3
2.	Consultation findings	3
	The current state of biodiversity in the Borough.....	3
	Proposals for land management.....	8
	Providing advice and increasing awareness	11
	Objectives of the Biodiversity Strategy	13
	Additional comments	19
3.	Schedule of amendments to draft strategy	24

1. Introduction

- 1.1 This report summarises the consultation on the draft Biodiversity Strategy for Bury and responses to it.
- 1.2 The 'biodiversity duty' expanded by the 2021 Environment Act requires public authorities who operate in England to consider what they can do to conserve and enhance biodiversity. The draft Bury Biodiversity Strategy was produced in response and approved by Cabinet for consultation on 13 December 2023.
- 1.3 The draft Strategy was subject to stakeholder and public consultation from 9 January 2024 to the 20 February 2024, and the Strategy has now been updated in response to the consultation.

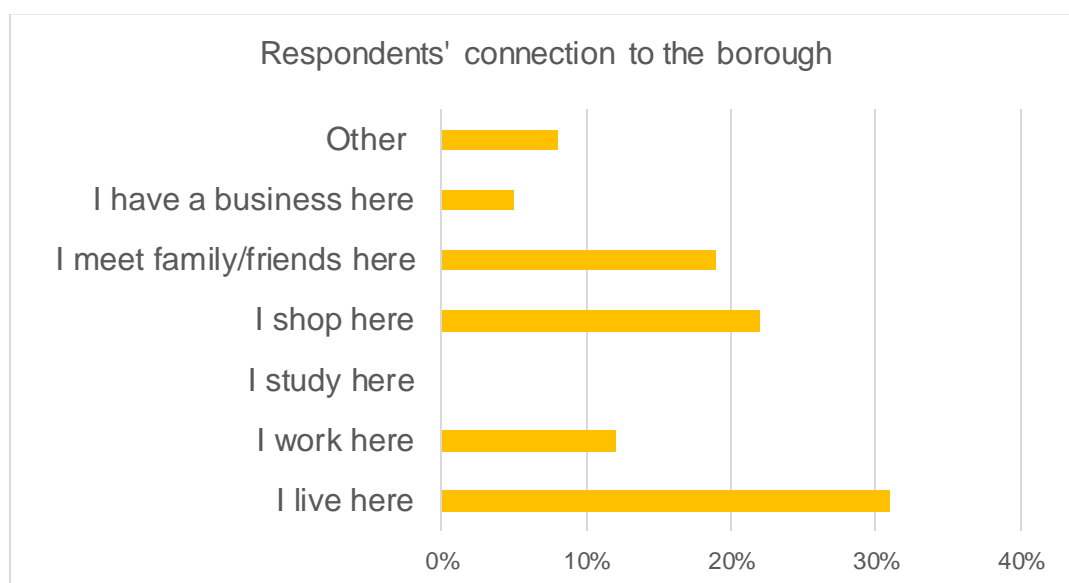


Figure 1 - Respondents' connection to the Borough

2. Consultation findings

The current state of biodiversity in the Borough

- 2.1 52.4% of respondents agree or strongly agree that the strategy reflects the current state of biodiversity in the borough. 23.8% remained neutral. 23.8% disagree or strongly disagree.

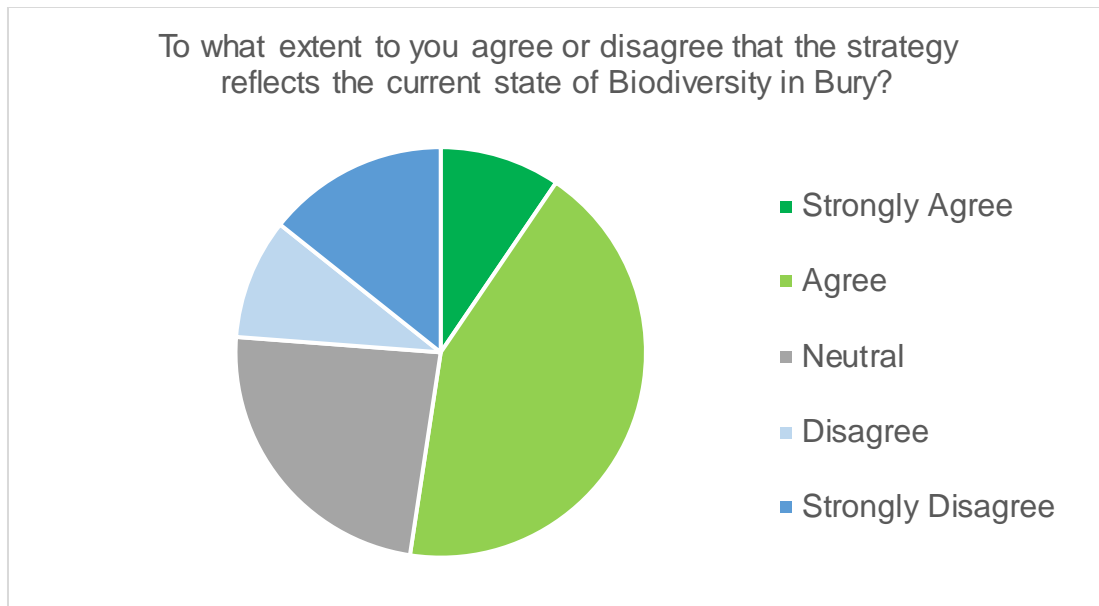


Figure 2 – Respondents' opinions about whether the Strategy reflects the current state of biodiversity in the Borough

- 2.2 When asked to give a reason for their answer, respondents stated the following:

Summary of comment	Response	Change required
Stop development of PfE allocation JPA7 Elton Reservoir as this is where the biodiversity is.	The Places for Everyone Plan was found sound following an independent examination which considered all ecological evidence for the Elton Reservoir site. The Plan was subsequently adopted by full Council with effect from 21 March 2024.	No change
It reads well however, there isn't the staff or skill set to identify all that Bury has.	The Greater Manchester Ecology Unit (GMEU) provides specialist advice to Bury Council on biodiversity, nature conservation and wildlife issues.	No change
The plan doesn't state measured site goals.	Section 4 of the strategy outlines the Council's goals.	No change
The development and maintenance of borough records with regard to Biodiversity are not well known to the general	Objective 1 of the Strategy is to Improve our understanding and awareness of Biodiversity	No change

public. For the strategy to be significant the education/informing of the residents in terms of Biodiversity needs to be stronger.	<p>through the following actions:</p> <ul style="list-style-type: none"> - Encourage public reporting of species to GM Records Centre - Update Council webpages on biodiversity - Support local communities in acquiring and spreading understanding 	
The strategy should make a difference.	Support noted	No change
Lack of detail and it would be helpful to understand where some of the conclusions have come from.	The Strategy is the first step in considering what the Council can do to help biodiversity. The Strategy has been written in consultation with the Greater Manchester Ecology Unit (GMEU).	No change
Questions how SBI sites are going to achieve the biodiversity targets.	The Greater Manchester Ecology Unit (GMEU) monitor the Sites of Biological Interest in the Borough on a regular basis. However a number of these sites are privately owned and the Council has no control over their management.	No change
Suggests that as part of the strategy SBIs are reassessed to determine current condition and a new management plan is drafted to ensure a good quality habitat.	The Greater Manchester Ecology Unit (GMEU) monitor the Sites of Biological Interest in the Borough on a regular basis.	No change
I agree with those listed but would say buildings should be included as they are a key habitat for species like	This is an omission.	Chapter 2 amended to incorporate the role that

bats, swifts and swallows amongst others.		buildings play in the borough for nesting.
Fair reflection of our current biodiversity	Support noted	No change
Bury has lots of green spaces but I think they should be better protected and I would like to see more biodiversity. Hedgehog highways would be good.	This is an omission.	Chapter 3 amended to incorporate reference to creation of hedgehog highways as an action that the general public could take.
Whilst good work is being done, much more could be done within the town itself, such as provision of nest boxes, swift and bat bricks, house martin nests, etc.	Support noted. The Council resolved to require best practice standards for inclusion of swift boxes in the new Bury Local Plan in July 2024 and ensure that any plans to re-roof the Council's housing stock is seen as an opportunity to install swift bricks.	Chapter 2 amended to incorporate the role that buildings play in the borough for nesting.
There is a great deal of countryside to the north of Bury and interlinked parks which are not being utilised	The Greater Manchester Local Nature Recovery Strategy will identify opportunities for linking up green spaces for nature recovery.	No change
Giant Hogweed is infesting our valleys	Paragraph 2.10 recognises Bury has an increasing problem with invasive species including giant hogweed.	No change
Statement about otters is wrong. Otters are breeding at Elton Reservoir.	Paragraph 2.8 states that otter signs have recently been found on the River Irwell.	No change
At 1.11 Insert "legal" before "duty"	The Act is a legal document and therefore it is already implied.	No change

Reference to 6 protected species is wrong. Elton Reservoir Basin has hosted thirty four Schedule 1 Protected birds since 2017. It has hosted 29 Section 41 Priority Species bird species since 2017	The list includes winter visitors however the number should be amended to clarify that this is a list of examples rather than a complete record.	Chapter 2 amended to broaden list and avoid confusion that this is not a comprehensive list, rather that it is a list of example species.
The SBI Map on Page 10 is out of date (only partially updated). You omit the SBI extension to Wetland Near Radcliffe, whilst Close Park Heronry is a new SBI.	This map is the latest adopted update.	No change
You could do a whole new section on the Priority Habitats shown on MAGIC map near Elton Reservoir	This strategy does not seek to assess the condition of specific sites in the Borough.	No change
Should talk about wetlands.	This is an omission.	Chapter 2 amended to update the Landscape Character area Map which includes the reclaimed land/wetland areas in the borough.
Disagrees with the inclusion of PfE Policy JPG9 and the PfE Plan.	The Places for Everyone Plan was found sound and was adopted by full Council with effect from March 2024.	No change
Make a commitment to Priority Species and Priority Habitats	Specific measures will be developed through the implementation of the strategy.	No change
2.9 excludes farmland bird Lapwing.	The listed species are examples rather than a comprehensive list.	No change
Concerns about wildflower seedings. You make it expensive to plough and sow, and when it is over	This feedback will be provided to the Operations team.	No change

flowering it looks rubbish and people complain. All you need to do it treat some of the verges like a hay meadow and the species will come back.		
--	--	--

Proposals for land management

- 2.3
- 52.4% of respondents agree or strongly agree with the proposals for land management in Bury. 19% remained neutral. 28.5% disagree or strongly disagree.

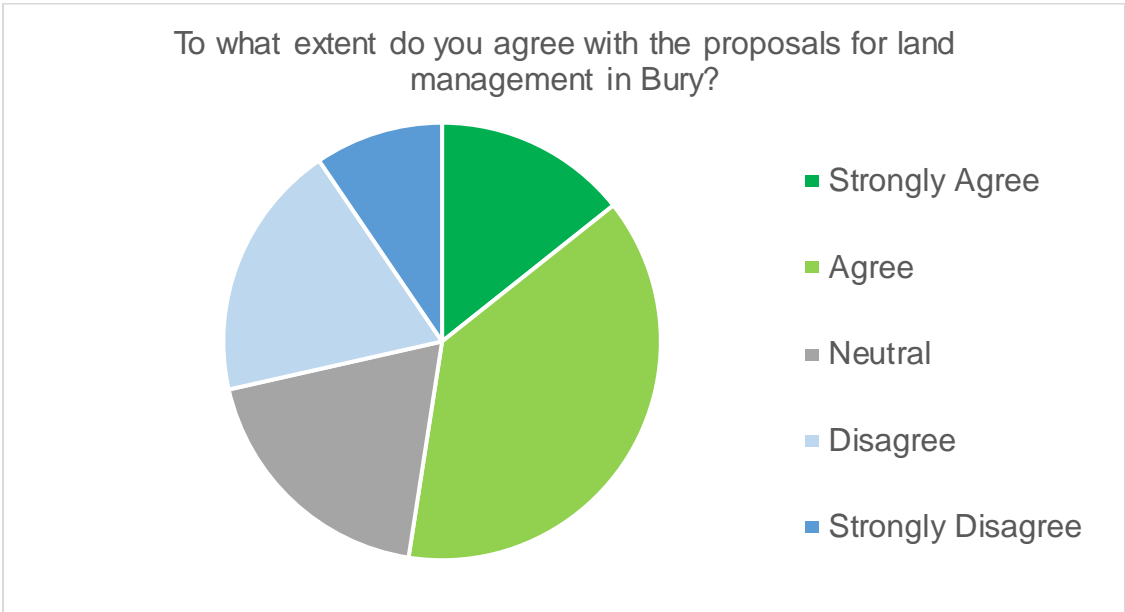


Figure 3 – Respondents’ opinions about the proposals for land management in Bury

- 2.4
- When asked to give a reason for their answer, respondents stated the following:

Summary of comment	Response	Change required
Stop development of PfE allocation JPA7 Elton Reservoir as this is where the biodiversity is.	The Places for Everyone Plan was found sound following an independent examination which considered all ecological evidence for the Elton Reservoir site. The Plan was subsequently adopted by full Council with effect from 21 March 2024.	No change

Bury council and other agencies have shown a lack of commitment and enforcement. Reports of industrial fly tipping and pollution at all levels has not been enforced.	The Council is committed to enforcement and will respond accordingly where known breaches occur.	No change
No detailed goals or actions	Section 4 of the strategy outlines the Council's goals.	No change
Tying in biodiversity strategies with land ownership and potential ownership/purchase of bio important land should be an important aspect of the policy going forward	This will be considered in the implementation of the strategy.	No change
Bury council are the largest land owners.	It is recognised that Bury Council is a large landholder in the borough in the section of the Strategy : Managing land for biodiversity.	No change
Page 11 has many useful ideas, however again it does not present any detail. Par 3.9 & 3.14 are the link but they do not give any detail of what will actually change. It is assumed that many of the parties listed will also provide the funding.	Page 11 presents specific actions the Council has taken to manage its land in a way that benefits biodiversity and this is considered to be a sufficient level of detail. Paragraph 3.9 includes examples of how several services could take opportunities to improve policies and practices. This is considered to be a sufficient level of detail. 3.15 indicates the next steps related to paragraph 3.14.	No change
I would like to see specific measures and sites listed like living walls and roofs on new buildings, integrated bird bricks on all new builds.	Specific measures will be developed through the implementation of the strategy however, the strategy has been amended to incorporate the role of buildings as habitats.	Chapter 2 amended to incorporate the role that buildings play in the borough for nesting.

I agree with ideas listed but would like to see more action, stopping, not reducing, glyphosate use.	Specific measures will be developed through the implementation of the strategy.	No change
Bury council needs to do a great deal more to preserve our existing sites, and nature trails including not allowing building on wildlife corridors and habitats.	Various types of green spaces, including wildlife corridors, are protected from development that would have an adverse impact by policies in the Unitary Development Plan and the Places for Everyone Plan.	
Management of Kirklees trail is poor, no woodland management or management of the ponds for wildlife.	This feedback will be provided to the Operations team.	No change
Would like better protection for our green spaces and them to be fully protected against development.	Various types of green spaces are protected from development that would have an adverse impact by policies in the Unitary Development Plan and the Places for Everyone Plan.	No change
I agree with the above, but buildings should also be recognised as wildlife habitats, eg building dependent species	Support noted. An amendment is proposed in order to recognise the value of buildings for particular species. Specific measures to support local communities will be developed through the implementation of the strategy.	Chapter 2 amended to incorporate the role that buildings play in the borough for nesting.
I agree with the points but also feel that there is zero point in trying to artificially manufacture these habitats when instead we could focus on clean up all the trash, to reduce microplastic pollution which impacts the microbiome of the soil and subsequently the biodiversity of any vegetation that grows.	Specific measures will be developed through the implementation of the strategy.	No change

Questions quality of ecologists. Asks the Council to report any consultancy that fails to prepare adequate information.	This is not a matter covered by the strategy.	No change
Concerns that 'mitigation' is just lip service and destroys habitats.	Mitigation helps to reduce harmful impacts and enhance positive impacts for the environment.	No change
Concerns that greenspace provided by developments will just be developed at a later date.	Policy RT1/1 of the Bury Unitary Development Plan protects green space by developments	No change

Providing advice and increasing awareness

- 2.5 66.6% agreed or strongly agree with the proposals for providing advice and increasing awareness. 19% remained neutral. 14.3% disagree or strongly disagree.

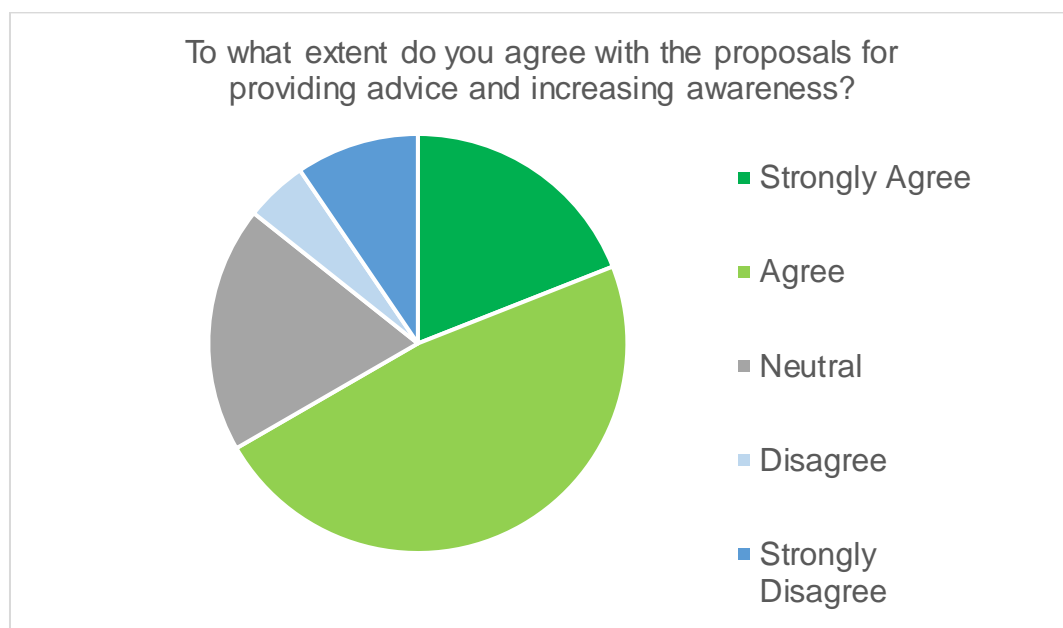


Figure 4 – Respondents' opinions about providing advice and increasing awareness in the borough

- 2.6 When asked to give a reason for their answer, respondents stated the following:

Summary of comment	Response	Change required
--------------------	----------	-----------------

Stop development of PfE allocation JPA7 Elton Reservoir as this is where the biodiversity is and local people are aware – they are trying to save nature	The Places for Everyone Plan was found sound following an independent examination which considered all ecological evidence for the Elton Reservoir site. The Plan was subsequently adopted by full Council with effect from 21 March 2024.	No change
Needs dedicated resource, at the moment not many authorities have a dedicated biodiversity officer.	Specific measures will be developed through the implementation of the strategy.	No change
It will help more people to get involved.	Support noted.	No change
This work is already on-going with these parties and whilst it should be encouraged and developed further, the key will be what other NEW initiatives and ways forward is the Borough considering and how will it take this forward. There appears to be a great deal of reliance on 3rd parties which whilst essential should not be seen as the only way forward.	Specific measures will be developed through the implementation of the strategy.	No change
more needs to be done	The Biodiversity Strategy includes a number of measures that will improve advice and awareness of Biodiversity in the borough.	No change
Getting residents involved and engaged with nature will encourage people to protect what we have	Support noted	No change
People need to be engaged in easy, accessible and practical ways or it will come across as patronising.	Specific measures will be developed through the implementation of the strategy.	No change

Good to get people involved.	Support noted	No change
Defamatory comments.	The Greater Manchester Ecology Unit (GMEU) provides specialist advice to Bury Council on biodiversity, nature conservation and wildlife issues. They are a collection of highly qualified and experienced ecologists.	No change

Objectives of the Biodiversity Strategy

2.7 The Biodiversity Strategy proposes 3 objectives:

Objective 1: Improve our understanding and awareness of biodiversity in Bury.

Objective 2: Consider biodiversity in all Council decision making.

Objective 3: Bring about the recovery of nature in the Borough in line with national and city-region objectives and targets.

2.8 90.4% of respondents agree or strongly agree with Objective 1. 4.8% remained neutral and 4.8% strongly disagree with Objective 1.

2.9 85.7% of respondents agree or strongly agree with Objective 2. 4.8% remained neutral. 9.6% disagree or strongly disagree.

2.10 76.2% of respondents agree or strongly agree with Objective 3. 9.5% remained neutral. 14.3% disagree or strongly disagree.

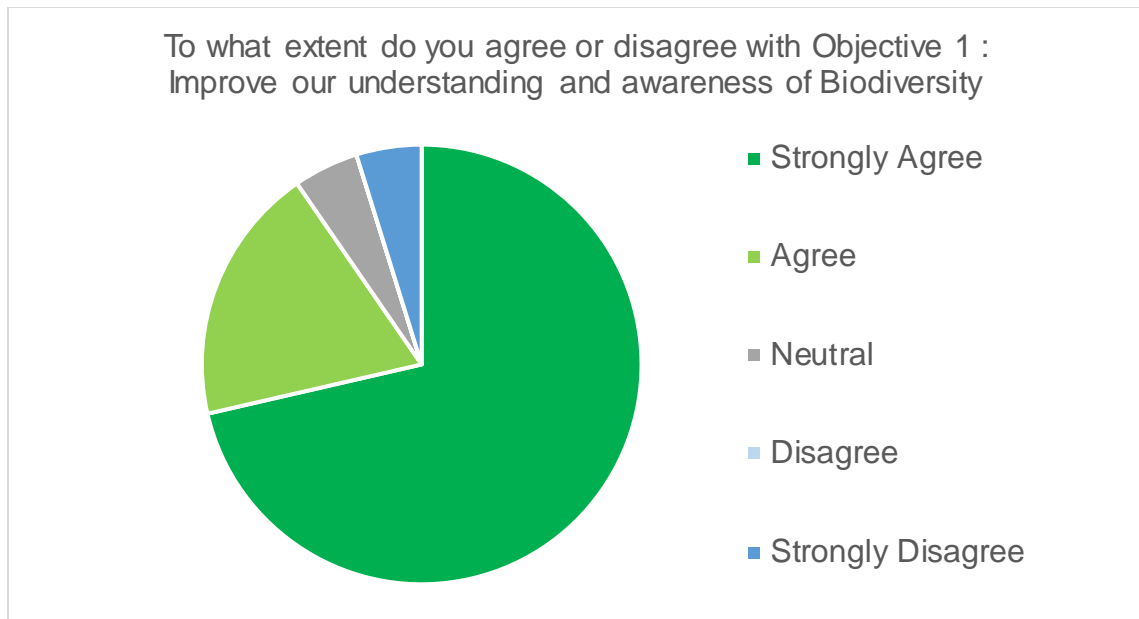


Figure 5 – Respondents' opinion on Objective 1

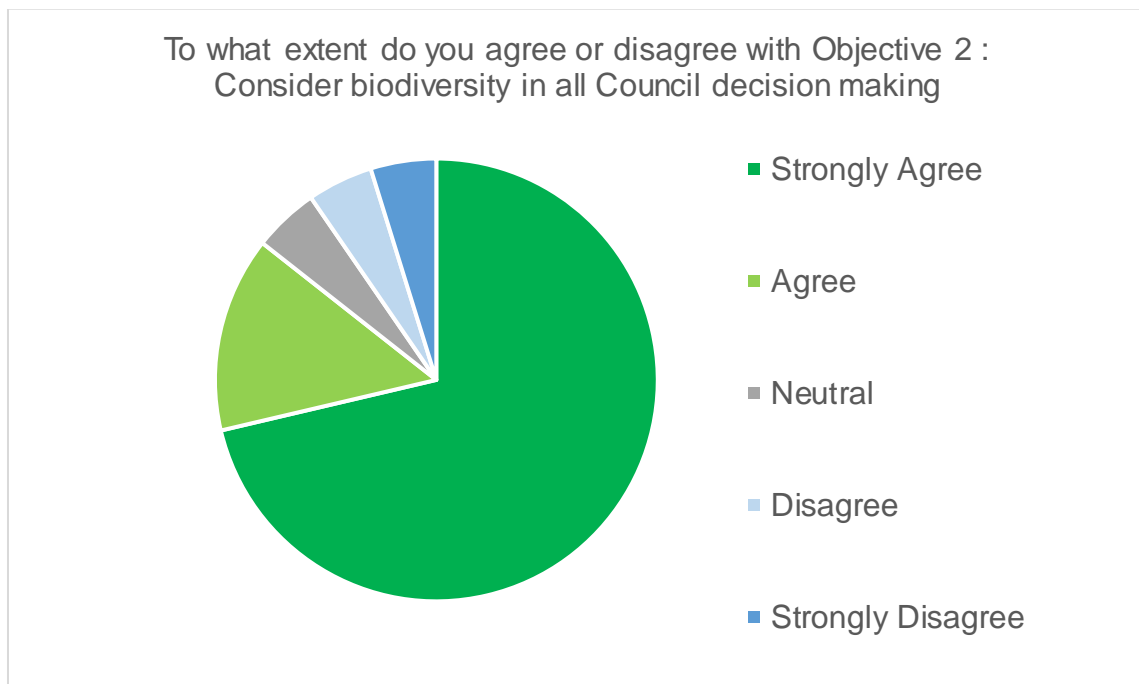


Figure 6 - Respondents opinion on Objective 2

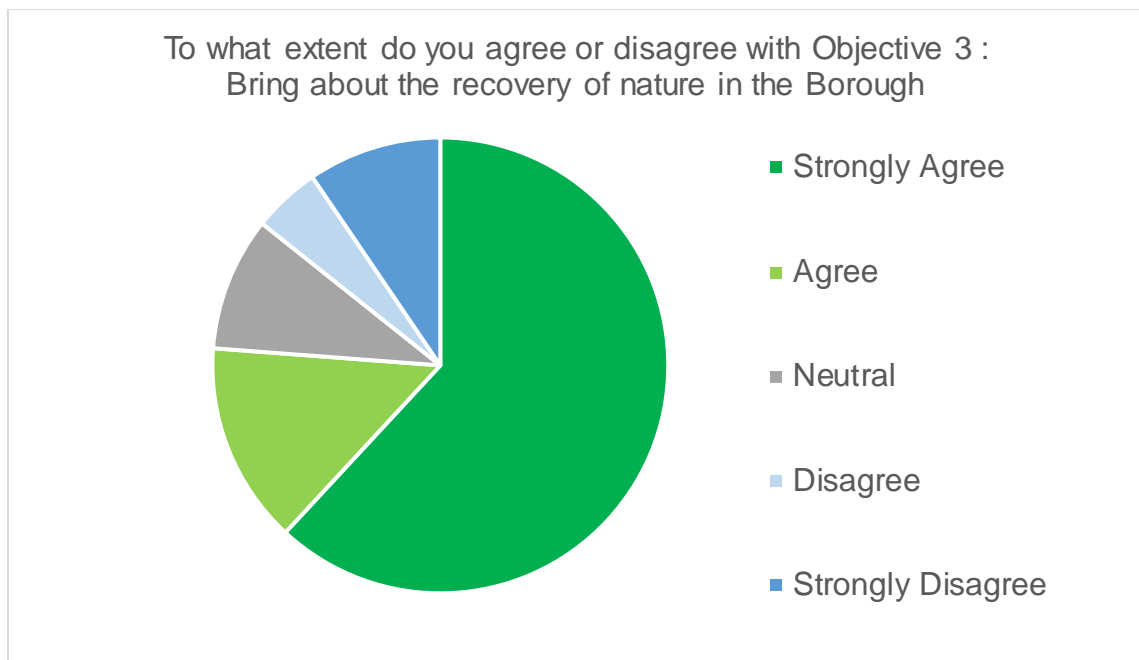


Figure 7 - Respondents opinions on Objective 3

2.11 When asked to give a reason for their answer, respondents stated the following:

Summary of comment	Response	Change required
Stop development of PfE allocation JPA7 Elton Reservoir as this is where the biodiversity is. Do not build on green land.	The Places for Everyone Plan was found sound following an independent examination which considered all ecological evidence for the Elton Reservoir site. The Plan was subsequently adopted by full Council with effect from 21 March 2024.	No change
With stated achievable goals for each SBI LNR.	Specific measures will be developed through the implementation of the strategy.	No change
There is plenty about Bury Biodiversity that has previously been consolidated but is in danger of slipping down the ranks of importance due to cash constraints. The Borough's parks have been exemplary for years but are now in decline due to resources. This trend needs to be reversed if the biodiversity	This comment isn't about the objectives, but the implementation of them. Specific measures will be developed through the implementation of the strategy.	No change

policy outcomes are to be achieved.		
So much wildlife is in decline.	Paragraph 1.3, 1.5-1.7, and 2.6 refer to the decline in wildlife.	No change
The three objectives are key to the success of the strategy.	Support noted.	No change
I am concerned about the loss of habitat for wildlife with the proposed development of the Elton Reservoir area and green spaces that surround it.	The Places for Everyone Plan was found sound following an independent examination which considered all ecological evidence for the Elton Reservoir site. The Plan was subsequently adopted by full Council with effect from 21 March 2024. The allocation includes the requirement to provide a substantial accessible green infrastructure corridor and country park.	No change
I would like to see a list of actions that will be taken, like hedgehog highways and bird bricks in new developments.	Specific measures will be developed through the implementation of the strategy however we have amended the strategy to incorporate the role that buildings play in the borough for nesting and the creation of hedgehog highways as an action that the general public could take	Chapter 2 amended to incorporate the role that buildings play in the borough for nesting and Chapter 3 amended to incorporate reference to creation of hedgehog highways as an action that the general public could take
I have a young family and want my son to see as much I did growing up in Bury	Comment noted.	No change
It would be nice for Bury to become a leader in biodiversity and show other councils what can be achieved. Working with the	Specific measures will be developed through the implementation of the strategy.	No change

RSPB and other similar charities, Bury could become a beacon for biodiversity.		
The onus needs to be on Bury council members getting up to date with all the latest research, as well as the traditional, and oft-forgotten old ways of managing land in line with nature.	Specific measures will be developed through the implementation of the strategy.	No change
All for biodiversity and considering biodiversity in council decisions.	Support noted.	No change

- 2.12 66.7% of respondents agree or strongly agree with the proposed actions to meet these three objectives. 9.5% remained neutral. 23.8% disagree or strongly disagree. Respondents provided the following feedback:

Summary of comment	Response	Change required
Stop development on green land and of PfE allocation JPA7 Elton Reservoir as this is where the biodiversity is. Strategy is for show	The Places for Everyone Plan was found sound following an independent examination which considered all ecological evidence for the Elton Reservoir site. The Plan was subsequently adopted by full Council with effect from 21 March 2024.	No change
Strategy is too general and meaningless	The strategy sets out three key objectives, and 21 actions, to support Biodiversity in Bury. Specific measures will be developed through the implementation of the strategy.	No change
Needs dedicated resource to carry through required outcomes	Resourcing will be considered through the implementation of the strategy.	No change
Something needs to be done now.	Once the Strategy is adopted, the measures set out within it will guide actions going forward	No change

There is a lack of commitment to objectives it is unclear how they will be implemented. Overall it would be helpful to have examples of actual action that will be undertaken.	Specific measures will be developed through the implementation of the strategy.	No change
I agree with all the actions listed but would like the council to decide on priority species including Swifts, Hedgehogs, Lapwings and consult with local groups and put mandates in planning to ensure developments have to comply with recommendations.	Specific measures will be developed through the implementation of the strategy.	No change
Would like to see more species specific aims, adopt a list of local priority species and take specific actions to help e.g. Hedgehog highways and swift bricks	Specific measures will be developed through the implementation of the strategy.	No change
You need to put your actions into practice and really make a difference to our beautiful borough which could be so much more in terms of biodiversity	Once the Strategy is adopted, the measures set out within it will guide actions going forward	No change
I want more definite plans, like hedgehog highways and swift bricks in all new builds	Specific measures will be developed through the implementation of the strategy however we have amended the strategy to incorporate the role that buildings play in the borough for nesting and the creation of hedgehog highways as an action that the general public could take Additionally, the Council resolved to require best practice standards for inclusion of swift boxes in the new Bury Local Plan in July 2024 and ensure that any plans to re-roof the Council's housing stock is seen as an opportunity to install swift bricks.	Chapter 2 amended to incorporate the role that buildings play in the borough for nesting and Chapter 3 amended to incorporate reference to creation of hedgehog highways as an action that the general public could take

It's not the big headlines that make impactful, longlasting change, it's the little things, such as encouraging the community to have pride in their town and the environment, showing people how easy it is to attract pollinators and wildlife to their gardens, and actively promoting real lawns and taxing the artificial lawn companies that are polluting our neighbourhoods.	In table 1 of the strategy, an action to support local communities in acquiring and spreading understanding is proposed. Specific measures to deliver this action will be developed through the implementation of the strategy.	No change
Could be more specific plans.	Specific measures will be developed through the implementation of the strategy.	No change

Additional comments

- 2.13 When asked if they felt whether anything was missing from the Bury Biodiversity Strategy that should be included, respondents suggested the following gaps:

Summary of comment	Response	Change required
Stop development of PfE allocation JPA7 Elton Reservoir as this is where the biodiversity is.	The Places for Everyone Plan was found sound following an independent examination which considered all ecological evidence for the Elton Reservoir site. The Plan was subsequently adopted by full Council with effect from 21 March 2024.	No change
Have a dedicated resource/set a minimum level of resource.	Resourcing will be considered through the implementation of the strategy.	No change
It would be helpful to have additional links on how people could help. A link to a map of the Borough showing the various habitats.	Noted	The end of the document now includes links to several helpful resources.

The reference to "providing nesting places for swifts and swallows or roosts for bats" in paragraph 3.10 is welcome but this is very vague at present about when, where and how these are to be provided.	The Council resolved to require best practice standards for inclusion of swift boxes in the New Bury Local Plan in July 2024 and ensure that any plans to re-roof the Councils Housing Stock is seen as an opportunity to install swift bricks.	Chapter 2 has been amended to incorporate the role that buildings play in the borough for nesting
The universal Swift brick houses several red listed small bird species and should be installed in all new developments in accordance with best practice guidance.	The Council resolved to require best practice standards for inclusion of swift boxes in the New Bury Local Plan in July 2024 and ensure that any plans to re-roof the Councils Housing Stock is seen as an opportunity to install swift bricks.	Chapter 2 has been amended to incorporate the role that buildings play in the borough for nesting
Encouraging more conservation groups and the participation of the residents would be valued	In table 1 of the strategy, an action to support local communities in acquiring and spreading understanding is proposed. Specific measures to deliver this action will be developed through the implementation of the strategy.	No change
Reference the RSPB Swift Mapper website (https://www.swiftmapper.org.uk/)	Noted	The end of the document now includes links to several helpful resources.
"1, Surveys need take account of migratory species , such as swifts, and be undertaken at the right time of year to capture such species. Buildings specifically need to be recognised as habitats "	Ecological surveys are undertaken in specific seasons. Chapter 2 has been amended to incorporate the role that buildings play in	Chapter 2 has been amended to incorporate the role that buildings play in the borough for nesting

	the borough for nesting.	
Seek support and help from organisations such as the RSPB. They do great work with farmers and other landowners.	Specific measures will be developed through the implementation of the strategy.	No change
Community projects such as 'fit a nest box' week, where householders are encouraged, maybe offered, a free nest box to fit to their houses.	Specific measures will be developed through the implementation of the strategy.	Chapter 2 has been amended to incorporate the role that buildings play in the borough for nesting
Make reference to microplastic and litter. This pollution has vast impacts on biodiversity of soil, plants, pollinators, and the health of all animals, including humans.	Specific measures will be developed through the implementation of the strategy.	No change
Priority Habitats, Priority Species, Biodiversity Opportunity Areas	A change has been made in Chapter 2 to refer to Priority habitats. Priority species are referred to in Chapter 2.	A change has been made in Chapter 2 to refer to Priority habitats. Priority species are referred to in Chapter 2.

2.14 When asked for any other comments, respondents provided the following:

Summary of comment	Response	Change required
Welcomes the consultation and acknowledgement that protecting and managing our green spaces better, increasing biodiversity and acknowledging that it is an important part of becoming carbon neutral. We are in a climate and environmental emergency.	Support noted	No change
I am glad to see the council taking action.	Support noted	No change

Swift bricks should be installed in all new developments.	The Council resolved to require best practice standards for inclusion of swift boxes in the New Bury Local Plan in July 2024 and ensure that any plans to re-roof the Councils Housing Stock is seen as an opportunity to install swift bricks.	Chapter 2 has been amended to incorporate the role that buildings play in the borough for nesting
A good step forward, but please utilise the experienced conservation groups to help.	Support noted	No change
I am impressed that it gives such a comprehensive overview.	Support noted	No change
Stop development of green land and PfE allocation JPA7 Elton Reservoir as this is where the biodiversity is.	The Places for Everyone Plan was found sound following an independent examination which considered all ecological evidence for the Elton Reservoir site. The Plan was subsequently adopted by full Council with effect from 21 March 2024.	No change
Waste of council tax money & Council ignore local people.	This consultation is to hear the views of local people. The strategy has been funded using a grant from DEFRA, not council tax.	No change
Annual Reports that quantify the diversity in the borough and losses/gains, then residents can see where they can help in turning around declining stories.	Specific measures will be developed through the implementation of the strategy.	No change
Should be part of the school curriculum and primary, secondary and tertiary level.	Specific measures will be developed through the implementation of the strategy.	No change

Overall I am very pleased to see the Borough recognising the value and need for a Biodiversity Strategy, However, it is the detail of the actions and who and when they will be done along with a commitment to funding that will in the end make any major changes.	Support noted. Specific measures will be developed through the implementation of the strategy.	No change
More public education is needed to leave these plants where they are to prevent biodiversity decline. That a little bit of scruffiness is great for nature. Adopting Plantlife's No Mow May and publicising it would be fantastic.	In table 1 of the strategy, an action to support local communities in acquiring and spreading understanding is proposed. Specific measures to deliver this action will be developed through the implementation of the strategy.	No change
There is also a mental health impact on people, who will end up in a vicious cycle of being depressed/anxious due to being surrounded by pollution, and losing their willingness to engage with any initiatives to improve that scenario; people stop caring and it becomes harder and harder for the authorities to rein in negative attitudes and promote such strategies, especially when they are struggling with their own health and finances.	The foreword makes reference to the importance of the natural environment for mental health.	No change
Waste of time.	This is the Council's first ever Biodiversity Strategy and is the first step toward implementing our Biodiversity Objectives and Actions.	No change

3. Schedule of amendments to draft strategy

- 3.1. Please refer to the table below which details the amendments to the Biodiversity Strategy.
- 3.2. Proposed new text is shown as blue underlined text whilst deletions are shown as struck out.

Location	Change
cover	Use a single image, perhaps of the woodpeckers, instead of 6 small ones
1.8	<p>Amend paragraph 1.8 as follows:</p> <p>The Greater Manchester Five-Year Environment Plan (2019-2024)⁴ identifies 5 priorities for the natural environment: Managing land sustainably, managing our water sustainably, achieving a net gain in biodiversity from new development, increasing investment in our natural environment and increasing our engagement with our natural environment. <u>The Greater Manchester Combined Authority is charged with producing a Local Nature Recovery Strategy for the city region and a draft is expected in Autumn 2024. The GMCA</u> Greater Manchester Combined Authority has also produced Biodiversity Net Gain Guidance for Greater Manchester⁵ and published an Off-site Net Gain Scoping Study in 2021.</p>
Map on Page 7	Updated Map to GM Landscape Character Types
After 2.10	Add numbering to paragraph and update subsequent numbers
2.11	<p>Amend text as follows:</p> <p>The biodiversity interest of the Borough is recognised in various site designations which receive some protection from policies in the Unitary Development Plan. Bury has:</p> <ul style="list-style-type: none"> • 2 Sites of Special Scientific Interest • 49 Sites of Biological Importance • 13 ancient woodlands • 7 local nature reserves • <u>6-A number of</u> protected species <u>such as</u> (badger, otter, barn owl, kingfisher, great crested newt, black necked grebe) plus several bat species and winter visitors. • c112 km of wildlife links and corridors
Following new 2.11	<p>Add paragraph 2.12 as follows:</p> <p><u>2.11</u> In the animal world the arrival of Canada geese, grey squirrel, mink and signal crayfish have affected indigenous communities. Then there are diseases to contend with, such as ash die-back, chestnut canker and acute oak decline.</p>

	2.12 Buildings also play a role in providing habitats and maintaining biodiversity in the borough. Several species such as bats, swifts, swallows, house martins and starlings use buildings for nesting.
After 2.18	Add new Paragraph as follows: 2.19 Natural England also keeps a record of Priority Habitats across the region. The maps are updated bi-annually so to see the current habitats' in Bury, please visit the Priority Habitat Inventory on data.gov.uk.
3.6	Amend draft paragraph 3.6 as follows: 3.6 Although most people are well disposed towards the natural environment, people aren't always aware of the biodiversity that exists, how it functions and how it can be harmed. Some will welcome the opportunity or encouragement to get actively involved in improving biodiversity through initiatives such as 'No Mow May', installing nesting boxes in their gardens or creating hedgehog highways
After 3.10	Add paragraph as follows: In July 2024, the Council resolved to require best practice standards for inclusion of swift boxes in the new Bury Local Plan and ensure that any plans to re-roof the Council's housing stock is seen as an opportunity to install swift bricks.
3.11	Amend draft paragraph 3.11 as follows: 3.11 The 2021 Environment Act places a a new duty on Local Planning Authorities to require a 10% increase in biodiversity value from new development requiring planning permission.
3.12	Delete paragraph 3.12 as follows: 3.12 The Draft Places for Everyone Plan includes a policy requiring Biodiversity Net Gain.
3.13	Amend draft paragraph 3.13 as follows: 3.13 Biodiversity Net Gain is due to become became mandatory in two steps on 12 February and 2 April 2024 January 2024 and we, with partners such as Bury Council and the Greater Manchester Ecology Unit, will begin monitoring and reporting on what is done to achieve biodiversity net gain, be it on or off development sites. The first report will be published before 2026.
3.15	Amend draft paragraph 3.15 as follows: The Council has commissioned the Greater Manchester

	Environment Trust (GMET) to prepare costed habitat improvement and management plans for seven of these Council-owned potential BNG sites: at Old Kays, Brandlesholme, Chesham Woods, Hollins, Springwater Park, Outwood and Philips Park. The GMET is a partnership between the Greater Manchester Combined Authority and the Wildlife Trust for Lancs, Greater Manchester and North Merseyside, which exists to bring together public, private and third sector bodies, communities and funders to address environmental issues.
4.2	<p>Amend draft paragraph 4.2 as follows:</p> <p>Delivering these objectives will require policies and actions. We propose to carry through the policies for biodiversity contained in the Unitary Development Plan (see Appendix for detail) and update them for inclusion in the forthcoming Local Plan. Strategic policies are included in the Places for Everyone Strategy. Local Plan policies will build on the GM policies and those in the previous Unitary Development Plan, which are listed in the Appendix.</p>
<i>Table 2</i> Implement mandatory BNG.	Change target date as follows: January April 2024.
<i>Table 2</i> Adoption of Places for Everyone.	Change target date as follows: 2023-2024.
<i>Table 2</i> Implement updated planning policies through the development management process.	<p>Add measure: Use of Places for Everyone policies in planning decisions.</p> <p>Change target date as follows: 2024-2026</p>
<i>Table 2</i> Establish monitoring system for delivery of net gain agreements on offset sites in Bury defined	<p>Amend Action as follows:</p> <p>Establish monitoring system for delivery of net gain agreements on offset sites in Bury defined off-site biodiversity gain.</p> <p>Amend measure as follows: Monitoring framework established for Biodiversity Net Gain sites</p>
<i>Table 3</i> Deliver BNG	Insert Lead: Bury Council/GMET/GMEU

on Council-owned sites.	
<i>Table 3</i> Support naturalisation of watercourses	Amend Lead as follows: Landowners/Bury Council/ Irwell Catchment Partnership .
<i>Table 3 insert additional action</i>	Insert new Action as follows: The Council will expect relevant proposed developments to incorporate nesting or roosting opportunities for birds and bats. Lead: GMEU/Bury Council Measure: Number of developments with bat or bird boxes. Target date: From 2024
5.1	Un-bold text
5.2 (and sentence on p16)	Change start of paragraph to 'Following the mandatory introduction of biodiversity net gain in 2024 and the adoption' Amend draft paragraph 5.2 as follows: 5.2 Following the mandatory introduction of biodiversity net gain in November 2023 2024 and the adoption of Bury Biodiversity Strategy, we will also produce, no later than 1 January 2026, a report on how the Council is meeting its biodiversity duty. This report will be updated at least every 5 years. Remove blue text at bottom of page 16.
6.4	Amend paragraph 6.4 as follows: The second major element of the Environment Act is Biodiversity Net Gain. From January 2024 a All qualifying development requiring permission now has to achieve a minimum of 10% net gain in biodiversity. This requirement will be became applicable to all major developments developments except small sites in January 2024 in February 2024 and small sites in April 2024 .
6.5	Amend paragraph as follows: 6.5 This will provides a legal requirement that any impact on biodiversity caused by development initiatives, where it cannot be avoided, will not only be compensated but will have to demonstrate a 10% biodiversity net gain.
6.8	Amend paragraph as follows: 6.8 Once adopted, the Greater Manchester 'Places for Everyone' Joint DPD will was adopted in March 2024 and forms an integral part of Bury's wider development plan. The Plan is will

	<p>be a key tool in meeting Greater Manchester's ambition to become carbon neutral by 2038 and will work in tandem with the Five-Year Environment Plan 2019-2024 produced by the Greater Manchester Combined Authority (GMCA).</p>
6.9	<p>Amend paragraph 6.9 as follows:</p> <p>6.9 The Places for Everyone (PfE) joint development plan document has an overall aim of achieving a major net enhancement of biodiversity value across the region. Greater Manchester. In order to achieve this each new development will deliver a "net gain in biodiversity".</p>
6.10	<p>Amend paragraph 6.10 as follows:</p> <p>6.10 Draft Policy JP-G8 JP-G9, as proposed to be modified in October 2023, states the following:</p>
Page 20 Policy JP-G9 extract	<p>Amend as follows:</p> <p>Policy JP-G9 JP-G8 A Net Enhancement of Biodiversity and Geodiversity Through local planning and associated activities a net enhancement of biodiversity resources will be sought, including, where relevant, by:</p> <ol style="list-style-type: none"> 1. Increasing the quality, quantity, extent and diversity of habitats, particularly priority habitats identified in national or local biodiversity action plans and those that support priority species; 2. Improving connections between habitats, to protect and enhance the provision of corridors, ecological networks (including Nature Recovery Networks) and stepping stones that enable the movement of species, especially as the climate changes; 3. Enhancing the management of existing habitats, including through habitat restoration, avoiding habitat fragmentation and combating invasive species; 4. Protecting sites designated for their nature conservation and/or geological importance, with the highest level of protection given to international and then national designations; 5. Facilitating greater access to nature, particularly within urban areas; 6. Supporting the development and implementation of the Great Manchester Wetlands Nature Recovery Network; and 7. Safeguarding, restoring and sustainably managing our most valuable soil resources, tackling soil degradation/erosion and recovering soil fertility, particularly to ensure protection of peat-based soils and safeguard 'best and most versatile' agricultural land. <p>Development will be expected to:</p> <ol style="list-style-type: none"> a) Follow the mitigation hierarchy of: <ol style="list-style-type: none"> i. Avoiding significant harm to biodiversity, particularly where it is irreplaceable, through consideration of alternative sites with less harmful impacts, then ii. Adequately mitigating any harm to biodiversity, then

	<p>iii. Adequately compensating for any remaining harm to biodiversity</p> <p>b) Avoid fragmenting or severing connectivity between habitats;</p> <p>c) Achieve a measurable net gain in biodiversity of no less than 10%</p> <p>d) Make appropriate provision for long-term management of habitats and geological features connected to the development;</p> <p>e) <u>Where appropriate, development should: mitigate air pollution impacts on Manchester Mosses SAC; mitigate urban edge, functionally linked land and recreation disturbance impacts on the South Pennine Moors SAC/SPAs; and assess and potentially mitigate boat movement, water pollution, and light spillage and shading impacts on the Rochdale Canal SAC; and</u></p> <p>f) Development proposals should be informed by the findings and recommendations of the appropriate biodiversity/ecological assessment(s) in the PfE evidence base and/or any updated or appropriate biodiversity/ecological assessments submitted as part of the planning application process.</p>
6.16	<p>Amend paragraph as follows:</p> <p>Over the coming months, we will be involved in the early stages of the LNRS' production, which will include evidence gathering, stakeholder engagement, and workshops to agree core nature recovery areas, opportunity areas, and mapping methods. It is expected that a draft LNRS for Greater Manchester will be published for public consultation in Summer <u>Autumn</u> 2024.</p>
6.20	<p>Amend paragraph as follows:</p> <p>6.20 Whereas PfE will deals <u>deals</u> with strategic planning matters that are of significance across the Joint Plan area (such as identifying future levels of housing and employment growth), Bury's Local Plan will contain a range of locally-specific planning policies and identify local sites where development should be built as well as areas where development should be restricted or controlled.</p>
Above 6.24	<p>The heading 'Bury Climate Action Strategy and Plan' should be in the same font as Bury Development Plan.</p>
6.25	<p>Amend as follows:</p> <p>6.25 The action plan (2024<u>2024</u>)¹⁴ sets out actions for the natural environment that the council can participate and lead on including but not limited to:</p>
End of document	<p>Add text as follows:</p> <p><u>Inspired to take action?</u></p>

	<p><u>For more information, why not visit the links below to find out how you can help biodiversity.</u></p> <ul style="list-style-type: none">• <u>Your garden, balcony or yard, no matter how big or small, has the potential to be a haven for wildlife. Visit Lancashire Wildlife Trust's website for some tips on how to get started: https://www.lancswt.org.uk/my-wild-garden</u>• <u>Every action counts. GM Green City have a wide range of resources to help: https://gmgreencity.com/interests/natural-environment/</u>• <u>Want to encourage more birds in your area? RSPB have lots of handy tips for supporting wildlife on their website: https://www.rspb.org.uk/helping-nature/what-we-do</u>
--	---

This page is intentionally left blank

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	Bury Biodiversity Strategy
Lead Officer (SRO or Assistant Director/Director)	Crispian Logue
Department/Team	Strategic Planning and Infrastructure, Department of Business Growth and Infrastructure
Proposed Implementation Date	25 th September 2024
Author of the EqIA	Sophie Bleasdale
Date of the EqIA	27/08/2024

1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?
<p>The government requires public bodies to meet their duty to conserve and enhance biodiversity. This means that, as a public authority, Bury Council must:</p> <ul style="list-style-type: none"> Consider what we can do to conserve and enhance biodiversity; Agree objectives and policies based on consideration of the duty; and Act to deliver our policies and achieve our objectives. <p>The first draft of the Strategy was approved for consultation in early 2024 and it is now proposed that the Council adopts the final Biodiversity Strategy. The purpose of the strategy is to outline the current state of biodiversity in Bury and the potential actions that we could take to conserve and enhance it. The strategy will clarify to the Council, the community and its partners, the priorities for Bury and how we can deliver them.</p> <p>Given the interrelationships involved, the Biodiversity Strategy needs to be a corporate document as well as engaging the wider community. Without action, pressure from urban development, intensive land management practices, human disturbance, introduced diseases, invasive non-native species and climate change can be expected to further exacerbate the decline of the UK's biodiversity over the coming decades.</p>

<p>2.1 Who could the proposed policy/project/decision likely have an impact on?</p> <p>Employees: Yes/No (state reasons for answering 'no')</p> <p>Community/Residents: Yes/No (state reasons for answering 'no')</p> <p>Third parties such as suppliers, providers and voluntary organisations: Yes/No (state reasons for answering 'no')</p> <p>If the answer to all three questions is 'no' there is no need to continue with this analysis.</p>
<p>2.2 Evidence to support the analysis. Include documentary evidence, data and stakeholder information/consultation</p> <p>Documentary Evidence: Appendix A – Biodiversity Strategy</p> <p>Data: n/a</p> <p>Stakeholder information/consultation: Appendix B– Consultation Summary Report including Schedule of Changes.</p>
<p>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.</p>

- 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	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3		n/a	Neutral
Disability	Outcomes of this Biodiversity Strategy are not against any particular characteristics and		n/a	Neutral

	all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3			
Gender Reassignment	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3		n/a	Neutral
Marriage and Civil Partnership	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3		n/a	Neutral
Pregnancy and Maternity	Outcomes of this Biodiversity Strategy are not against any		n/a	Neutral

	particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3			
Race	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3		n/a	Neutral
Religion and Belief	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3		n/a	Neutral

Sex	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3		n/a	Neutral
Sexual Orientation	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3		n/a	Neutral
Carers	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes		n/a	Neutral

	set out in section 2.3			
Looked After Children and Care Leavers	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3		n/a	Neutral
Socio-economically vulnerable	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be unaffected or benefit from the outcomes set out in section 2.3		n/a	Neutral
Veterans	Outcomes of this Biodiversity Strategy are not against any particular characteristics and all characteristics are expected to be		n/a	Neutral

	unaffected or benefit from the outcomes set out in section 2.3			
--	--	--	--	--

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

2.5 Characteristics	Action	Action Owner	Completion Date
No current action required 02/09/24			

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
------------	-------------	------------------	---------------------	--------------------

3.2 Level of risk identified	0
3.3 Reasons for risk level calculation	Outcomes of this Biodiversity Strategy are expected to impact risk to people or organisations. The Public and organisations are expected to benefit from the adoption of the strategy.

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 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			
Responsible Asst. Director/Director			
EDI			

EqIA Revision Log

5.2 Revision Date	Revision By	Revision Details



Classification: Open	Decision Type: Key
--------------------------------	------------------------------

Report to:	Cabinet	Date: 25 September 2024
Subject:	Northern Gateway (Governance / Investment Zone) - PART A	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1. To provide an update on Atom Valley / Northern Gateway.
2. To introduce the Greater Manchester Investment Zone (IZ) programme.
3. To seek Cabinet approval of the recommendations as identified in this report.

Recommendation(s)

4. It is recommended that Cabinet:
 - i. Endorses the development of formal of joint working arrangements with Rochdale Council to progress work on Atom Valley and Northern Gateway.
 - ii. Approve Northern Gateway as part of Greater Manchester's Investment Zone.
 - iii. Note in principle the award of Investment Zone funding from the Investment Zone Flexible Spend fund for the purposes of delivery of the Western Access highway project.
 - iv. Approve the procurement of a consultant to appoint and lead a multi-disciplinary team to advance the Northern Gateway site to a maximum sum of £600,000 to be funded from the IZ funding and in accordance with the Council's Contract Procedure Rules.
 - v. Delegates authority to the Monitoring Officer to finalise and execute any associated agreements.
 - vi. Endorses the Western Access Procurement Strategy at Appendix F and delegates authority to the Executive Director (Place – Business, Growth and Infrastructure) to make adjustments to it as the Northern Gateway project progresses.
 - vii. Endorses the interim governance arrangements for Northern Gateway, including approval of Northern Gateway's:
 - a. Governance Framework,
 - b. Business Plan as appended to Part B of this report and

- c. Procurement Strategy.
- viii. Authorises officers to explore potential delivery options for Northern Gateway, including exploration of Mayoral Development Corporation (MDC). Further reports will be brought to Cabinet with recommendations following conclusion of this workstream.
- ix. Notes the Rochdale Borough Council's intention to take a similar report to their Executive.

Reasons for recommendation(s)

- 5. Significant progress is now being made to bring forward Northern Gateway allocations JPA1.1 and JPA1.2, which form part of the Atom Valley Mayoral Development Zone (MDZ). This includes the recent adoption of Places for Everyone (PfE) Joint Development Plan in March 2024 and the designation of Northern Gateway as part of the Greater Manchester IZ.
- 6. The designation of the Greater Manchester IZ attracts significant funding alongside other financial incentives including the retention of business rates.
- 7. As result of these policy interventions and funding opportunities, there is a need for more structured and formalised working, resourcing and governance arrangements with Rochdale Council and GMCA to realise the opportunities, confirm the structure to move effectively into the delivery phase and ensure adherence to forthcoming government criteria relating to any funding.
- 8. Following the adoption of PfE in March 2024 and the on-going work on the Northern Gateway Development Framework (due to come to Cabinet later in the year), priority areas of work have been identified going forward, which are included in this report, informing the recommendation herein.
- 9. The IZ funding has been allocated from 1st April 2024, with a year-one spend deadline of 31st March 2025, along with other revenue funding, there is a need to move projects forward swiftly and flexibly to respond to these funding opportunities. As such, the report seeks delegations to the Executive Director (Place - Business Growth and Infrastructure), Leader of the Council and relevant Portfolio holder(s) to facilitate these processes and implement the respective Delivery and Procurement Strategies.

Alternative options considered and rejected

- 10. That the recommendations are not approved, and we do not utilise the funding, with this reallocated elsewhere in Greater Manchester. This presents a risk to delivery of the Places for Everyone joint development plan and specifically, the delivery of Northern Gateway.
- 11. That the collaboration and delegations are not approved, and further reports are brought to Cabinet to authorise spending in relation to funding at a later date. This introduces risk that monies will not be deployed or spent on time both within

this financial year 2024/25 and future years, with funding reallocated to other projects elsewhere in Greater Manchester.

12. That procurements are dealt with in a piecemeal manner. This would mean lack of consistency of the project team, presenting a risk of abortive work and associated implications in terms of increased cost and time. This approach would also introduce increased risk of not being able to secure a Tier 1 contractor to construct the highway improvements.

Report Author and Contact Details:

Name: Hollie Good

Position: Major Project Manager (Northern Gateway)

Department: Business, Growth and Infrastructure

E-mail: h.good@bury.gov.uk

BackgroundAtom Valley Mayoral Development Zone

13. Atom Valley MDZ was designated in 2022 and spans the local authority areas of Rochdale, Bury and Oldham. It aims to deliver a nationally significant area of economic activity along the M62 corridor from junction 18 (Simister Island) to junction 21 (Milnrow) through parts of Bury, Rochdale and Oldham and supported by a significant increase in new homes.
14. The MDZ is the single largest economic opportunity within Greater Manchester. It provides a critical opportunity for inclusive growth to rebalance and enhance productivity within the Greater Manchester city-region, contributing to national economic growth and Levelling Up.
15. One of the key purposes of the MDZ is to develop an international mega-cluster of advanced manufacturing research, innovation, manufacturing and logistics activity, with the potential to deliver 1.3 million square metres (sqm) of additional employment space with 3,400 new homes by 2040, in addition to existing consented developments.
16. The focus of the MDZ is on three strategic growth sites now allocated for development the PfE joint development plan adopted in March 2024. These sites are:
- Northern Gateway (within Rochdale and Bury);
 - Stakehill (within Rochdale and Oldham); and
 - Kingsway (Rochdale).
17. Of the three growth sites above, Northern Gateway is the largest and includes two sites: Heywood/Pilsworth (allocation JPA 1.1 of PfE) and Simister/Bowlee (JPA 1.2). Heywood/Pilsworth allocation JPA1.1 includes the South Heywood consented mixed use development at M62 J19 and the link road, Queen Elizabeth Way located within

the Borough of Rochdale. Two residential phases of the consented development are under construction and a third is due to commence shortly.

18. To identify and explore the potential opportunity of the MDZ, a Strategic Outline Business Case was commissioned to identify the potential benefits.
19. The table below shows the economic potential across the MDZ and specifically, Northern Gateway:

Benefit	Atom Valley	Northern Gateway
Commercial floorspace	1.3 million sqm	1.06 million sqm
New gross direct FTE jobs	23,900	18,900
Gross direct GVA per annum	£1.7 billion	£1.3 billion
Net additional GVA	£1.3 billion	£1 billion
Annual business rates income	£40 million	£32.5 million
Annual council tax receipts	£7.6 million	£3.8 million

*Figures based on an indicative split between Advanced Manufacturing, which is the focus of the IZ, and other sectors - subject to market demand therefore may vary

20. Northern Gateway, which is the largest employment allocation within PfE, and will be a key driver in delivering growth ambitions, to make Bury stand out as a place that is achieving faster economic growth than the national average, with lower than average levels of deprivation.
21. The wider benefits and outcomes of the MDZ include:
 - Innovation and enterprise
 - Wage uplifts
 - Health and wellbeing
 - Attracting inward investment
 - Skills and training
 - Clustering and agglomeration related productivity
 - Reducing socio-economic disparities and inequalities
 - Placemaking and wider area impacts
 - Low/net zero carbon benefits
 - Systems benefits from addressing health and worklessness.
22. The Northern Gateway site straddles the Districts of Bury and Rochdale and the project should be designed without the constraints of the district boundaries. Working collaboratively with Rochdale Council and GMCA will ensure that the site is not built out in a fragmented way and the economic opportunities and attraction of the site for investment can be maximised.
23. An Atom Valley Business Plan containing a three-year Action Plan and annual programme of priorities for each site within Atom Valley is being developed. A separate Northern Gateway Business Plan has also been developed to guide activity over the next period whilst delivery mechanisms are being explored (attached in Appendix B – Part B).

Greater Manchester Investment Zone

24. The refocused Investment Zones programme was launched by Government at Spring Budget 2023 and provides IZ areas with a £160 million envelope over 10 years to catalyse local growth and investment. These interventions will include new research and innovation, sector-focussed skills programmes, local infrastructure enhancements, and targeted business support.
25. The IZ for Greater Manchester is now one of six confirmed Investment Zones to date in England. Government set out details of how Investment Zones will use the funding envelope available, which includes offering tax reliefs to attract businesses to these Zones, and initial investments in a range of interventions including on skills, research and innovation, and infrastructure.
26. The Greater Manchester IZ will drive growth and innovation in the advanced manufacturing and materials sector. Funding will be used to accelerate Atom Valley, the Innovation District Manchester and Salford Crescent with support for research and innovation to grow the knowledge economy and infrastructure funding to unlock laboratory and manufacturing space.
27. Additional funding will be provided for opportunities across the city region to strengthen the wider innovation ecosystem, including a multi-million-pound revolving investment fund to provide debt and equity finance to local advanced manufacturing and materials businesses across the whole of Greater Manchester, and £5 million to support skills development.
28. It is anticipated that the Great Manchester IZ will create 32,000 jobs and leverage £1.1 billion investment over the next 10 years.
29. Following discussions with Leaders, Chief Executives and GMCA, and in consultation with Government, Greater Manchester identified two geographical areas totalling 600 hectares to be allocated within the IZ to receive enhanced status through new business rates initiatives, with a 25-year business rate retention scheme without a reset.
30. The two proposed Investment Zone Enhanced Business Rates Areas are:
 - i. **Northern Gateway:** Boundary covers sites in Bury and Rochdale, total hectares: 388.27ha.
 - ii. **Manchester “Smile”:** Boundary covers sites in Manchester and Salford, total hectares: 209ha. It includes Mayfield, ID Manchester and Salford University.
31. An initial allocation of £80 million of IZ Flexible Spend, which includes revenue and capital, to be spent over five years from 2024/25 has been determined, based on a spend profile set out for each year. Beyond the first five years, the spend profile is subject to a forthcoming timetable to be set by Government.
32. Northern Gateway has been allocated £10m over a 5-year period from 2024/25 to advance the delivery of the Western Access project - a local highway scheme spanning the Districts of Bury and Rochdale, which will create additional capacity

and improved flow on the local and strategic highway and see the introduction of active travel and public transport measures. The Western Access project has a critical interface with M66 J3 and work is ongoing with National Highways in respect of this.

33. Bury Council is the accountable body for the IZ funding for both Bury and Rochdale, and will procure and deliver and required works and services on behalf of both Bury and Rochdale Councils.
34. Following approval by Cabinet, the IZ funding will be awarded. Any appointments required to facilitate the project are subject to the award of funding. Allocation of future years spend profile will be agreed with GMCA as the project progresses. Due to the terms of the IZ funding, monies will be spent up front and subsequently drawn down from GMCA.
35. Future work will build upon recent completion of advance early surveys, optioneering, Strategic Outline Business Case and preliminary designs for the Western Access.
36. Procurement Strategy recommendations detailing the general approach to delivering the Western Access are presented for endorsement. It is recommended that the scheme is developed up to and including Outline Business Case (OBC) / planning design stage (aligned to RIBA Stage 3 – spatial coordination and planning design) and Full Business Case (FBC) / detailed design stage (aligned to RIBA Stage 4 – technical design), the scope of which is to be confirmed during conclusion of the OBC stage. The OBC stage will shortly be initiated and progressed. Subject to further technical work being undertaken during OBC stage, it is currently anticipated that the Western Access scheme will be constructed as one single package of works, rather than in phases, with early contractor involvement at design stage providing further advice in this respect and reducing construction risk.
37. The detailed Procurement Strategy setting out recommendations of the most appropriate route to procurement is also presented for endorsement. It is recommended that an external appointment is made for a multi-disciplinary consultant team to lead the development of an Outline Business Case and associated feasibility and planning designs in addition to managing risk, land acquisition and Planning, with a contractor appointed separately to reduce risk and increase certainty of cost and deliverability. Appointments will also be made to progress an associated Funding Strategy that will need to be linked to infrastructure delivery and proposals for an emerging developer clawback mechanism and necessary legal orders. It is envisaged that the Procurement Strategy may be subject to modest adjustments as the project progresses and circumstances naturally evolve.
38. The development of a Funding Strategy will seek to address the funding gap between the high-level estimates of the Western Access and the award of the Investment Zone monies. Amongst others, this is likely to include developing mechanisms for securing developer contributions, as well as any wider local and national funding opportunities.

Northern Gateway

39. The Council has worked closely with Rochdale Council for a number of years to get the site allocated through the Places for Everyone plan. In March 2020, Rochdale Council granted planning permission for the first phase of development at Northern Gateway, a £400m mixed-use scheme at South Heywood, which included the Queen Elizabeth Way link road to J19, 1.8m. sq.ft of industrial and warehousing floorspace and 1,000 new homes.
40. Going forward, the recent policy interventions and funding opportunities necessitate more structured and formalised working, resourcing and governance arrangements with Rochdale Council and GMCA to realise the opportunities and to reflect the sites status as an IZ.
41. A Northern Gateway Business Plan has been developed to set out priority activities and key workstreams for the forthcoming 12 months.
42. The Business Plan provides detail of how these priorities will be delivered through presentation of a Project Plan, and a pipeline then develops this detail further by setting out funding requirements. A process of monitoring will be put in place to ensure activities remain on plan or are escalated within the agreed Governance Framework as necessary.
43. In order to identify key priorities and actions, a critical path analysis has been carried out, to be taken forward by the councils in collaboration with public sector partners and developers/landowners to progress delivery of Northern Gateway identifying the following key workstreams:

42.1 Vision:

- 42.1.1 A strategic development vision for Northern Gateway has been developed by the partners and endorsed by the Atom Valley MDZ Board.

42.2 Governance:

- 42.2.1 In July 2024 GMCA Executive agreed to the In Principle establishment of a Northern Gateway MDC. A project plan, which will be taken forward subject to Cabinet endorsement, has been developed to explore various mechanisms and delivery options, including the potential to pool resources and expertise across the various public sector partners.
- 42.2.2 To demonstrate a commitment from the parties to shared objectives and pooling of resources going forward, it is requested Cabinet endorses the development of formal joint working arrangements with Rochdale Council to progress work on Atom Valley and Northern Gateway.
- 42.2.3 Until such time as a delivery mechanism is established, and in recognition of the need to progress project delivery, interim governance arrangements have been developed to establish a Governance Framework which includes a clear reporting and decision-making structure, delegations for approval of workstreams and spend, Terms of Reference and a Northern Gateway Procurement Strategy.
- 42.2.4 To support effective, managed delivery a Project Management Office (PMO) is being established and will initially be coordinated within Bury Council. Resources are to be

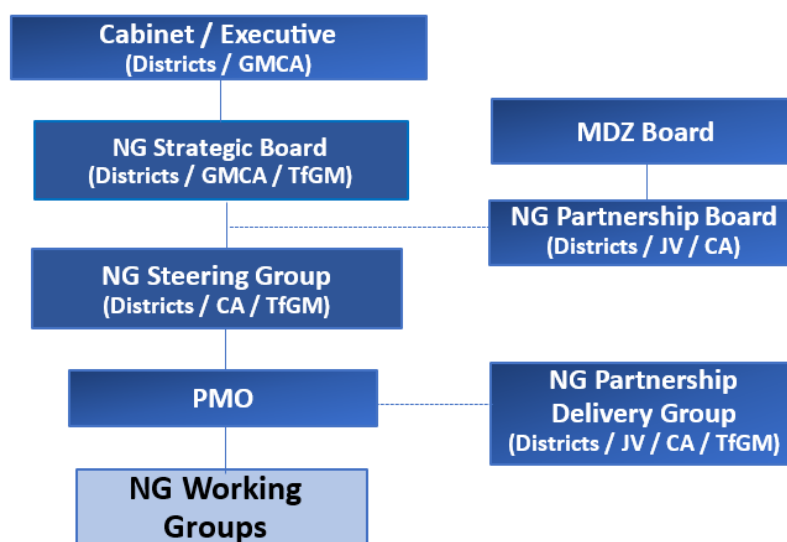
identified from Bury and Rochdale Councils, GMCA and TfGM to work with PMO to deliver all workstreams associated with Northern Gateway. It is likely that the PMO structure will be moved into the MDC, should one be established, and governance arrangements will be reviewed.

42.2.5 The following interim governance arrangements have been included for endorsement by Cabinet:

- a. Northern Gateway Governance Framework,
- b. Northern Gateway Business Plan as appended to Part B of this report and
- c. Northern Gateway Procurement Strategy.

42.2.6 The Northern Gateway project is overseen by a Strategic Board, which is a sub-group of district Cabinets and GMCA Executive. The Strategic Board, which is chaired by the Chief Executive of Bury Council, sets the strategic direction for Northern Gateway, providing key decisions to enable the project to progress, resolving obstacles to its delivery and working to mitigate risk. Strategic Board is led by officers from Districts and GMCA and its decision-making process is through Districts. Updates and decisions required relating to the Project Plan and Pipeline will be directed through Strategic Board, with coordination from the Northern Gateway Project Management Office (PMO).

42.2.7 The Atom Valley MDZ Board oversees the alignment and agreement of long-term aspirations and strategy for the sites within the MDZ, whilst developing and maintaining strategic relationships with key external stakeholders. In addition, it provides a centralised and consistent forum for the resolution of high-level issues for delivery of projects within the MDZ:



42.3 Comprehensive masterplans and wider planning strategy:

42.3.1 Allocation within PfE requires planning applications to accord with an agreed masterplan. Bury and Rochdale Council teams are currently working in partnership to develop a draft Supplementary Planning Document (SPD) which will be presented

to Cabinet / Full Council in due course. The SPD will be developed alongside an Infrastructure Phasing and Delivery Plan.

42.4 Infrastructure investment, funding and delivery strategy:

- 42.4.1** This will include strategic and local highway interventions, active travel and public transport, to link the sites to the surrounding motorways and town centres and create access to employment for local residents.
- 42.4.2** Work is already underway on a number of the above, with TfGM and National Highways engaged. The councils are working closely with TfGM to identify modelling requirements, sustainable transport solutions and active travel routes to support Northern Gateway.
- 42.4.3** Priority active travel corridors have been identified and the next step will be to develop outline designs for these corridors with accompanying cost estimates to aid the development of a Funding and Delivery Strategy.
- 42.4.4** Draft, high-level bus costs have been developed by TfGM and a prioritisation exercise, which includes developing understanding of trip demand patterns as well as considering future scenario planning, is now needed to determine which routes / services will be agreed for the baseline packages for bus.
- 42.4.5** National Highways have commenced a project to identify infrastructure improvements on the Strategic Road Network (SRN) in relation to Heywood / Pilsworth. Interventions on the M66 and M62 are critical to realising the full scale and potential of this site.
- 42.4.6** As detailed in Sections 30 – 38, funding has been secured to continue work on developing local highway interventions that will be required to deliver the Western Access project. Western Access, coupled with improvements at M66 J3, will provide additional capacity, movement and sustainable travel infrastructure to support delivery of Northern Gateway and enable infrastructure into the wider site.
- 42.4.7** Funding has also been secured to undertake optioneering and develop preliminary designs for the A576 / M60 J19 project, which will support the development of JPA1.2 through responding to constraints on the network and identifying active travel and sustainable modes provision. Working closely with Northern Gateway PMO, Bury, Rochdale and Manchester Councils, and National Highways, TfGM will lead this project.
- 42.5 Advanced manufacturing and materials:**
- 42.5.1** Further work to understand public sector approach to preparing sites to attract existing and new Advanced Manufacturing and Materials businesses to relocate, consolidate and expand.
- 43** To realise the funding opportunities and adhere to government spend requirements and IZ Flexible Spend profiles, resourcing will be required as dealt with within the proposed interim governance arrangements. Further reports will be presented to Cabinet in respect of resourcing and governance of any future delivery mechanism in due course.

Links with the Corporate Priorities:

Please summarise how this links to the Let's Do It Strategy.

- 44** A key part of the Places for Everyone Plan is to rebalance the Greater Manchester economy by significantly boosting the economic output from the north through the delivery of new housing and employment that will benefit both Bury and its residents. The plan sets out strategic site allocations that will guide future growth and development in the Borough. The 'Let's Do It' strategy specifically refers to Places for Everyone as having a key role to play in the delivery of its objectives and priorities, in addition to the Corporate Plan 2024/25 seeks to deliver the Vision for 2030 which is for the Council to Achieve Economic Growth.
- 45** As Bury's largest employment allocation within the Places for Everyone plan, Northern Gateway supports delivery of the Vision 2030 and '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:

Local – The project will generate jobs for local people, enhance economic regeneration and provide links with existing and new communities.

Enterprise - the project will drive economic growth and inclusion by creating more employment space for existing businesses to expand into and to encourage more local, national and international businesses to open in the Borough; helping to ensure residents have the best chance to access good jobs.

Together – Ensuring sustainable access into the site to maximise inclusivity and access to opportunities for members of the local community and working with partners to maximise social value opportunities to shape outcomes.

Strength - the project will provide space for new and expanding local business within a site that is well connected to local communities. This will provide opportunities for community wealth building through new business start-ups, increased local spend and the adoption of new skills whilst providing opportunity for all through provision of sustainable transport modes.

Equality Impact and Considerations:

*Please provide an explanation of the outcome(s) of an initial or full EIA and make **specific reference regarding the protected characteristic of Looked After Children**. Intranet link to EIA documents is [here](#).*

- 46** The attached Equality Impact Assessment concludes that impacts are positive and will continue to be assessed as the project progresses.

Environmental Impact and Considerations:

*Please provide an explanation of the carbon impact of this decision. Please include the impact on both **Carbon emissions** (contact climate@bury.gov.uk for advice) and **Biodiversity** (contact c.m.wilkinson@bury.gov.uk for advice)*

- 47** Environmental impacts and concerns will be assessed and monitored as project delivery commences and will be in-line with existing Council policies. The Northern Gateway Development Framework will seek to meet policy requirements, including physical, social and environmental impacts including biodiversity net gain.
-

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Inability to deliver IZ funding due to reduced timescales	<ul style="list-style-type: none"> • Cabinet endorsement of interim governance arrangements for Northern Gateway • Delegated authority to the Executive Director (Place - Business Growth and Infrastructure) in consultation with the Leader of the Council and Cabinet Portfolio Holder, to authorise expenditure in relation to any funding and authorise associated contractual arrangements, agreements and documents, including receipt of grant funding. • Increased delivery resources • Necessary Legal and Procurement support

Legal Implications:

The Department for Levelling Up, Housing and Communities (DLUHC) has entered into a Memorandum of Understanding (MoU) with GMCA dated 27 March 2024. The MoU sets out the terms upon which funding is allocated to the Investment Zone on an annual basis. The MoU is non-binding as between DLUHC and the GMCA and the GMCA is responsible for spending the funds and delivering the agreed outputs. DLUHC will release funding each year subject to the GMCA satisfying the monitoring and other requirements for the IZ programme.

It is intended that part of the Investment Zone funding awarded to the GMCA under the MoU will in turn be awarded to the Council following the Council's decision to approve the Northern Gateway project. It is anticipated that the funding conditions will require the Council to assume responsibility for delivering certain of the agreed outputs and to commit and/or spend the funds within certain timeframes. The award of contracts in relation to this project (including the appointment of the consultant mentioned in the recommendations above) are dependent upon the availability of this funding and therefore contracts should not be finalised before the terms of the funding agreement have been approved and the agreement completed.

Once accepted the funding must be utilised in a manner that is in compliance with the Subsidy Control Act 2022 and it is recommended that the Council obtains specialist advice in relation to this.

The Council's must also comply with the Public Contracts Regulations 2015 and the Council's Contract Procedure Rules when appointing consultants and other specialists.

If the recommendations set out in this report are approved, it will result in a number of legal agreements, including services and works contracts which should be referred to legal services to finalise and complete in accordance with the arrangements set out in the Council's Contract Procedure Rules.

Financial Implications:

The IZ attracts an initial allocation of £80m Flexible Spend profiled over 5 years from 2024/25. This allocation was increased to £160m at the 2023 Autumn Statement with the time period for investment extended to 10 years.

The agreement for the use of the increased funding allocation beyond the first five years is subject to a timetable to be set by Government and decisions relating to its allocation will be taken forward in due course.

An initial year 1 allocation of £800,000 has been awarded to Bury Council (on behalf of Bury and Rochdale Council) to progress further design work in respect of the Western Access project.

Given the IZ funding has been allocated from 1st April 2024 and has a 12-month spend requirement (to end-March 25), there is a need to move projects forward swiftly and flexibly to respond to these funding opportunities and adhere to spend deadlines - hence the requested that Cabinet delegated authority to the Executive Director (Place - Business Growth and Infrastructure) in consultation with the Leader of the Council and relevant Portfolio Holder(s), to authorise expenditure in relation to the IZ funding and authorise associated contractual arrangements, agreements and documents.

Appendices:

Appendix A - Northern Gateway Strategic Development Vision (Part A)

Appendix B - Northern Gateway Business Plan (Part B)

Appendix C - Northern Gateway Interim Governance Framework (Part A)

Appendix D – Strategic Board Terms of Reference (Part A)

Appendix E -Northern Gateway Procurement Strategy (Part A)

Appendix F - Western Access Procurement Strategy (Part A)

Background papers:

Places for Everyone Plan – available on request.

Cabinet Report July 2022 and associated Appendices – Available on request.

Atom Valley Strategic Outline Business Case - available on request.

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

Term	Meaning
MDZ	Atom Valley Mayoral Development Zone
IZ	Greater Manchester Investment Zone
MDC	Mayoral Development Corporation
PfE	Places for Everyone
PMO	Project Management Office
SPD	Supplementary Planning Document
SRN	Strategic Road Network

This page is intentionally left blank

Northern Gateway Strategic Development Vision

GM INVESTMENT ZONE

Atom Valley Context

Northern Gateway

- **Investment Zone Status:** Unrivalled opportunity for the city-region to create a vibrant, accessible and dynamic employment cluster for a range of sectors, including dedicated advanced manufacturing zones.
- **Giga-Scale Potential:** Site can accommodate 13 million sq ft and deliver a wide range of building sizes, including the potential for a giga investment.
- **Advanced Manufacturing:** Opportunity to deliver ambitious growth in advanced manufacturing and materials.
- **Strategic Location:** Situated at the junction of M60, M66, and M62, offering excellent highways connectivity that will be attractive to manufacturing and distribution businesses.
- **Transport Infrastructure and Services:** Planned new Metrolink stops, bus rapid transit, tram train, bus services and active travel connections to enhance accessibility.
- **Residential Component:** Includes 2,750 new homes, a primary school, park, retail, sports, and community facilities, with new homes already under construction.
- **Green Ambitions:** Emphasising sustainability with a focus on achieving net-zero carbon emissions, use of green energy across the site and encouraging sustainable travel.

Stakehill

- **Established Industrial Estate:** spanning 200 acres and offering over 2.5 million square feet of industrial and distribution floorspace.
- **Strategic Location:** Adjacent to the A627(M) providing direct access to M62 and M60 motorways.
- **Future Expansion:** Land allocated for around 1650 new homes and 231 acres of new employment space for industrial, distribution and advanced manufacturing uses.
- **Sustainability:** A Local Industrial Decarbonisation Plan (LIDP) is underway, led by Rochdale Development Agency, aiming to achieve net-zero emissions by 2038.
- **Business Community:** The Stakehill Business Improvement District (BID), established in 2021, fosters collaboration among stakeholders to enhance the estate's infrastructure, security, and community vibrancy.
- **Transport Infrastructure and Services:** Proposed Slattocks Railway Station nearby, enhanced bus connections and active travel improvements to enhance connectivity.

Kingsway

- **Premium business park:** adjacent to the M62 J21 and close to the border with West Yorkshire, Kingsway Business Park spans 420 acres.
- **Metrolink Connectivity:** Opened in 2013, Kingsway Business Park has a dedicated metrolink station, connecting the park to Oldham, Rochdale and Rochdale Railway station for onward connections in Manchester City Centre and West Yorkshire.
- **Investment Hotspot:** Home to major occupiers including ASDA, JD Sports, Takechi, WCCTV and recently joined by Danish Crown's £150 million investment. The Greater Manchester Pension Fund (GMPF) and property REITs including Urban Logistics have been major investors into the park.
- **Innovation Potential:** The Atom Valley Innovation Centre at Kingsway Business Park provides a short term opportunity to deliver a landmark facility that will co-locate a series of manufacturing and advanced materials research technology organisations into one place.

Atom Valley Ambition

Northern Gateway | Stakehill | Kingsway

- ▶ **Goal:** Covering sites across Bury, Oldham and Rochdale, this vast employment opportunity will play a pivotal role in making Greater Manchester one of the best places in the world to grow up, get on and grow old.
- ▶ **Scope:** Spanning 1.6 million square metres of employment land and creating 7,000 low carbon homes, Atom Valley prioritises sustainable development and the creation of a lasting legacy of high-quality employment sites that will benefit local communities for years to come.
- ▶ **Impact:** Generating 20,000 high-quality jobs, fostering a skilled workforce to drive economic growth and innovation in advanced sustainable materials and providing flexible employment opportunity for a wide variety of other sectors and industries. Beyond sites, it transforms the fabric of the region, enhancing liveability and prosperity.
- ▶ **Objective:** Establish a nationally significant industry hub for levelling up, prioritising sustainability, innovation, and collaboration between manufacturing and logistics, with an Advanced Sustainable Materials Translational Research facility and Advanced Manufacturing Park.
- ▶ **Approach:** To develop a strong private-public partnership that will provide the necessary infrastructure to accommodate a diverse range of employment uses.
- ▶ **Outcome:** Atom Valley pioneers large-scale employment investment, fostering innovation and prosperity across the north of the Greater Manchester conurbation and beyond. As a nationally significant industry hub, Atom Valley accelerates national prosperity and champions the levelling up agenda, securing a legacy of holistic progress in economy, society, and environment.

Northern Gateway Investment Zone – 12 key principles

1. **Catalyst for Transformation:** Northern Gateway provides a significant opportunity for economic growth across various employment sectors, boosting the productivity and prosperity of the north of the city region.
2. **Strategic Location:** Strategically positioned as a central driver of regional progress, leveraging its connectivity to become a focal point of economic activity within Greater Manchester. Its strategic location has the ability to attract national and inward investment from a multitude of sectors including advanced manufacturing, distribution and logistics.
3. **Advanced Manufacturing:** Spearheading investment and innovation in advanced materials and manufacturing, building on Greater Manchester's world leading strengths in this area and creating a leading hub for innovation and sustainable industry growth.
4. **Scalability and Adaptability:** Over 700 hectares providing unparalleled scalability and adaptability to meet the diverse needs of a range of industries and evolving market dynamics, ensuring flexibility and responsiveness to market demand.
5. **Strategic Partnerships:** Collaboration between private investors, developers, funders, universities and agencies will cultivate innovation at Northern Gateway, driving inclusive growth and enhanced productivity across a multitude of sectors. Collaboration with Universities will be integral to enabling commercialisation of innovation at scale.
6. **Focal Point & Hub:** Fostering collaboration and innovation among businesses, creating a vibrant ecosystem that attracts and nurtures talent, enhancing Greater Manchester's competitiveness, focused on a sustainable materials catapult.

Northern Gateway Investment Zone – 12 key principles

7. **Integrated Sustainability Approach:** Sustainability will be embedded across all aspects, from infrastructure to operations, demonstrating a commitment to environmental responsibility and BREEAM / Well / LEED-certified initiatives.
8. **Job Creation and Skills Development:** Focus on creating job opportunities and empowering local communities through skills development initiatives, fostering inclusive growth and building a skills legacy for businesses and communities.
9. **Integrated Transport Solutions:** Integrated public transport solutions will be implemented at Northern Gateway to improve accessibility and connectivity, offering efficient and sustainable transportation options for residents and workers and connecting to nearby communities.
10. **Promotion of Active Travel:** Northern Gateway will deliver pedestrian-friendly pathways, cycling lanes, and green and blue spaces to promote active mobility, link surrounding communities and enhance connectivity, providing health and wellbeing benefits for local residents, future residents and workers.
11. **Flexible Approach:** Northern Gateway will embrace a flexible approach, allowing for adaptable adjustments to meet the evolving needs and opportunities of Greater Manchester's dynamic landscape and to reflect the sheer scale of the site.
12. **Maximising opportunities for existing communities:** Significant opportunity to deliver new jobs and economic growth in one of the regions most deprived areas through strategic partnerships, investment in skills and training and sustainable transport and active travel connectivity.

Northern Gateway Strategic Development Vision

- ▶ Northern Gateway will be a world-class business community that will help to drive inclusive growth and economic prosperity for Atom Valley and Greater Manchester by becoming the largest and most accessible employment opportunity in the region, delivering:
 - ▶ significant investment into a range of industry sectors at both scale and pace, supporting the region's economy and resilience;
 - ▶ a dynamic and thriving innovation hub for advanced materials and manufacturing, building on Greater Manchester's world leading strengths in this area;
 - ▶ a vibrant and dynamic employment ecosystem where businesses and communities thrive, supported by sustainable transport connectivity and green and blue infrastructure networks;
 - ▶ flexibility and responsiveness to market demands and opportunities; and
 - ▶ a truly integrated approach to partnership working with industry, universities, research partners and institutions, that will develop and harness the skills for the local workforce, establishing a lasting legacy of excellence in training and skills, empowering existing communities as well as attracting and retaining top industry talent.

Northern Gateway pillars

Innovation

Northern Gateway provides a significant opportunity for a range of industries and employment sectors, including the creation of a nationally significant industrial mega cluster capitalising on strengths in advanced manufacturing, materials, and machinery, enhancing national prosperity and delivering levelling up.

Sustainability

Northern Gateway will contribute to our commitment to be net zero carbon by 2038. The future of our planet needs climate change resilience at its heart, with enhanced biodiversity, green and blue infrastructure networks, sustainable resource use and minimising and repurposing waste.

Inclusive Communities

Creating a new and inclusive community with 2750 homes, including low carbon and affordable homes.

Empowering local communities through skills development initiatives, fostering economic inclusivity and social mobility, helping to address national and regional inequalities,

Business and industry

Northern Gateway will attract UK and international firms investing in new distribution and manufacturing premises, and SMEs scaling-up into modern premises, supply chains providing resilience to drive economic growth and spinouts and start-ups ready to move from the lab to the factory to benefit from international standard R&D and skills facilities.

Collaboration

Partnerships with Government, developers, industry, colleges and institutions will attract, retain and develop top talent. We will create a long-term legacy, driving skills and nurturing talent to deliver transformational change to the conurbation.

Connected Places

A modern, affordable and reliable public transport service, with active travel provision and enhancement, will provide a sustainable, connected network of travel routes, linking existing residential areas with new business premises and facilities, providing access to jobs and health and wellbeing benefits.

This page is intentionally left blank

Terms of Reference – Northern Gateway Strategic Board

Version	Approved On	Approved By	Detail of Changes
V1.0			- n/a
V1.1		Northern Gateway Steering Group	- Confirmation of delegated authority - Confirmation of decision-makers

1.0 Purpose and Role

The purpose of the Strategic Board is to provide a centralised and consistent forum for decision-making and the resolution of high-level issues encountered during delivery that have been escalated from the Steering Group. The Strategic Board must ensure all projects are clearly defined from inception agreeing the principles and parameters in which they will be delivered, remaining focused on key principles and deferring detailed analysis to subgroups.

The role of Strategic Board is to:

- Ensure project outcomes align with strategic priorities
- Compliance with Council Constitution, Policy and Cabinet delegations
- Alignment and buy-in of a long-term aspiration and strategy for the site, to provide clear direction to projects in terms of project principles to enable working groups to undertake development of detail
- Identify and share information about wider strategic risks, issues or opportunities which could impact on the delivery of Northern Gateway
- Review and provide a response to risks with a post-mitigation score of 21+ (very high), escalated from the Steering Group
- Direct the development of project briefs, Strategy and Business Cases
- Clarify and set programme requirements and direction
- Review and approve documents as set out in delegation
- Monitor, consider and provide direction on approach to key strategic and / or high-level risks and issues
- Resolution of issues escalated from the Steering Group
- Monitor spend profile and progress
- Consider and make decisions regarding change to agreed scope, and any other change requests made by the Steering Group

2.0 Scope

The Northern Gateway site comprises two allocations within the adopted Places for Everyone Plan:

- JPA1.1 (Heywood/Pilsworth) is a nationally significant proposal for employment development. This allocation within the Northern Gateway is recognised as one of two Investment Zones in Greater Manchester. The site occupies a strategic location adjacent to the M60, M62 and M66 and market analysis considers that this, together with the scale of the opportunity, will attract high quality businesses and employment opportunities.
- JPA1.2 (Simister / Bowlee) will see the delivery of new housing that is well integrated with, and brings positive benefits to, the surrounding communities. The site is located between the settlements of Prestwich and Middleton and borders onto the M60.

The Northern Gateway allocation has the potential to be genuinely transformational and to be a key driver in rebalancing the Greater Manchester economy by boosting the competitiveness of the northern districts.

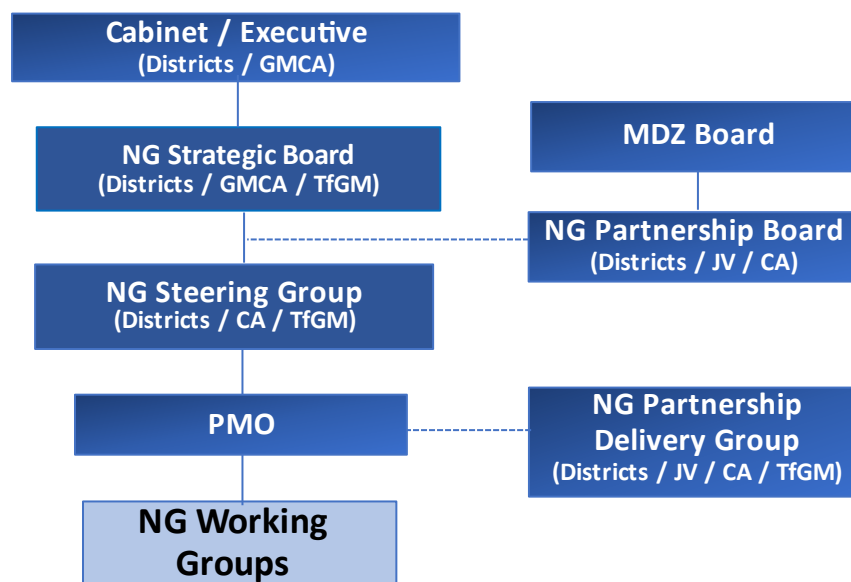
Northern Gateway is the largest and most significant development site in the Atom Valley Mayoral Development Zone (MDZ). The MDZ aims to boost growth and help to create a more balanced economy across the Greater Manchester city region and includes major development sites across the three boroughs of Bury, Rochdale and Oldham.

The MDZ enables districts and partners to work closely together with GMCA, TfGM, national agencies and the private sector to accelerate plans for inclusive growth and sustainable transport for the benefit of local residents. An MDZ Board has been established to oversee the work of the MDZ. The relationship between Northern Gateway and Atom Valley must be retained to maximise the cumulative benefits, maintain partnership support and move forward coherently under the established brand of the MDZ, with the MDZ Board being the vehicle to facilitate this relationship.

3.0 Governance

The Northern Gateway Strategic Board has been established to ensure effective project oversight, delivery and risk management of the project on behalf of Bury and Rochdale Councils and public sector partners.

Strategic Board reports into respective Cabinets and GMCA Executive, who have assigned delegated authority to relevant Director(s) and Portfolio Holder(s) for the delivery of the Northern Gateway project. The Northern Gateway Steering Group reports into Strategic Board. Strategic Board is led by officers from Districts and GMCA and its decision-making process is through Districts. As depicted below, the Northern Gateway Partnership Board will feed into the MDZ governance structure.



The basis for which the Northern Gateway Strategic Board, Project Management Office (PMO) and all other groups within the Governance Framework seek to deliver against is the agreed Strategic Development Vision:

“Northern Gateway will be a world-class business community that will help to drive inclusive growth and economic prosperity for Atom Valley and Greater Manchester by becoming the largest and most accessible employment opportunity in the region, delivering:

- ▶ significant investment into a range of industry sectors at both scale and pace, supporting the region’s economy and resilience;
- ▶ a dynamic and thriving innovation hub for advanced materials and manufacturing, building on Greater Manchester’s world leading strengths in this area;
- ▶ a vibrant and dynamic employment ecosystem where businesses and communities thrive, supported by sustainable transport connectivity and green and blue infrastructure networks;
- ▶ flexibility and responsiveness to market demands and opportunities; and
- ▶ a truly integrated approach to partnership working with industry, universities, research partners and institutions, that will develop and harness the skills for the local workforce, establishing a lasting legacy of excellence in training and skills, empowering existing communities as well as attracting and retaining top industry talent”.

4.0 Membership

Membership of the Strategic Board includes representatives from all public sector organisations associated with the delivery of the Northern Gateway project.

4.1 Core Members

The following core members are required to attend the Strategic Board or arrange attendance by a representative with delegated responsibility. Collectively members of the Board are decision-makers:

Role	Organisation
Chief Executive (Chair)	Bury Council
Chief Executive	Rochdale Council
Executive Director – Policy & Strategy	GMCA
Executive Director - Place: Business, Growth and Infrastructure	Bury Council
Director – Economy and Place	Rochdale Council
Assistant Director Strategy, Planning & Development	Bury Council
Director - Place	GMCA
Delivery Director	GMCA
Group CEO	Growth Company
Transport Strategy Director	TfGM
Head of Strategic Planning	TfGM
MDZ Board Chair	Atom Valley MDZ Chair (ex officio)
Northern Gateway Major Project Manager (Advisor)	Bury / Rochdale Council (non-decision maker)

4.2 Additional (non-core) Attendees

Where additional support and / or knowledge is required, or on a task and finish basis, the following can be requested to join the group as a non-core member:

Role	Responsibility
External Project Managers	<ul style="list-style-type: none">• Responsible for interfacing schemes either within districts or from external organisations• To provide the Strategic Board with timely updates as and when necessary and requested to do so.
Bury / Rochdale / CA Officers	<ul style="list-style-type: none">• Officers from within districts and the CA to attend as required to provide specialist expertise• For example, legal, planning, procurement, business and skills
Consultants and Sub-Consultants	<ul style="list-style-type: none">• Likely to be regularly in attendance to update on work packages• Provide support where necessary on the basis of targeted commissions

Non-core members do not have decision making authority for the group.

Requests for additional member attendance should be directed to the Chair in the first instance.

5.0 Accountability

Matters of a high-level strategic nature or issues which are likely to impact the time, cost or quality delivery of the project, raised either internally or by external partners, should be escalated to the Strategic Board to respond to. Strategic Board are responsible for these matters in addition to the successful delivery of the public sector led workstreams of the Northern Gateway project, and establishment and maintenance of public sector partner relations.

PMO is responsible for ensuring reporting requirements set by the Northern Gateway Governance Framework (v1.10) are met to ensure information is effectively communicated within each representative organisation. Where this is not the case, and the matter cannot be resolved, it will be escalated to Strategic Board. Meeting minutes and supplementary documents may be used to support this process. This will ensure any necessary internal approvals are secured in a timely manner to meet the needs of the project.

Details contained within these Terms of Reference are subject to compliance with statutory / regulatory powers and / or processes.

6.0 Ways of Working and Meeting Arrangements

The Strategic Board will be held monthly, unless required to meet more frequently by exception to meet the needs of the project. Invites will be issued by the Northern Gateway Major Project Manager.

Minutes and an action tracker will be produced following each meeting by the Northern Gateway Major Project Manager. These documents will be agreed by all members.

Members may be contacted between meetings for advice as required.

Meeting agendas, minutes, action tracker and papers will be circulated in advance of each meeting.



The quorum for the meeting will be 2/3 of the established core membership. Should the meeting not be quorate, it will be rearranged. Officers should make every effort to attend the meetings as they are fundamental to the delivery of the Northern Gateway project. Members who cannot attend should make best endeavour to delegate attendance to a relevant deputy.

Where commercially confidential matters need to be discussed, the Chair may arrange separate meetings with relevant parties.

The format of Highlight Reports and additional documentation used to inform Strategic Board of progress made by Working Groups is set out in the Northern Gateway Governance Framework (v1.10), to ensure consistency across projects.

7.0 Agenda

The details of each monthly agenda for Strategic Board will be set by the Northern Gateway Steering Group and will be informed by requirements of all members. Relevant information from the PMO will also inform the agenda.

8.0 Sub-Working Groups

Sub-groups will be agreed and established by the Steering Group as necessary dependent upon work required. Sub-groups will focus on specific project tasks and provide monthly highlight reports which will be shared with Steering Group and Strategic Board.

9.0 Review

These Terms of Reference for the Strategic Board will be reviewed for acceptance on an annual basis, or more frequently if required by exception.

This page is intentionally left blank

Northern Gateway Procurement Strategy

V1.5

August 2024

Contents:

	Page
1. Scope	2
2. Purpose	2
3. Procurement Context	3
4. Role of the PMO	3
5. Public Sector Duties and District Principles	4
6. Social Value	7
7. Approach to Procurement	8
8. Contract Management and Administration	10
9. Conclusions	10
Appendix A – Workstream Procurement Strategy Template	12

1. Scope

The Northern Gateway site comprises two allocations within the adopted Places for Everyone Plan:

- JPA1.1 (Heywood/Pilsworth) is a nationally significant proposal for employment development. This allocation within the Northern Gateway is recognised as one of two Investment Zones in Greater Manchester. The site occupies a strategic location adjacent to the M60, M62 and M66 and market analysis considers that this, together with the scale of the opportunity, will attract high quality businesses and employment opportunities.
- JPA1.2 (Simister / Bowlee) will see the delivery of new housing that is well integrated with, and brings positive benefits to, the surrounding communities. The site is located between the settlements of Prestwich and Middleton and borders onto the M60.

The Northern Gateway allocation has the potential to be genuinely transformational and to be a key driver in rebalancing the Greater Manchester economy by boosting the competitiveness of the northern districts, delivering thousands of quality jobs and thousands of new, quality, low carbon homes linked to sustainable transport.

Northern Gateway is the largest and most significant development site in the Atom Valley Mayoral Development Zone (MDZ). The MDZ aims to boost growth and help to create a more balanced economy across the Greater Manchester city region and includes major development sites across the three boroughs of Bury, Rochdale and Oldham.

The MDZ enables districts and partners to work closely together with GMCA, TfGM, national agencies and the private sector to accelerate plans for inclusive growth and sustainable transport for all modes, to reflect long-term plans, for the benefit of local residents. An MDZ Board has been established to oversee the work of the MDZ. The relationship between Northern Gateway and Atom Valley must be retained to maximise the cumulative benefits, maintain partnership support and move forward coherently under the established brand of the MDZ, with the MDZ Board being the vehicle to facilitate this relationship.

Northern Gateway also benefits from Investment Zone (IZ) status. £160 million in public funding over 10 years will support initiatives and interventions across Greater Manchester's IZs, including new research and innovation, sector-focussed skills programmes, local infrastructure enhancements, and targeted business support, with a focus on advanced materials and manufacturing.

In order to realise the development potential of Northern Gateway, some public sector intervention is required, and is likely to span both the current pre-development stage and into delivery.

2. Purpose

This Procurement Strategy provides a detailed plan of how public-sector commissioned services required to progress delivery of the Northern Gateway project (JPA1.1 and JPA 1.2) will be acquired. It ensures services will be acquired through a fair, transparent and proportionate process, ensuring they are procured in a timely manner, at the right price, and of the right quality and subsequently managed to ensure value for money and alignment with corporate policy.

Agreeing a strategy for procurement ensures roles and responsibilities are understood, activities can be prioritised, the market maintains confidence in public-sector commissioning, and project risk is reduced.

The Strategy sets out the considerations required for any commission associated with the Northern Gateway project, details of workstream specific requirements (see Appendix A), including the need to develop a workstream procurement strategy, and links with the Northern Gateway Governance Framework and Social Value Strategy.

3. Procurement Context

Historically, procurement activity for Northern Gateway has been led by Rochdale, due to resource availability, established procurement systems, and Grant Funding Agreements (GFA) awarded by the Combined Authority detailing Rochdale as the recipient of the funding, therefore requiring Rochdale to appoint any external resource(s) that are required. In turn, this has meant that all contracts entered into have also been managed by Rochdale.

Following the appointment of the Northern Gateway Major Project Manager (a joint resource between Bury and Rochdale Councils but placed within Bury Council) a Project Management Office (PMO) for Northern Gateway was established.

2.1 Role of the PMO

It is agreed that all public-sector procurement for Northern Gateway will be led by the PMO, working in collaboration with partner organisations involved in the relevant workstream, to develop a recommended procurement strategy for Strategic Board approval. Consequently the PMO will be responsible for:

- Administration of any Grant Funding Agreement (GFA), supported by any organisation key to the delivery of the workstream – funding will follow the functional lead for each workstream, with an explicit reporting line back into the PMO.
- Implementation and management / administration of Contract(s), supported by any organisation key to the delivery of the relevant workstream; and
- Coordinating all reporting to enable the Northern Gateway project to be effectively managed.

The level of support required from partner organisations in relation to administration of the GFA and the Contract(s), and contribution to reporting, will be agreed on a case-by-case basis and may become the responsibility of an organisation other than Bury Council should it be deemed more appropriate for a different partner lead.

The reporting requirements set out in the Northern Gateway Governance Framework are as follows – any organisation delivering a workstream on behalf of the Northern Gateway project should follow these requirements:

- the leads of each working group must report into PMO on a monthly (as a minimum) basis. Reports must include a progress update, activities upcoming in the next period, details of any risks identified in the last period, an update on the financial position, forthcoming stakeholder engagement and escalation of issues;

- any contract with a third party should include a requirement for a priced activity schedule, forecast costs for the period of the commission, a requirement to contribute to the management of risk and a Programme, to be updated monthly as a minimum;
- where a Change Request is submitted from a third party, the impact on cost and time must be fully understood and recorded, to be supported by PMO as necessary. Where the impact on cost and / or time exceeds the approved tolerance, this must be reported to PMO for escalation prior to acceptance.

This will enable PMO to coordinate Strategic and Programme-level risks and issues, spend and progress of each workstream. PMO will report up through the Northern Gateway governance structure and will work as part of the Atom Valley structure to share information, maximise opportunities and reduce risk.

Any organisation or individual responsible for leading a procurement or managing the subsequent commission must acknowledge to the requirements set out in the Northern Gateway Governance framework and report into the PMO to ensure a coordinated approach to the project can be maintained.

4. Public Sector Duties and District Principles

4.1. Public Sector Duties

Public Services (Social Value) Act 2012

All public sector organisations have a duty to ensure, as far as is possible, consideration is given to how services can improve social, economic and environmental wellbeing of communities within each borough. Through procurement, there is a need to demonstrate that social value has been sought and achieved in relevant contracts, to support work to address social cohesion, and improve employment, skills development and training opportunities.

The Public Services (Social Value) 2012 Act places a statutory duty on Councils to consider the following, for procurements exceeding the UK threshold of £139,688 (incl. VAT):

- How the economic, social and environmental wellbeing of relevant areas may be improved by the procurement, and;
- How, in conducting the procurement, the council might act with a view to securing that improvement.

Individual organisations implement alternative threshold standards as follows:

- Bury Council – Social Value must be considered in all procurements
- Rochdale Council – Social Value must be considered in all procurements
- GMCA - £100,000 procurement threshold
- TfGM - Social Value must be considered in all procurements above £100,000

See Section 6 for further detail of Social Value requirements in place for any commission associated with Northern Gateway.

Equality Act 2010

Each council has a duty under the Equality Act 2010 to ensure that any procurement undertaken addresses equality and diversity. This means good relations between people from different groups are promoted, equal opportunities are provided, and unlawful discrimination, harassment or victimisation as detailed in the Act is eliminated.

Duties set out in the Equality Act (2010) can be addressed through procurement in a number of ways:

- Ensuring equality and diversity terms and conditions are included within contract documentation;
- Ensuring an open and transparent procurement process; and
- Completion of an Equality Impact Assessment prior to procurement to identify all needs and give due regard to the need to promote equal opportunity.

4.2. Contract Procedure Rules, S151 Rules and Insurance Requirements

All contracts we award must comply with the Public Contracts Regulations 2015 or the lead organisation's Contract Procedure Rules. All procurement activity must also be undertaken with regard for S151 Rules for Contracts and Finance, as well as operating within the bounds of current UK procurement legislation.

Each council has set a limit of minimum requirements for insurance. Where relevant, the minimum insurance limit set by the contracting authority must be made clear as part of any procurement exercise. The relevant council's Finance team must be consulted where the procurement is of high value to ensure the appropriate level of insurance is in place, and any proposal to deviate from the council's minimum requirements must be approved by the relevant Officer (commensurate to Head of Finance).

As such, where either Bury Council or Rochdale Council are leading a procurement, the relevant procurement team, Legal team and S151 officer must be involved from the outset.

4.3. Procurement Thresholds

The obligations set by the organisation leading the procurement, and the whole-life value of the contract will inform the procurement options available in terms of route to market. Once it has been agreed by Strategic Board which organisation will lead a commission, the workstream procurement strategy should set out what the relevant organisational obligations are and how they will be fulfilled.

Post-Brexit, the UK is no longer bound by EU regulations, including those related to public procurement. As a result, the UK has implemented its own public procurement system and no longer participates in the OJEU.

The current (2024) procurement thresholds for the UK are:

	Services or Goods	Works Contract	Social and Other Specific Services
Central Government	£139,688 (inc. VAT)	£5,372,609 (inc. VAT)	£663,540 (inc. VAT)
Other Contracting Authorities	£214,904 (inc. VAT)	£5,372,609 (inc. VAT)	£663,540 (inc. VAT)

If contract spend is over the current UK threshold, tenders must legally be posted on 'Find a Tender'.

As an alternative route to market a public procurement framework could be utilised, the benefits of which can be as follows:

- Requirement for consultants and contractors to provide social and economics outputs which benefit the local community, usually within a defined radius;
- Opportunities for early contractor involvement in the design process;
- Consultants and contractors available on the framework will have already tendered through OJEU based on defined cost and quality parameters;
- Not based on lowest cost, but instead on a collaborative approach to delivering successful outcomes; (appointment is based on a 30% / 70%, cost / quality split. The 30% cost appointment is based on OH&P on anticipated project cost) – the quality response would include assessment of social value and environmental measures;
- Consultant / contractor performance is monitored using KPI's, which reduces the risk of poor delivery quality;
- Risk of legal challenge can be reduced from unsuccessful tenderers reluctant to discount themselves from future opportunities;
- Can be less resource, cost and time intensive than navigating the tender process through the 'Find a Tender' route.

4.4. District Principles

All public sector procurement must demonstrate that best value is being achieved from public spending and subsequent outcomes when any contract is awarded. Best Value is a statutory duty placed on the public sector under the Local Government Act 1999. Best value does not always mean cheapest, and the balance between cost and quality is key to the procurement process. The focus must be on procuring the best service to achieve the required outcomes in terms of what is needed, and not what is a 'nice to have'.

Best value can also be associated with ensuring effective and appropriate procurement procedures are adopted, based on the scale, complexity, and risk associated with projects, meaning more time and resource is focussed on large-scale, complex, and high-value projects and quick, efficient procurement is undertaken for smaller scale projects and work packages. Each public sector organisation has documented Contract Procedure Rules (CPRs) which set out the agreed procurement process and the relevant CPRs must be referred to within the workstream procurement strategy.

Due to the cross-boundary nature of Northern Gateway, there is a need for a coordinated approach to procurement for Northern Gateway. As a result, the default position is that procurement is led by the PMO, which sits within Bury Council, on behalf of partners. Relevant partners will be involved in and support the procurement process. Where there is case that this is not the most appropriate route, and a different organisation is better placed to deliver the workstream a decision request must be tabled at Northern Gateway Strategic Board for approval.

Where there is an instance one authority leads procurement on behalf of the project, and therefore on behalf of both authorities. As such, checks and balances will need to be put in place to provide the PMO with assurance agreed processes are being followed. As a precedent, the following checks and balances have been agreed between Bury and Rochdale Councils for the Western Access SOBC commission where the Rochdale Development Agency (RDA) are the lead organisation:

- Bury Highways to sign-off any Works Information prior to commencement of intrusive surveys etc;
- RDA to provide assurance risk assessments, CDM controls (as relevant) and supervision requirements are in place prior to commencement of survey works;
- RDA to lead on liaising with Bury Highways to ensure necessary licences are in place for works on highway;
- Bury Highways and Northern Gateway Major Project Manager (PMO) to be involved in all design workshops, stakeholder engagement planning, risk management activities;
- Bury Highways to be given sufficient time to review, comment on and sign-off designs within administrative area prior to any design freeze / stage-gate;
- Regular project meetings to take place with all key parties – to include review of risk, issues, programme, costs, stakeholder engagement;
- Production of a monthly Highlight Report by RDA, content to be agreed between Districts, to be shared with PMO, and subsequently Steering Group and Strategic Board;
- Northern Gateway Major Project Manager to review all RDA recharges against programme prior to processing.

Where the delivery of a project, such as the Western Access, will cross the administrative boundaries consideration will be given in the workstream procurement strategy to the required approach to delivery and any need for any transfer of powers to facilitate delivery will be escalated to PMO.

5. Social Value

Under the Public Services (Social Value) 2012 Act public sector organisations have a duty to ensure, as far as is possible, how services can improve the social, economic and environmental wellbeing of communities within each borough. Social Value is central to this Procurement Strategy. A joint Social Value Strategy is being developed, for Bury Council, Rochdale Council, GMCA and TfGM, which will focus on skills, education, the environment and engaging communities in the Northern Gateway site to maximise the benefit to communities in Bury and Rochdale.

The Social Value Strategy should be read alongside and implemented in alignment with the Northern Gateway Procurement Strategy, and subsequent workstream specific procurement strategies. During any procurement exercise, quality question(s) relating to social value must be assessed against how well the outcomes set out in the Social Value Strategy are achieved.

The Social Value Strategy is also intended for use by the Joint Venture and other third-party landowners when undertaking procurement, to ensure opportunities are coordinated and maximised. Work will be undertaken to seek agreement of the Social Value principles through the Joint Venture Board – this will include transmission of any obligations into successors, to cover instances where parcels are likely to be delivered by third party developers.

In developing a joint approach, a series of KPIs will be agreed based around each organisation's priorities. The joint Social Value Strategy will move outputs away from individual partner priorities and into Social Value measures taken from within the Social Value strategy.

These KPIs will be of key consideration during the procurement phase and will subsequently be monitored during any commission to which they applied. The outcomes of the KPIs, and the social value activity, should be presented to Members and the Northern Gateway Strategic Board on a

regular basis, to share good news stories, support council priorities and to satisfy requirements of the Public Services Act in demonstrating how the social, economic and environmental wellbeing improvements for an area are being secured.

The agreed joint approach to Social Value will be developed in collaboration with each organisation's leadership and procurement teams. Key considerations to be agreed include the geographical area of social value benefits to be taken into account and how the KPIs will be measured across the districts.

6. Approach to Procurement

Before progressing any form of procurement, a process to determine and agree the need for, objectives of and approach to the procurement will be undertaken to ensure the services or goods being commissioned are necessary.

The following steps must be considered, and subsequent recommendations presented to the Northern Gateway Strategic Board / Steering Group / in the workstream specific procurement strategies for a decision prior to progressing any procurement.

The approval of the workstream specific procurement strategy will be tabled in-line with the delegations set out in the NG Governance Framework (V1.10):

- NG Strategic Board – procurement up to the value of £500,000
- NG Steering Group – procurement up to the value of £250,000 (Rochdale: between £250,000 and £500,000 with agreement from relevant Portfolio Holder)

6.1. Identify a need – what would the impact be if the work did not take place; are the outputs a priority; are other workstreams dependent on the outputs

6.2. Identify a budget

6.3. Confirm Authority through Scheme of Delegation

Is a key decision or executive decision required?

6.4. Identify SMART Objectives –

- Specific – what is the required outputs of the procurement
- Measurable – what is the success in achieving the output; what will be achieved; how will progress be monitored to ensure success
- Assignable – roles and responsibilities for specific tasks should be clear
- Realistic - Goals must be achievable with available resources
- Time-related – A timeline should be set, with key dates and checkpoints.

6.5. Confirm lead organisation and officer(s)

- Provide details of roles and responsibilities (responsible, accountable, informed and consulted)
- Confirm procurement requirements of lead organisation:

6.6. Make or buy decision -

Once project requirements have been defined, analysis is needed to determine if the outputs can be delivered by existing internal resources, or if external support is required:

- Identify potential suppliers (internal and external)
- Analyse the cost, availability and benefits of each option
- Assess the risks and opportunities of each option
- Make recommendation

6.7. Identify any assumptions made when drawing conclusions about the preferred procurement approach

6.8. Define procurement approach and route to market, to include consideration of:

- **Contract Options - Form of Contract**
 - What provisions are required to respond to change, monitor and review contractor performance and terms to enable termination if required;
 - Form of Contract (ie JCT; NEC; PCSA; task order)
 - Contract option – linked to pricing and level of risk.
- **Procurement Approach**
 - For construction projects, such as Western Access, will a Traditional or Design & Build route be followed;
 - Will the procurement be one or two-stage;
 - Which organisation will lead procurement; which individual(s) will be responsible for procurement, contract management and reporting into PMO;
 - What will the role of other organisations be in ensuring all stakeholder requirements are met.

- **Route to Market**

Following consultation with Legal and Procurement teams to ensure compliance with Contract Procedure Rules, UK procurement thresholds and associated regulations, the route to market must be considered. The whole-life value of the contract will inform procurement options, which may include direct award, call-off on rotation, competitive tender or mini-competition via a framework.

Direct awards can only be used in truly exceptional cases, they are not an easy route to deal with unexpected project delays. From October 2024 the market must be notified each time a direct award is made over £5M. Advice should be sought from Corporate Procurement before progressing a recommendation for a direct award.

- **Available Frameworks**

Dependent on the decision regarding which organisation will lead the procurement and subsequently enter into contract with the chosen party, different frameworks are available to procure the necessary services.

The decision on the best placed framework should be based on previous experience of the frameworks to manage cross-boundary projects, contractual issues including change control, dispute resolution, pain / gain share (if applicable) and risk transfer.

- **Procurement Process**

Once the route to procurement has been agreed, a series of decisions will be required in terms of the need to test the market with an Expression of Interest, the scope contained

within an Invitation to Tender, the % split of price and quality for tender assessment purposes and agreement on the quality questions.

- **Additional Requirements**

Any requirements that the appointed contractor will be required to provide / deliver (such as Programme, priced activity schedule, highlight report etc)

Prior to any procurement, the PMO and lead organisation will prepare a workstream specific procurement strategy which will present the findings of the considerations referred to above and make a recommendation for the Northern Gateway Strategic Board / Steering Group (as defined by the delegation) to decide upon – this includes the allocation of any budget required over and above what is already available. This report will align with the Northern Gateway Business Plan (once in place).

Following approval of the workstream procurement strategy, and the conclusion of the subsequent procurement exercise, Northern Gateway Strategic Board will be required to sign-off a recommendation for appointment of the preferred supplier – the report, developed by PMO and relevant public sector partner(s), presented to Board must include outcomes of assessment of cost and quality and a rationale for the decision reached. The Project Manager will then be able to confirm the appointment with the preferred supplier.

Where a commission will support the development of an individual workstream within the project (*ie Western Access*) a separate Procurement Strategy will be developed to ensure circumstances individual to that particular workstream are considered and reflected within the recommendations.

7. Contract Management and Administration

The PMO is responsible for the implementation and management / administration of any contract however, the level of support required from partner organisations (districts, GMCA, TfGM) in relation to administration of the contract, and contribution to reporting, will be agreed on a case-by-case basis as it may be deemed more appropriate for a different partner lead.

Resource requirement, with a clear set of roles and responsibilities, will be set out in workstream specific Project Initiation Document and there is an assumption adequate resource will be made available to ensure effective contract management of all public sector commissions associated with the Northern Gateway.

8. Conclusion

- 8.1. Following the approval of the Northern Gateway Governance Framework V1.10 the Northern Gateway Procurement Strategy sets out the approach to be taken to any commission relating to the development of the Northern Gateway project.
- 8.2. Initially, Strategic Board must agree for the need for the procurement to take place, and which organisation will be the lead.
- 8.3. Following approval by Strategic Board / Steering Group (subject to cost in alignment with the agreed delegation), a workstream procurement strategy will be developed by the PMO and relevant public

sector partner(s), making consideration of items set out in Section 7. This will be presented to Strategic Board / Steering Group for approval.

- 8.4. Following approval of the workstream procurement strategy and upon completion of the subsequent procurement exercise, the Northern Gateway Strategic Board will be required to sign-off a recommendation for appointment of the preferred supplier – the report, developed by PMO and relevant public sector partner(s), presented to Board must include outcomes of assessment of cost and quality and a rationale for the decision reached. The appropriate Project Manager will then be able to appoint the preferred supplier.
- 8.5. The Northern Gateway Governance Framework sets out reporting requirements for both the lead public sector organisation and the preferred supplier, to be reflected in contract documents (see Section 2.1). The lead Project Manager for each workstream must report into PMO as outlined in Section 2.1 to enable effective management and coordination of the project.
- 8.6. Unless otherwise agreed, the PMO is responsible for the implementation and management / administration of any contract, however the level of support required from partner organisations (districts, GMCA, TfGM) in relation to administration of the contract, and contribution to reporting, will be agreed on a case-by-case basis. The recommended approach will be set out as part of the individual workstream procurement strategy.
- 8.7. The Northern Gateway Procurement Strategy should be read in conjunction with the Northern Gateway joint Social Value Strategy and Northern Gateway Governance Framework (V1.10).

Appendix A:

Proposed workstream procurement strategy template, which takes into consideration requirements outlined in Section 7 of this Strategy - *this is completed as an example only.*

Commission Detail	
Strategic Saturn Model, including Variable Demand Model	
Identified Need	Yes / No – rationale as to why the procurement is needed
Anticipated Budget Requirement	£amount excl VAT <i>To be confirmed once scope agreed.</i>
Budget Confirmed (y / n)	
Confirmed Authority through Scheme of Delegation	
SMART Objectives	S – Atom Valley Strategic Transport Model
	M – <ul style="list-style-type: none"> - Cumulative impact of delivery of Atom Valley on highway network will be known - Need for additional highway intervention can be assessed and justified - Support development of district local plan(s)
	A – TfGM dedicated resource (tbc) to be responsible for procuring and leading the management of the commission as outlined in NG Governance Framework
	R – <ul style="list-style-type: none"> - TfGM dedicated resource required to work with / report into PMO. - anticipated time for delivery is 4 months from appointment. Agreement of scope needed in advance of this.
	T – <ul style="list-style-type: none"> - anticipated time for delivery is 4 months from appointment. Agreement of scope needed in advance of this. - Key dates and checkpoints to be agreed as part of programme upon inception.
Lead Organisation Recommendation	TfGM
Lead Officer(s) Recommendation	TfGM (responsible) NG Strategic Board (accountable)
Make or Buy Recommendation	Make (within the public sector) – TfGM, with some support from external commission(s)
Assumptions	TfGM have capacity to undertake the work
Procurement Approach and Route to Market – Recommendations	
Contract Options – Form of Contract	Task Order
Procurement Approach	
Route to Market	
Available Frameworks	
Procurement Process	
Additional Requirements	

Commission Detail	
Western Access Outline Business Case and Feasibility Design Development	
Date:	11.09.24
Approval:	Northern Gateway Strategic Board (Date: 12.09.24)
Identified Need	<p>Yes</p> <p>External support is required to bring forward the development of the Western Access Outline Business Case and associated feasibility design. This includes recommendations for the following resources:</p> <ul style="list-style-type: none"> - Lead consultant: to lead and coordinate the development of the Outline Business Case, feasibility design and required surveys; ensure cost and risk management in place, ensure ability to identify and acquire any third-party land required is in place; ensure a strategy for Planning is in place, including preparation of planning application(s) – scope to continue services to FBC and construction as required subject to funding and performance; - Contractor for Early Contractor Involvement (ECI): appointed on a three-stage procurement (to construction, subject to funding, KPI's and quality performance) to be procured from early OBC to input into design, deliverability, risk reduction, costs, interface with M66 J3 and delivery strategy; - Design input / critical friend, review of survey outputs and OBC input (Rochdale Development Agency -RDA); - Operational Legal advice: to advise on Statutory Orders, links with Planning Strategy, compensation claims; - Strategic Legal advice; - Independent PM / QS - Lead consultant: to lead SOBC for Western Access Phase 2 (spine road) <p>The RDA will also be involved in the project to support with design development, surveys and business case input – the route for Bury Council to Instruct the RDA is currently being explored.</p>
Anticipated Budget Requirement	£800,000 excl VAT <i>To be confirmed once scope agreed.</i>
Budget Confirmed (y / n)	Yes – end-March 2025 spend (accrued) deadline
Confirmed Authority through Scheme of Delegation	Cabinet approval to be sought 25 th September 2025, to include delegated authority to deliver the scheme
SMART Objectives	<p>S –</p> <ul style="list-style-type: none"> - Western Access (Phase 1 – Pilsworth) Outline Business Case and feasibility design - Western Access Phase 2 (spine road) SOBC
	<p>M –</p> <ul style="list-style-type: none"> - Preferred option for the Western Access scheme will be determined

	<ul style="list-style-type: none"> - Greater understanding of risks, issues, constraints and strategies put in place to mitigate the impacts - Greater cost and time certainty - Need for additional highway intervention can be assessed and justified - Short list and Preferred Way Forward determined for Western Access Phase 2
	A – <ul style="list-style-type: none"> - Bury Council dedicated resource to be responsible for procuring and leading the management of the commission, supported by PMO, as outlined in NG Governance Framework
	R – <ul style="list-style-type: none"> - Bury Council dedicated resource required to work with / report into PMO. - Due to funding approval process and restrictions on spend deadline, time for delivery is 6 months from assumed Cabinet approval at end-September 2025. - Agreement of all scopes, Procurement Strategy and Delivery Strategy is needed in advance of this.
	T – funding (£800,000) accrued spend deadline of end-March 2025 <ul style="list-style-type: none"> - Key dates and checkpoints to be agreed as part of programme upon inception - Master Programme, reflecting all relevant commission outputs, to be developed by lead consultant.
Lead Organisation	Bury Council
Lead Officer(s)	Bury Council (responsible) NG Strategic Board (accountable)
Make or Buy Recommendation	Make - RDA to provide design input, review of survey outputs and OBC input Buy – external services required to act as lead consultant; ECI Contractor; Legal representative – tbc, discussions underway with Bury Council Legal.
Assumptions	RDA have capacity to undertake the work as set out in the scope. Rochdale Council are able to instruct the services of the RDA on behalf of Bury Council due to the joint-council nature of the project. Sufficient procurement and legal resource to prepare required documentation in advance of tenders going live.
Procurement Approach and Route to Market - Recommendations	
Contract Options – Form of Contract	Lead Consultant NEC3/4 Professional Services Contract – Option A (Fixed Price) ECI Contractor NEC3/4 Professional Services Contract – Option E (Cost Reimbursable)

	<p>Legal Representative(s) Service Level Agreement</p> <p>RDA Service Level Agreement (tbc)</p> <p>Independent PM / QS Service Level Agreement</p>
Procurement Approach	<p>Lead Consultant Mini Competition via existing framework</p> <p>ECI Contractor Mini Competition via existing framework</p> <p>Legal Representative Subject to external support being required, direct call off via internal approach (via internal legal support)</p> <p>RDA Work underway to understand how Bury Council can instruct the services of the RDA due to the joint-council nature of the project.</p> <p>Independent PM / QS Call-off from framework on rotation</p>
Route to Market	See above
Available Frameworks Include	<p>North West Construction Hub</p> <p>Procure Partnerships</p> <p>NHS Shared Business Services framework</p> <p>TfGM Highways Framework</p>
Procurement Process	Tbc
Additional Requirements	Tbc

This page is intentionally left blank



Classification: Open	Decision Type: Key
--------------------------------	------------------------------

Report to:	Cabinet	Date: 25th September 2024
Subject:	Adoption of Developer Contributions for Education Supplementary Planning Document	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1. This report details the results of the Developer Contributions for Education Supplementary Planning Document (SPD17) consultation and seeks approval for the final SPD to be formally adopted.

Recommendation(s)

2. It is recommended that Cabinet:
 - i. Note the responses to the public consultation and the proposed post-consultation revisions as set out in Appendix 2 to this report.
 - ii. Approve the revised SPD as the final version to be adopted and published.
 - iii. Delegate authority to the Executive Director (Place), to make any minor non-material editorial amendments to the SPD ahead of its final publication.

Reasons for recommendation(s)

3. SPD17 sets 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. The adoption of the document will ensure that all relevant planning applications are considered against up-to-date procedures, legislation and national planning policy.

Alternative options considered and rejected

4. No other options were considered/were applicable.

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

Background

5. Places for Everyone (PfE) is a joint plan of nine Greater Manchester districts and was adopted on 21st March 2024.
6. 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.
7. 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.

Summary of the Consultation Findings

8. In June 2024, Cabinet members approved a draft of SPD17 for consultation purposes. In accordance with the requirements of the Town and Country Planning (Local Planning) (England) Regulations 2012 and the Council's Statement of Community Involvement, consultation was subsequently undertaken over a six-week period running from 15th July to 19th August 2024 in order to establish stakeholder views on its content.
9. Consultation involved making relevant material available for inspection on the Council's web site; in the reception area of the Town Hall; and at Bury, Prestwich, Radcliffe and Ramsbottom Libraries and at the Tottington Centre. Letters/emails were also sent to relevant contacts that were considered to have the potential to be affected by SPD17. The consultation was also advertised via social media platforms.
10. The consultation generated a total of seven responses - although four of these responded simply to say that they had no comments. These comments and the Council's response to these comments are set out in the Consultation Statement appended to this report.
11. The consideration of these comments has led to the conclusion that SPD17 would benefit from a small number of changes prior to it being formally adopted. In particular:

- Clarification that when a permanent new school is delivered (or the relevant financial contribution is received), no further contributions to temporary provision will be required.
- Reference to developers being liable for the costs incurred with forward funding the provision of a new school in addition to the recovery of the principal sum has been removed.
- Clarification that for large strategic sites, the trigger for release of new provision will be determined on a case-by-case basis to allow flexibility in relation to the timing of release of educational facilities.
- Clarification that any pupil yield resulting from the proposed development which can be accommodated through existing school places will be discounted from the contributions calculation.
- Reference made to staged payments for payment of contributions.

12. In response to the consultation comments received, SPD17 has been updated (see Appendix 1). A consultation summary report (Appendix 2) has also been completed.

Conclusion

13. Members are requested to approve the proposed changes to SPD17 before agreeing to adopt it as fully up-to-date guidance

Links with the Corporate Priorities:

Please summarise how this links to the Let's Do It Strategy.

14. 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:

*Please provide an explanation of the outcome(s) of an initial or full EIA and make **specific reference regarding the protected characteristic of Looked After Children**. Intranet link to EIA documents is [here](#).*

15. The EqIA concludes that there are no negative impacts on equality and a positive impact is recorded.

Environmental Impact and Considerations:

Please provide an explanation of the Environmental impact of this decision. Please include the impact on both **Carbon emissions** (contact climate@bury.gov.uk for advice) and **Biodiversity** (contact c.m.wilkinson@bury.gov.uk for advice)

16. No material environmental impacts.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The post consultation amendments are not accepted.	The amendments are a result of public consultation and having considered the responses received.
The final Strategy is not approved.	A previous Cabinet report approved the draft SPD. The final SPD has been amended in response to comments received and updated information which has become available.

Legal Implications:

17. The statutory requirements for the preparation of SPDs are set out in the Town and Country Planning (Local Planning) (England) Regulations 2012 and paragraphs 8 and 9 of this report sets out how these requirements have been 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:

To be completed by the Council's Section 151 Officer.

18. Adoption of the SPD will support the identification of funding contributions to support the delivery of education infrastructure and additional school places resulting from proposed housing developments.

Appendices:

Appendix 1 – Revised Developer Contributions for Education Supplementary Planning Document

Appendix 2 – Developer Contributions for Education Supplementary Planning Document Consultation Statement

Background papers:

Please list any background documents to this report and include a hyperlink where possible.

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

Term	Meaning
SPD	Supplementary Planning Document
PfE	Places for Everyone

This page is intentionally left blank

DRAFT

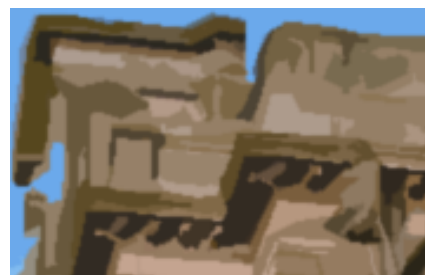
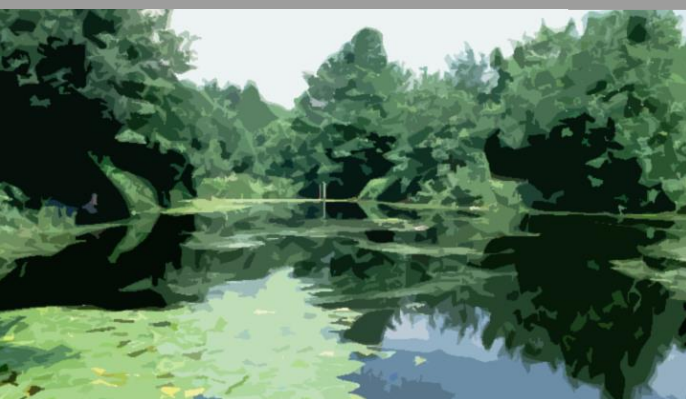
Bury
Council



Supplementary Planning Document 17

Developer Contributions for Education

September 2024



Contents

1	Introduction	3
2	Policy Context.....	4
3	Advice.....	8
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/publications/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 fund temporary solutions to meet education needs where it is not possible to open a permanent new school at the point of need. When a permanent new school is delivered (or the relevant financial contribution is received), no further contributions to temporary provision will be required.

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 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.

- 3.20 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.
- 3.21 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.
- 3.22 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

- 3.23 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.
- 3.24 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.
- 3.25 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.

- 3.26 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. However, any pupil yield resulting from the proposed development which can be accommodated through existing provision will be discounted from the contributions calculation.
- 3.27 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

- 3.28 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 27th June 2024.
- 3.29 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	£19,989
New Build	£23,865

National Secondary

Type of School Place Type	Cost Estimate
Permanent Expansions	£27,492
New Build	£28,912

- 3.30 These up to date costs can be found here: [Local authority school places scorecards, Reporting year 2023 – Explore education statistics – GOV.UK \(explore-education-statistics.service.gov.uk\)](https://explore-education-statistics.service.gov.uk/local-authority-school-places-scorecards/reporting-year-2023)
- 3.31 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.
- 3.32 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 | EBD OG](#)

- 3.33 The cost of a new school or extensions to an existing school will vary depending on size, location, and facilities. As construction inflation is currently high, the detailed figures set out above, will be subject to periodic reviews to reflect updated DfE school place scorecard information.

Strategic Sites

- 3.34 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.
- 3.35 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.
- 3.36 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 landowners to come to an agreed position on the location of the new school on the site.
- 3.37 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.
- 3.38 Where land is to be set aside for a school, the trigger for the release of the new provision will be determined on a case-by-case basis to allow for flexibility in relation to the timing of release of educational facilities.
- 3.39 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 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: $\text{£}19,425 \times 25 = \text{£}485,625$

Secondary school provision: $\text{£}26,717 \times 13 = \text{£}347,321$

Total school places expansion/development cost: £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 payment of the contribution will be used to reimburse the Council for its forward funding which could include for example repaying borrowing that has been incurred as a result. This reimbursement will continue to be deemed necessary for the development to be acceptable, irrespective of the time that has elapsed since the Council has incurred the expenditure.

- 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.

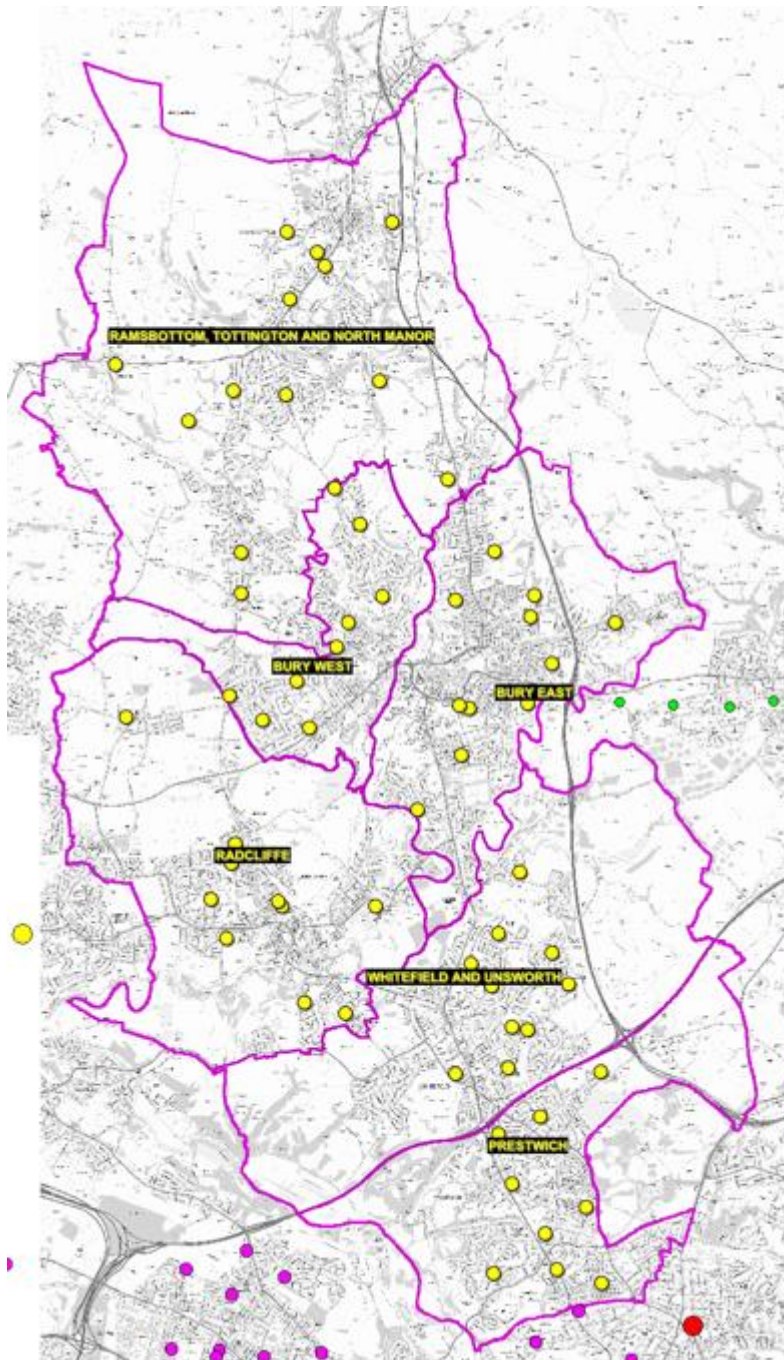
5 Monitoring and Reporting

- 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](#)

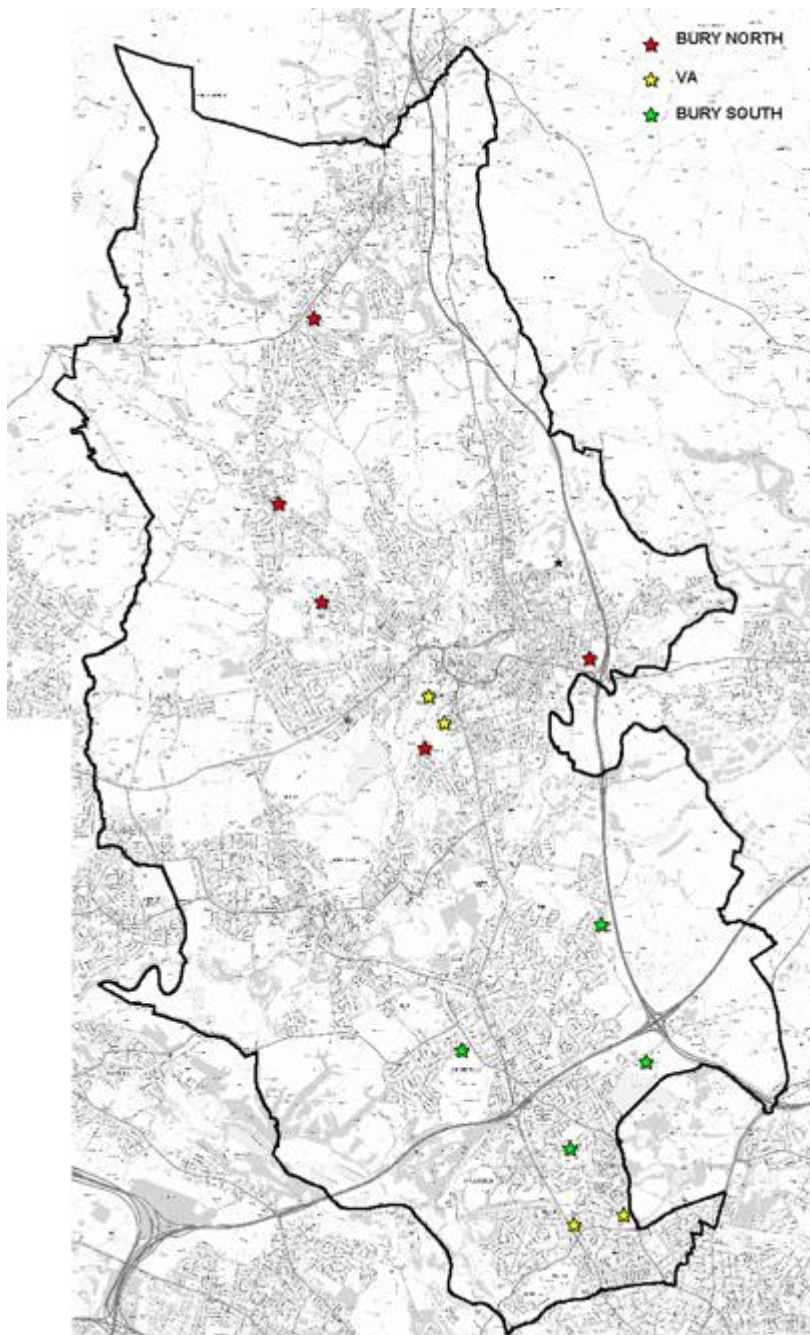
Appendix 1-Pupil Planning Areas



Bury Primary School Pupil Planning Areas



Bury Secondary School Pupil Planning Areas



Draft Developer
Contributions for Education
Supplementary Planning
Document (SPD17)
Consultation Summary
Report

September 2024

Contents

1. Introduction	3
2. Engagement during the preparation of the draft SPD	3
3. Screening Assessments	5
4. Consultation	5
5. Consultation Responses	6

1. Introduction

- 1.1 Draft SPD17: Developer Contributions for Education has been prepared in accordance with the Town and Country Planning (Local Planning) (England) Regulations 2012.
- 1.2 Regulation 12(a) requires the Council to produce a consultation statement before adoption of the SPD. This statement must set out who was consulted, a summary of the issues raised, and how these issues were incorporated into the SPD.
- 1.3 Regulation 12(b) requires the Council to publish the documents (including a 'consultation statement') for a minimum 4-week consultation, specify the date when responses should be received, and identify the address to which responses should be sent.
- 1.4 Regulation 13 stipulates that any person may make representations about the SPD and that the representations must be made by the end of the consultation date referred to in Regulation 12.
- 1.5 Regulation 12 states that when seeking representations on an SPD, documents must be made available in accordance with Regulation 35. This requires the Council to make documents available by taking the following steps:
 - Make the document available at the principal office and other places within the area that the Council considers appropriate; and
 - Publish the document on the Council's website.
- 1.6 This Consultation Statement sets out the extent consultation and engagement undertaken on draft SPD17, highlights the issues raised and how the document was amended to reflect the issues raised.

2. Engagement during the preparation of the draft SPD

- 2.1 Given that SPD17 provides advice and guidance on the Council's approach to seeking developer contributions towards education when determining planning applications for new residential development, it was considered most appropriate to engage with the Council's Development Management team and the Council's Education team during the process of draft the SPD and this took place during April and May 2024.
- 2.2 The following table sets out the key issues raised during the internal engagement and how these have been addressed in the draft SPD.

Issue	How was this incorporated into the draft SPD
Need to clarify that for Secondary Schools the Pupil Planning Area covers the whole of Bury.	Amendments made accordingly
Append a plan showing the boundaries of the six townships.	Plan appended
Include reference to Early Years/Post 16 Education.	Amendments made accordingly
Include reference to the possibility of pooling so that cumulative developments can contribute to a larger objective.	Amendments made accordingly
Consideration should be given to how long finances will be held for before being spent. S106 agreement have a refund date if not spent.	Amendments made accordingly and reference made to monies being refunded if not spent within 10 years from date of receipt
In the section on 'exemptions' make reference to prior approvals/conversions that do not need planning permission.	Amendments made accordingly
Clarify that 'exemptions' only apply to one-bedroom apartments.	Amendments made accordingly
Clarify that 'exemptions' also apply to retirement apartments (C3 use).	Amendments made accordingly
Clarify the position re Outline applications (would normally be conditioned and the RM's and S106 come later).	Text added to clarify that the need for an education contribution will be conditioned at outline stage and will be confirmed following the submission of Reserved Matters
Clarify that DfE cost for school places figures are updated annually.	Amendments made accordingly
The NPPF states that all viability appraisals should be publicly available. Text should be updated to make it clear that all viability appraisals will be published.	Text updated accordingly

3. Screening Assessments

SEA Screening

- 3.1 A Screening Statement has been prepared to determine whether a Strategic Environmental Assessment (SEA) would be required for the draft revised SPD6. The Council consulted Natural England, Historic England and the Environment Agency over a four-week period (08th May to 07th June 2024) in order to seek their views on the conclusions of the SEA Screening Assessment.
- 3.2 Responses were received from Historic England and Natural England, both of whom agreed with the Council that the above assessments would not be required to accompany the SPD.

HRA Screening

- 3.3 Greater Manchester Ecology Unit (GMEU) were consulted on 08th May 2024 to obtain their views as to whether they would need to undertake a HRA Screening in conjunction with the draft revised SPD6. GMEU concluded that it was not necessary to undertake a HRA screening as the SPD would not lead to any effects on European protected sites

4. Consultation

- 4.1 On 05th June 2024, Members approved a revised draft of SPD17 for consultation. Consultation on this draft subsequently took place over a six-week period running from **15th July 2024 to 19th August 2024**.
- 4.2 The draft strategy was available to view on the Council's website and hard copies of the documents were made available for inspection at Bury Town Hall between the hours of 8.45am and 5.00pm (Monday-Friday) and at local libraries and the Tottington Centre during their normal opening hours (see www.bury.gov.uk/libraries for details). The consultation was also promoted on the Council's social media accounts throughout the duration of the consultation.

- 4.3 Comments were invited by email to be sent to planning.policy@bury.gov.uk or by post to the following address:

Development Plans Unit
Strategic Planning and Economic Development
Department for Resources and Regulation
3 Knowsley Place, Duke Street
Bury
BL9 0EJ

5. Consultation Responses

- 5.1 The table below shows that the consultation generated a total of seven responses. Although four of these responded simply to say that they had no comments. These comments and the Council's response to these comments are set out in the table below.

Summary of Comment	Council Response	Change Required (Y/N)
<u>Temporary vs permanent school places</u> The SPD should be amended to clarify that there will be no double counting of the school places required.	Noted. Paragraph 3.9 has been amended to make it clear that double counting temporary and permanent need is not intended.	Y
<u>Delivery of Infrastructure</u> The methodology and cost per place should be clearly defined in the SPD and no deviation applied.	Noted. Paragraph 3.19 has been deleted.	Y
<u>Forward Funding</u> Paragraph 4.20 should be deleted as it suggests that the applicant will be liable for the costs incurred forward funding the provision of a new school in addition to the recovery of the principal sum.	Paragraph 20 amended to remove reference to applicants being liable for the costs incurred with forward funding.	Y
<u>Cost Estimates</u> Paragraph 3.33 should be amended to state that the figures will be subject to periodic review to reflect updated DfE school places scorecard information.	Noted. Paragraph 3.33 has been updated.	Y
<u>Strategic Sites</u> Paragraph 3.38 should be amended to remove reference to constraining housing delivery and instead refer to the use of temporary school places and/or the Council using its powers to forward fund new school provision.	Noted. Paragraph 3.39 has been amended to ensure it aligns with DfE's guidance.	Y
<u>Implementation-timing/phasing of payments</u>	Noted. Paragraph 4.16 makes reference to staged payments.	N

<p>It would be unreasonable and unrealistic to expect significant financial contributions to be paid prior to implementation because the financial break-even point of any housing development is towards the very end of the build programme.</p> <p>An element of staging payments is therefore essential in terms of cashflow and maintaining viability.</p>		
<p><u>Pupil Yield</u></p> <p>The Council should regularly review the strategy for calculating the pupil yield assumptions and subsequent contribution calculations to ensure that they are accurate and that any local factors or more up to date information is considered, as these may alter the pupil yield.</p>	<p>Noted. Pupil yield assumptions will be reviewed as necessary.</p>	<p>N</p>
<p><u>Contribution Calculations</u></p> <p>Paragraph 3.26 should be amended to further clarify that any pupil yield resulting from the proposed development which can be accommodated through existing school places will be discounted from the contributions calculation. This will align with DfE's guidance, as contributions should not be sought for pupil yield which can be absorbed into existing provision, where it has been identified via the local authority school capacity survey that there is capacity.</p>	<p>Noted. Paragraph 3.27 has been amended to ensure it aligns with DfE's guidance (paragraph 19).</p>	<p>Y</p>
<p><u>Approach to release of facilities</u></p> <p>Existing schools should be able to absorb the initial pupil yield in the early phases of development, if the requisite contributions are provided (where applicable).</p> <p>The trigger for release of new provision should therefore be determined on a</p>	<p>Noted. Paragraph 3.39 has been amended to clarify that the release of new provision will be determined on a case-by-case basis and allow for flexibility in relation to the timing of release of educational facilities.</p>	<p>Y</p>

case-by-case basis and allow flexibility in relation to the timing of release of educational facilities.		
<p><u>Schools</u></p> <p>During the morning “rush hour”, the number of cars (with school buses) on Lowercroft Road, Ainsworth Road, Starling Road, Watling Street, High Street and Walshaw Road, is massive and with increased pollution. Any additional schools or extensions to schools would make this problem much worse.</p> <p>Green Belt areas near here should have reduced numbers of new houses and that East Bury should be used more because it is near to the M66 which is used by many commuters to get to work outside Bury.</p>	Noted	N
<p><u>Speeding Cars</u></p> <p>Many people cross the road at the junction of Watling Street / Ainsworth Road, quite close to 3 schools. Also, near this junction is a housing complex for elderly people who need to get to the local medical centre, local shops at Mile Lane. Crossing the road here is difficult as there is no pedestrian island. The road is certainly wide enough to accommodate one.</p>	Noted	N
<p><u>Potholes</u></p> <p>At present, potholes in Bury are worse than in any neighbouring Local Authorities viz. Salford, Bolton, Rawtenstall and Rochdale. This can only get worse with additional housing and schools.</p>	Noted	N

- 5.2 The consideration of these comments has led to the conclusion that the SPD would benefit from a small number of minor changes prior to it being formally adopted. In particular:

- Clarification that when a permanent new school is delivered (or the relevant financial contribution is received), no further contributions to temporary provision will be required.
- Reference to developers being liable for the costs incurred with forward funding the provision of a new school in addition to the recovery of the principal sum has been removed.
- Clarification that for large strategic sites, the trigger for the release of the new provision will be determined on a case-by-case basis to allow flexibility in relation to the timing of release of educational facilities.
- Clarification that any pupil yield resulting from the proposed development which can be accommodated through existing school places will be discounted from the contributions calculation.
- Reference made to staged payments for payment of contributions.

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	Developer Contributions for Education Supplementary Planning Document (SPD)
Lead Officer (SRO or Assistant Director/Director)	David Wiggins
Department/Team	Strategic Planning and Infrastructure
Proposed Implementation Date	September 2024
Author of the EqlA	Natalie Blackston
Date of the EqlA	19.08.24

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

The purpose of the SPD is to supplement Places for Everyone Policy JP-P5: Education, Skills and Knowledge by providing clarity on how and when the Council will seek developer contributions towards education. This includes early years, primary, secondary and those with special educational needs and disabilities (SEND).

The council has a statutory duty to make sure there are sufficient school places across the borough to meet the educational needs of the population. This includes places for early years, primary, secondary, 16-18 years and those with special educational needs and disabilities up to the age of 25.

The SPD will make sure developers are aware of the contributions they are expected to make towards education prior to housing developments taking place. Securing developer contributions where housing development creates an unacceptable impact on school places will also make sure there are adequate education provisions.

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.

The Council will apply a formula-based approach to calculate the financial contribution towards education provision that will be sought from new housing development:

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

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.

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 (state reasons for answering ‘no’)** The SPD is intended to mitigate the impact of housing development where it creates an unacceptable impact on school places. It will not have direct equality impacts on these target groups.

Community/Residents: **Yes (state reasons for answering ‘no’)** The SPD will make sure there are sufficient school places for early years, primary and secondary, and SEND children up to the age of 25.

Third parties such as suppliers, providers and voluntary organisations: **No (state reasons for answering 'no')** The SPD is intended to mitigate the impact of housing development where it creates an unacceptable impact on school places. It will not have direct equality impacts on these target groups.

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

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

Documentary Evidence:

Current Policy

DfE Securing Developer Contributions for Education: [Securing developer contributions for education \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)

Places for Everyone: [Adoption - Greater Manchester Combined Authority \(greatermanchester-ca.gov.uk\)](https://greatermanchester-ca.gov.uk)

Data:

Places for Everyone has already been through the Equality Impacts Assessment (EqIA) process at the relevant stages of development. The SPD expands on policies within Places for Everyone which has already been through the Sustainability Appraisal (SA) process at various stages of its development, where identified social, economic and environmental considerations have been established and assessed as part of the plan making process.

In addition to the SA, Places for Everyone is also supported by a robust and extensive evidence base, that has been tested through the examination process by independent Government Inspectors.

Given the above, the most relevant information at this stage is the extensive range of evidence used in support of the development and examination of Places for Everyone, available to view at: [GMCA – Places For Everyone Joint DPD | Helen Wilson Consultancy Limited \(hwa.uk.com\)](https://gmca-places-for-everyone-joint-dpd.helenwilsonconsultancy.com)

Stakeholder information/consultation:

The SPD will be subject to a six-week public consultation prior to adoption. Full consideration will be given to all the responses received as part of the consultation exercise. Amendments to the draft SPD will be made where necessary. Outcomes from the public engagement will be set out within a Consultation Statement.

Ongoing dialogue has been carried out with internal officers throughout the preparation process for the draft SPD and no issues concerning equality and community cohesion have been raised as a result of these consultations. It is proposed that, following the public consultation, a further version of the Developer Contributions for Education SPD will be brought back to Cabinet for formal approval.

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	We are facing significant challenges in providing school places due to a growing population caused by increased housing	The council has a statutory duty to make sure there are sufficient school places across the borough to meet the educational needs of the population. This includes places for early years, primary, secondary, 16-18 years and those with special educational needs and	The SPD will make sure there are sufficient school places for early years, primary and secondary, and SEND children up to the age of 25. Financial contributions will be negotiated at planning application	Positive

	development, issues within the school estate, and a growing cohort of children with specialised and complex needs. Limited funding from central government makes providing sufficient school places for children of all ages in the borough difficult.	disabilities up to the age of 25.	<p>stage and will be secured through a planning obligation.</p> <p>The planning obligation will specify the amount of the contribution and when it will be paid.</p> <p>The SPD sets out how to calculate the amount of contribution required in each case.</p> <p>The Council will apply a formula-based approach to calculate the financial contribution towards education provision that will be sought from new housing development.</p> <p>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.</p>	
Disability	We are facing significant	The council has a statutory duty to make sure there are	The SPD will ensure there are sufficient	Positive

	challenges in providing school places due to a growing population caused by increased housing development, issues within the school estate, and a growing cohort of children with specialised and complex needs. Limited funding from central government makes providing sufficient school places for children of all ages in the borough difficult.	sufficient school places across the borough to meet the educational needs of the population. This includes school places for children with special educational needs and disabilities.	school places for SEND children	
Gender Reassignment				
Marriage and Civil Partnership				
Pregnancy and Maternity				
Race				
Religion and Belief				
Sex				

Sexual Orientation				
Carers				
Looked After Children and Care Leavers				
Socio-economically vulnerable				
Veterans				

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
Imp	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
------------	-------------	------------------	---------------------	--------------------

3.2 Level of risk identified	No Risk – 0
3.3 Reasons for risk level calculation	The council has a statutory duty to make sure there are sufficient school places across the borough to meet the educational needs of the population. This includes places for early years, primary, secondary, 16-18 years and those with special educational needs and disabilities up to the age of 25. The SPD will make sure there are sufficient school places for early years, primary and secondary, and SEND children up to the age of 25.

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	The SPD will make sure there are sufficient school places for early years, primary and secondary, and SEND children up to the age of 25.
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	David Wiggins	13.09.24	
Responsible Asst. Director/Director	Cris Logue	13.09.24	
EDI			

EqlA Revision Log

5.2 Revision Date	Revision By	Revision Details
		This EqlA will be continually reviewed and updated as the SPD develops.

This page is intentionally left blank



Classification: Open	Decision Type: Non-Key
--------------------------------	----------------------------------

Report to:	Cabinet	Date: 25 September 2024
Subject:	Delivery of a new SEMH Secondary Special School – Land proposal to Department for Education (DfE) & Oak Learning Partnership	
Report of	Deputy Leader and Cabinet Member for Children and Young People	

1.0 Summary

- 1.1 Bury Council is committed to delivering a new special school, working in collaboration with the Department for Education (DfE) and Oak Learning Partnership.
- 1.2 The scheme will be funded and delivered through the DfE Free School Programme with the Council being required to make a modest Capital contribution towards site remediation costs. Indicative Capital costs of £475,000 have been received by the DfE in relation to the Council's obligations. Following detailed assessment these will be the subject of a further report to Cabinet once confirmed. Provision has been made within the Children & Young People Capital Programme to meet these costs.
- 1.3 The revenue funding for the new school will come from the High Needs Block of the Dedicated Schools Grant. As the Council is part of the DfE's Project Safety Valve (PSV), there is a DSG Management Plan agreed with the DfE and the funding for the new school will be built into the plan.
- 1.4 In accordance with delivery of the Free Schools Programme, the DfE requires the Council to provide the land and cover infrastructure costs.
- 1.5 A site has been identified at Redvales Playing Fields at the junction of Manchester Road and Radcliffe Road. The DfE has commissioned detailed feasibility studies into the potential construction of the new school on the Redvales site. These have now been concluded and the outcome is anticipated imminently.
- 1.6 In addition to identifying the site for the new school, the Council is required to enter into a long lease with the DfE to enable Oak Learning Partnership to have use of that site for the purpose of the school.
- 1.7 The DfE is responsible for ensuring the school is delivered, determining the sponsor of the school, developing and delivering the project to construct the school building, and determining when the school can open.

- 1.8 The new 60 place school will provide specialist Social Emotional and Mental Health (SEMH) facilities for children and young people aged 11-16 years.

Recommendation(s)

1. That Cabinet:
- Approve the disposal of the land on a long leasehold basis in accordance with the proposed terms as set out in section 4 of this report
 - Instruct the Monitoring Officer to enter into lease arrangements with the DfE
 - Note that a full proposal of quantified abnormal costs will be submitted to Cabinet for approval at a later date.

Reasons for recommendation(s)

To unlock the delivery of a new SEMH secondary special school

The proposed site boundaries ensure stakeholder considerations including strategic site access, future transport routes and contractor site management

The PSV agreement between the Council and Department for Education (DfE) sets out the requirement for new specialist educational provision, including new Resourced Provision and new Free Special Schools.

The agreement has been subject to consideration by Cabinet and the Children & Young People's Scrutiny Committee and is subject to governance provided by the PSV Delivery Board and Schools Capital Board. The development of new specialist provision seeks to ensure access to a high quality continuum of provision, enabling the majority of children and young people with additional needs to access local provision, with appropriate capacity and resources to meet need.

The proposed new school will greatly enhance Social Emotional Mental Health (SEMH) provision in the borough and increase the overall range and type of provision that is available to support the successful education of children and young people in Bury. In addition, it will provide support for children in mainstream schools in Bury who may be experiencing SEMH difficulties.

Alternative options considered and rejected

The DfE Capital & Property Teams are responsible for site selection, in considering the Council's application an initial desktop analysis of two proposed sites was conducted which resulted in support for use of the land at Redvales, subject to completion of a detailed feasibility study.

To not proceed with the delivery of a new SEMH secondary special school.

Report Author and Contact Details:

Name: Paul Cooke
Position: Strategic Lead (Education)
Department: Children & Young People
E-mail: P.Cooke@bury.gov.uk

Name: Roger Frith
Position: Head of Land & Property
Department: BGI
E-mail: r.frith@bury.gov.uk

2.0 Background

- 2.1 In common with many other local authorities Bury is seeing an increasing number of children and young people presenting with Special Educational Needs and Disabilities (SEND) requiring support within a special school setting.
- 2.2 Historically, Bury has been served by two Special schools, Millwood Primary Special School and Elms Bank High School.
- 2.3 The Local Authority has a statutory duty to constantly review the specialist provision available for children and young people with SEND, whilst also ensuring that there are sufficient specialist places available to meet the needs of the growing SEND population.
- 2.4 Bury Council and the Department for Education (DfE) have entered into a 'Safety Valve' agreement, which includes planning for future specialist provision, working closely with partners to develop a financial plan and forecast model, and identifying measures to increase access to local provision in Bury.
- 2.5 The Council has thus embarked on a SEND transformation programme and one of the key objectives is to reduce the number of out of borough placements by expanding in borough specialist provision, targeted at the right areas of need.
- 2.6 The Council's strategy for responding to the growth in demand for places seeks to ensure access to a high-quality continuum of provision, enabling the majority of children and young people with additional needs to access local provision, with appropriate capacity and resources to meet need.

This continuum will comprise:

- Inclusive mainstream schools, ensuring that the majority of children and young people can be supported in their local mainstream school.

- Mainstream schools with Specialist Resourced Provision, where those children and young people whose needs can be met in a mainstream setting, but with additional support, have access to local provision.
- Special schools, building additional capacity to enable a local solution to be available to the majority of children and young people who require a special school place.

2.7 In respect of the additional special school capacity, this is to be achieved through the provision of two new Secondary Special Schools, funded through the DfE special free school programme, and the expansion of Millwood Primary Special School.

2.8 The first of these new Special Schools, Brookhaven, opened in February 2024, located on Parr Lane, Unsworth.

2.9 This report sets out the approach to the development of proposals for the second new secondary special school, which is at an early stage in development and expected to become available in 2026/27.

3.0 The Special Free School: Redvales High School

3.1 Local authorities no longer have the statutory power to establish new schools. All new schools must be established as a Free School. Only a limited number of Free Schools are supported and can only proceed if approved by the Department for Education (DfE). Once approval is granted, the DfE is then responsible for ensuring the school is delivered, determining the sponsor of the school, developing and delivering the project to construct the school building, and determining when the school can open. The scheme will be funded through the DfE Free Schools Programme, with the Council being required to make a modest Capital contribution towards site remediation costs.

3.2 The application for this second special free school was pre-approved in principle under the safety valve agreement. In response to the growing demand for specialist school places the Council submitted an application to the DfE in 2022 for a 60 place secondary special school.

3.3 The new school will have two main purposes:

1. To provide specialist Social Emotional and Mental Health (SEMH) facilities for children who are struggling with the mainstream environment on a full time, part time or fixed/short term intervention basis.
2. Act as a centre of excellence and support for the local communities and schools and possibly the wider sub region providing:
 - a. Staff training and development by Social Emotional and Mental Health (SEMH) specialists to help Children and Young people remain in mainstream education.
 - b. A base for multi-disciplinary outreach services supporting schools, colleges, parents and employers to improve children's outcomes.

3.4 The new free school is intended for children who:

1. Have an Education Health and Care Plan (EHCP) which identifies Social Emotional Mental Health (SEMH) as the primary need and who currently attend mainstream schools or alternative provision, who are struggling with the setting and for whom an academic environment away from mainstream would be most appropriate – these should be long term or permanent placements, the duration being dependent on their age, level of development, support and environmental needs.
2. Currently attend Independent Non-Maintained schools due to the lack of provision within the borough (addressing this would increase parental choice).

3.5 The proposed site

- 3.5.1 In submitting its application to the DfE, the Council was required to identify sites on which the new school could potentially be constructed. It is a condition of application that the Council provide the land on which a new school is to be developed.
- 3.5.2 The Council's Land & Property team identified two potential sites of sufficient size to accommodate the school, both within Council ownership, and each with the potential to be developed. Both of these sites were included within the application to the DfE.
- 3.5.3 The DfE Capital & Property Teams are responsible for site selection, in considering the Council's application an initial desktop analysis of the two sites was conducted which resulted in support for use of the land at Redvales, subject to completion of a detailed feasibility study.
- 3.5.4 The Free School application was subsequently approved, and a sponsor Trust identified. There now follows a long process before the school can be formally established. Key amongst this process is the ability to construct the new school building on the identified site.
- 3.5.5 The DfE has commissioned Mott McDonald to carry out a feasibility study into the potential construction of the new school on the Redvales site. This process involves undertaking site surveys, both non-intrusive and intrusive, to determine the suitability of the land, but also looks at a range of other constraints to development including any planning restrictions or limitations, access and highways related issues, environmental impact, and any other considerations that could impact on the ability to construct the new school. The feasibility studies have now been concluded are awaiting internal approval from the DfE.
- 3.5.6 One constraint to development will include any current designation that applies to the land. In the case of Redvales, the land is designated as Public Open Space. In order to demonstrate to the DfE that this does not represent a risk to

delivery of the project, it requires the Council to take the necessary steps to comply with legal requirements and release the public trust in the land in accordance with S123(2A) Local Government Act 1972. In February 2024 the Council published statutory notices of its intention to dispose of the land. Due to the number of objections to the Public Open Space Notices, a report was submitted to Cabinet on 4 September 2024 and subsequently approved.

3.5.7 The feasibility study is intended to identify potential constraints to development and other factors that will impact on the design of a building. Only after the feasibility is complete, and if it demonstrates the potential to construct a new school on that site, will the DfE progress the scheme to more detailed design, and the stakeholder and public engagement that will be required.

3.5.8 Community engagement will be extremely important to the delivery of the project and the Council is committed to working with the DfE to engage with all stakeholders to hear and understand any concerns they have. Ordinarily this would come later in the process once detailed designs were being developed, but the Council recognises that there is a level of anxiety, particularly from neighbouring residents. Therefore, the following programme of engagement is proposed:

- Meet with Ward Councillors, with DfE input – describe the process, timelines, and key milestones particularly for stakeholder and resident input.
- Briefing to residents – potentially using the above narrative regarding the proposed new school, supplemented by input from DfE describing the process, timelines, and key milestones particularly for stakeholder and resident input.

3.5.9 Planning process: Only after the feasibility study is complete, and if it demonstrates the potential to construct a new school on that site, will the DfE progress the scheme to more detailed design, and the stakeholder and public engagement that will be required.

3.5.10 The cost of constructing the new school building will be met by the DfE, with the exception of site-specific costs including the provision of access and associated highways works, site remediation including demolition of existing buildings, and any relocation costs relating to existing uses, and costs arising from planning conditions. Indicative Capital costs of £475,000 have been received by the DfE in relation to the Council's obligations. Following detailed assessment these will be the subject of a further report to Cabinet once confirmed. Provision has been made within the Children & Young People Capital Programme to meet these costs.

4.0 Leasehold terms

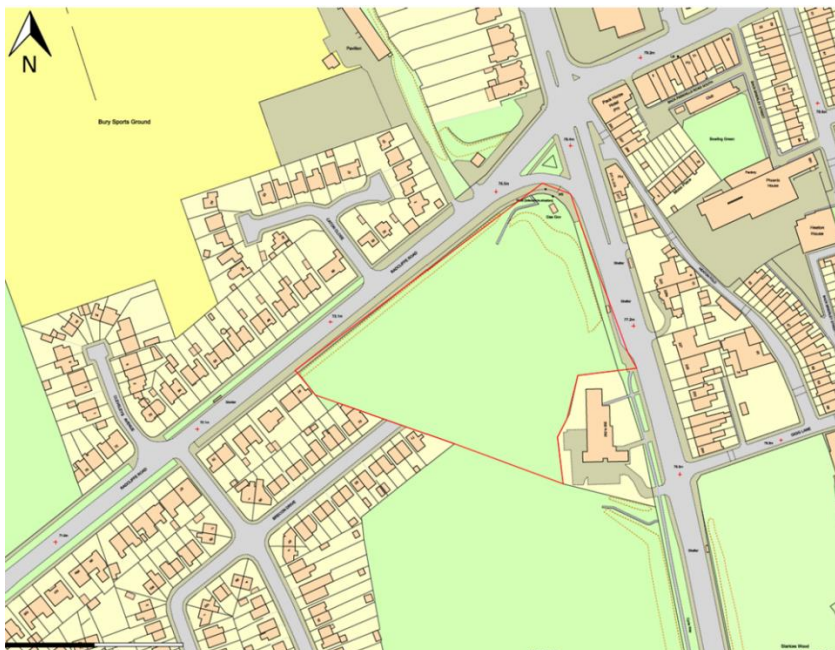
In accordance with the delivery of the Free Schools Programme, the DfE requires the Council to provide the land and cover infrastructure costs.

A site has been identified at Redvales Playing Fields at the junction of Manchester Road and Radcliffe Road. The DfE has commissioned detailed feasibility studies into the potential construction of the new school on the Redvales site. These have now been concluded and the results are anticipated imminently.

In addition to identifying the site for the new school, the Council is required to enter into a long lease with the DfE to enable Oak Learning Partnership to have use of that site for the purpose of the school. The agreement between the Council and DfE must set out the clear boundaries of the site to be included on the lease.

To provide security and clarity to the DfE throughout the feasibility process, the Council is proposing to grant a 125 year lease to the DfE on a peppercorn rent.

Plan of the proposed red edge is shown below:



The proposed red edge of the leasehold provides suitable land for the delivery of the proposed secondary school.

The DfE requires vacant possession of the site to enable the development of the site to commence.

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:

*Please provide an explanation of the outcome(s) of an initial or full EIA and make **specific reference regarding the protected characteristic of Looked After Children**. Intranet link to EIA documents is [here](#).*

A full EIA has been completed, all impacts identified are neutral with mitigations in place

Environmental Impact and Considerations:

*Please provide an explanation of the Environmental impact of this decision. Please include the impact on both **Carbon emissions** (contact climate@bury.gov.uk for advice) and **Biodiversity** (contact c.m.wilkinson@bury.gov.uk for advice)*

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
Outcome of feasibility studies	Awaiting confirmation of outcome from DfE
Objections to the site of the new school	Community engagement, briefings, planning process

Legal Implications:

1. The proposed free special school in Borough is consistent with the Safety Valve programme aims.
2. An EIA has been completed addressing potential impacts of the proposals.
3. The legal requirement to advertise public open space has been undertaken.
4. A lease term of 125 years at a peppercorn rent are standard terms in respect of DfE leases.

Financial Implications:

The estimated capital costs of £475k have been included in the capital programme and will be funded from uncommitted capital grant. The revenue costs of the special school will be funded from the High Needs Block (HNB) of the Dedicated Schools Grant. The HNB had a deficit of £18.6m as at 31st March 2024. The current projected deficit for 31st March 2025 is £20.1m. There is a deficit recovery plan which is subject to the Safety Valve arrangements with DFE. The revenue implications (savings) are not currently built into the recovery plan and therefore the opening of this school will improve the plan and forecast deficit. The net estimated savings are as follows:

	Assume 7 Months from September 26			Full Year 2027-28		
	No of Pupils	Per Pupil £	Total £	No of Pupils	Per Pupil £	Total £
Place Funding	60	10,000	350,000	60	10,000	600,000
Historic TPPG	60	660	23,100	60	660	39,600
Less Increase In HNB Grant	30	-6,000	-105,000	60	-6,000	-360,000
Less Increase in TPPG			-23,100			-39,600
Net Placement Cost			245,000			240,000
Top Up Funding at Band B x 15%	4	11,300	26,367	8	11,300	90,400
Top Up Funding at Band C x 75%	23	13,500	181,125	46	13,500	621,000
Top Up Funding at Band D x 10%	3	18,000	31,500	6	18,000	108,000
TOTAL Top Up Funding	30		238,992	60		819,400
Net Cost of Special School 2026/27			483,992			1,059,400
Saving in Independent School Costs	30	56,000	-980,000	60	56,000	-1,680,000
Net Saving			-496,008			-620,600

The main assumptions around these estimates are:-

- The school will open in September 2026
- The school will have 30 pupils in September 26 and 60 in September 27.
- All of these pupils would otherwise have attended more expensive independent special schools.

Appendices:

Please list any appended documents.

Background papers:

Please list any background documents to this report and include a hyperlink where possible.

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

Term	Meaning
DfE	Department for Education
SEMH	Social Emotional Mental Health

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	Delivery of a new Secondary Special School – Land proposal to Department for Education (DfE) & Oak Learning Partnership
Lead Officer (SRO or Assistant Director/Director)	Stephen Holden
Department/Team	Children & Young People
Proposed Implementation Date	25.09.2024-Cabinet Date
Author of the EqIA	Rachael Stirk
Date of the EqIA	17.06.24

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

The Department for Education (DfE) is working collaboratively with Bury to establish a new school that fits within the local authority's strategic vision for children and young people with special educational needs and disabilities (SEND) in the borough. This opportunity is intended to identify and meet untapped demand for a special free school as a supplement to Bury Council's existing resources.

Consequently, the Council is committed to delivering a new special school, working in collaboration with the DfE and the chosen sponsor, Oak Learning Partnership.

The proposed new school will greatly enhance Social Emotional Mental Health (SEMH) provision in the borough and increase the overall range and type of provision that is available to support the successful education of children and young people in Bury. In addition, it will provide support for children in mainstream schools in Bury who may be experiencing SEMH difficulties.

Local authorities no longer have the statutory power to establish new schools. All new schools must be established as a Free School. Only a limited number of Free Schools are supported and can only proceed if approved by the DfE. Once approval is granted, the DfE is then responsible for ensuring the school is delivered, determining the sponsor of the school, developing and delivering the project to construct the school building, and determining when the school can open. The scheme will be funded through the DfE Free Schools Programme, with the Council being required to make a modest Capital contribution towards site remediation costs.

In response to the growing demand for specialist school places the Council submitted an application to the DfE in 2022 for a 60 place secondary special school. The application for this second special free school was pre-approved in principle under the safety valve agreement.

The new school will have two main purposes:

1. To provide specialist Social Emotional and Mental Health (SEMH) facilities for children who are struggling with the mainstream environment on a full time, part time or fixed/short term intervention basis.
2. Act as a centre of excellence and support for the local communities and schools and possibly the wider sub region providing:

- a. Staff training and development by Social Emotional and Mental Health (SEMH) specialists to help Children and Young people remain in mainstream education.
- b. A base for multi-disciplinary outreach services supporting schools, colleges, parents and employers to improve children's outcomes.

The new free school is intended for children who:

1. Have an Education Health and Care Plan (EHCP) which identifies Social Emotional Mental Health (SEMH) as the primary need and who currently attend mainstream schools or alternative provision, who are struggling with the setting and for whom an academic environment away from mainstream would be most appropriate – these should be long term or permanent placements, the duration being dependent on their age, level of development, support and environmental needs.
2. Currently attend Independent Non-Maintained schools due to the lack of provision within the borough (addressing this would increase parental choice).

In accordance with the delivery of the Free Schools Programme, the DfE requires the Council to provide the land and cover infrastructure costs. In addition to identifying the site for the new school, the Council is required to enter into a long lease to enable Oak Learning Partnership to have use of that site for the purpose of the school. The agreement between the Council and DfE must set out the clear boundaries of the site to be included on the lease. To provide security and clarity to the DfE throughout the feasibility process, the Council is proposing to grant a long leasehold to the DfE on a peppercorn rent.

A site has been identified at Redvales playing field, at the junction of Manchester Road and Radcliffe Road. Surveys of the site have been undertaken, including the recently completed Phase 2 ground investigation, of which the DfE is currently awaiting results. The DfE is working closely with Oak Learning Partnership to develop the school's requirements through the development of School Specific Brief (SSB), Schedule of Accommodation and corresponding Adjacency Diagrams. This will allow for the preferred Control Option to be developed which will conclude the feasibility study.

It is anticipated that this school will become available in 2026/27.

A link to the Cabinet report is included here: [Delivery of a new SEMH Secondary Special School – Land proposal to Department for Education \(DfE\) & Oak Learning Partnership](#)

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: **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 Project Safety Valve (PSV) agreement between the Council and Department for Education (DfE) sets out the requirement for new specialist educational provision, including new Resourced Provision and new Free Special Schools.

The agreement has been subject to consideration by Cabinet and the Children & Young People's Scrutiny Committee and is subject to governance provided by the PSV Delivery Board and Schools Capital Board. The development of new specialist provision seeks to ensure access to a high quality continuum of provision, enabling the majority of children and young people with additional needs to access local provision, with appropriate capacity and resources to meet need.

In common with many other local authorities Bury has seen an increasing number of children and young people presenting with Special Educational Needs and Disabilities (SEND) requiring support within a special school setting.

Historically, Bury has been served by two Special schools, Millwood Primary Special School and Elms Bank High School.

The Local Authority has a statutory duty to constantly review the specialist provision available for children and young people with SEND, whilst also ensuring that there are sufficient specialist places available to meet the needs of the growing SEND population.

The Council has embarked on a SEND transformation programme and one of the key objectives is to reduce the number of out of borough placements by expanding in borough specialist provision, targeted at the right areas of need.

The Council's strategy for responding to the growth in demand for places seeks to ensure access to a high-quality continuum of provision, enabling the majority of children and young people with additional needs to access local provision, with appropriate capacity and resources to meet need. This continuum will comprise:

- Inclusive mainstream schools, ensuring that the majority of children and young people can be supported in their local mainstream school.
- Mainstream schools with Specialist Resourced Provision, where those children and young people whose needs can be met in a mainstream setting, but with additional support, have access to local provision.
- Special schools, building additional capacity to enable a local solution to be available to the majority of children and young people who require a special school place.

In respect of the additional special school capacity, this is to be achieved through the provision of two new Secondary Special Schools, and a Primary Special School funded through the DfE special free school programme, along with the expansion of Millwood Primary Special School.

The first of these new Special Schools, Brookhaven, opened in February 2024, located on Parr Lane, Unsworth. This is the second of the new Secondary Special Schools.

Data:

Bury Council is facing shifting demographic pressures, with falling rolls in primary schools, whilst continuing to see growth in demand for secondary school places. Coupled to this is the disproportionate demand for specialist provision, which has continued to grow year on year across both primary and secondary phases. Historically, Bury has limited Special School capacity in the form of one primary special school and one secondary special school. The local area will benefit from a new Special Free

School, opened by Shaw Education Trust in February 2024. Planned and potential housing development will begin to mitigate the falling rolls, and potentially increase the demand for specialist provision still further.

The overall lack of special school provision across both the Primary and Secondary sectors means that our existing special schools cater for pupils with an increasing range of needs, including those who present with Social Emotional and Mental Health (SEMH) needs. This puts significant pressure on the existing special school places and also increases the demand for Independent Non-Maintained Out of Borough (OOB) places. We know that over the past few years the lack of maintained special school places has resulted in large cohorts of pupils with identified Social Emotional Mental Health needs in Independent Non-Maintained Out of Borough provision, many now at Secondary level but whose placements began in Primary. Whilst it is hoped that there will be some Children and Young people, currently educated out of borough in the independent sector, who could return to their community this might not be appropriate for all. However, the new school would have the benefit of avoiding the need for children to have to leave the borough due to the lack of specialist provision, and appropriate early intervention and support.

The school will be designed and staffed to accommodate the age profile and a flexible range of interventions. Staff will be multi-skilled able to work in both classroom and outreach situations.

The new school would fit into the continuum of provision which supports:

- Meeting the needs of pupils with Social Emotional and Mental Health (SEMH) within local school settings,
- Transition into specialist provision where needs cannot be met in mainstream schools, and
- Re-integration back into local mainstream settings following a period of time in specialist provision.
- The new school is primarily aimed at meeting the needs of Children and Young people with the most complex Social Emotional and Mental Health (SEMH) needs which require a permanent specialist placement.

The feeder schools for the new school would be:

- i. Any primary school where a child with Social Emotional and Mental Health (SEMH) needs is transitioning from year 6 to year 7. Transition in Bury is not in isolation and is planned with the primary inclusion leads who support and ensure that it is managed carefully to meet individual pupil need.
- ii. Also, Bury Council will place Children and Young People with an Education Health and Care plan (EHCP) from mainstream secondary schools following a placement breakdown, and where it is felt that a permanent specialist placement is the best option to meet the needs of the student.
- iii. Any pupil placed in independent non-maintained provision outside of the borough would be prioritised for return and re-integration into Bury, where this was appropriate for the pupil. The Free School would ensure that there were

local quality services available as part of Bury's local offer, reducing the need for placement in independent specialist provision out of borough.

Arrangements for transition

As pupils will have an Education Health Care (EHC) Plan, transition will be managed through a transition review or interim review of the EHC Plan (unless an annual review was co-incidentally due); this would be supported by the SEN Team.

i. Area of SEN Provided For

The Children and Young People admitted to this school will require extensive therapeutic intervention to deal with their Social Emotional and Mental Health (SEMH) needs. The expectation is that all pupils will have an Education Health Care (EHC) Plan which identifies SEMH as the primary area of need. We expect there to be a large degree of co-existence with other Special Educational Needs and Disabilities (SEND) needs, especially Autistic Spectrum Condition, Attention Deficit Hyperactivity Disorder, Oppositional Defiance Disorder and Disruptive Mood Dysregulation Disorder.

As a result, we expect these pupils to present with issues such as:

- Low self-esteem and shame linked to failure in mainstream setting
- Significantly delayed social communication skills
- Significantly delayed speech and language development
- Insecure attachment to adults
- Low resilience and vulnerability to exploitation
- Emotional abuse and neglect
- Physical abuse and exploitation
- Inappropriate behaviours consistent with attempts to express and seek help for all the above.

Consequently, most pupils will join the school after unsuccessfully transitioning to mainstream education and the bulk of consultations for admission will probably be received in Years 8 and 9. We expect the leadership team to work with the local authority and mainstream schools to identify pupils at risk of placement breakdown earlier and clarify the referral pathways so that more pupils are identified in Year 7 and in primary to avoid drifting into unsuitable settings.

We would not encourage placements as late as Year 10 except in exceptional circumstances as it is difficult for the therapeutic approach to achieve the type of progression we are looking for in a short time scale.

We anticipate an entry profile and class organisation along the following lines:

Year Group	No of Students	No of Classes
Year 7	6	1

Year 8	9	1
Year 9	15	2
Year 10	15	2
Year 11	15	2
Total	60	8

In the first year of operation, we anticipate:

Year Group	No of Students	No of Classes
Year 7	6	1
Year 8	8	1
Year 9	8	1
Year 10	8	1
Total	30	4

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 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.

Other services in support

There is investment going into services through the Bury Local Transformation Plan 'Let's Do It'. This has been co-produced by Bury Council and Bury CCG with investment going into:

- i. Healthy Young Minds HYM school link worker
- ii. Healthy Young Minds Crisis Care Planning Support Team (four rapid response teams across the North West footprint) form part of the Inclusion Social Emotional and Mental Health Partnership offer
- iii. School Nurses supporting early identification, consultation and support for mental health
- iv. For social care, the ambition with Bury's Early Help Transformation model is to provide assessment, early identification and care planning through a multi-agency team approach to support pupils in education settings.

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	The new school will cater for pupils aged 11-16.	Creation of additional local capacity for students with SEND	N/A	Positive
Disability	Accessibility to the building to facilities, and to learning	Scheme design	During the design development of the scheme there will be 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
-------------------	--------------------	-------------------------	----------------------------	---------------------------

3.2 Level of risk identified	
3.3 Reasons for risk level calculation	Low Risk-0 No risk as positive impact.

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	24/06/24	
Responsible Asst. Director/Director	Stephen Holden	24/06/24	
EDI	L. Cawley	24/06/24	

EqlA Revision Log

5.2 Revision Date	Revision By	Revision Details

This page is intentionally left blank



Classification: Open	Decision Type: Key
--------------------------------	------------------------------

Report to:	Cabinet	Date: 25 September 2024
Subject:	Bury Art Museum	
Report of	Cabinet Member for Culture, Economy and Skills	

Summary

Bury Art Museum (BAM) is a Grade 2 listed building in Bury Town centre, home to over 2000 works of art and 60,000 Museum artefacts. Opened in 1901, Bury Council have recently been awarded a restricted £589,545 Arts Council grant from the Department of Culture Media and Sport MEND Capital Programme with £65,505 match funding from Bury Council's Capital programme for essential and urgent repairs to the BAM roof. The grant is restricted and can only be used to repair the BAM roof. It will fund a quantity surveyor, conservation architect and building contractor.

As part of the Grant Agreement, Bury Council will need to enter into a Deed of Covenant with The Arts Council of England with restriction on title over the freehold of the project asset for a period of 15 years, confirming that Bury Council will operate the building as an Accredited Museum once the building works are complete for a period of 15 years.

A procurement process is required to award contracts for a Quantity Surveyor with a value of £12,278 and Heritage Architect, with a value of £32,350. Five local contractors will be approached to provide quotes for The Conservation Architect and Quantity Surveyor roles with support from Star Procurement.

Recommendation(s)

1. To note the award of £589,545 from The Arts Council with £65,505 match funding from Bury Council with a total cost of £ 655,050.04
2. To request approval to draw down of the £589,545 grant to Bury Council in phases as set out in the Arts Council Awards Schedule
3. To note the Grant Agreement requirement to enter into Deed of Covenant with The Arts Council of England with restriction on title over the freehold of the building for a period of 15 years. This means Bury Council commits the building to a minimum period of 15 years as an Art Museum.
4. Instruct the Monitoring Officer to undertake all legal work associated with the grant agreement.
5. To note the procurement process for a Quantity Surveyor and Construction Manager £12,278 limit and Heritage Architect £32,350 limit.
6. To approve the start of the procurement for a main building contractor for [works] up to a value of £526,924. This will be subject to a further Cabinet report in December 2024 to approve the contract.

Reasons for recommendation(s)

Approval to draw down the budget, approve the requirement to enter into a Deed of Covenant and approve the procurement process is sought so that the first phase of the MEND grant is released by The Arts Council.

Alternative options considered and rejected

There are no alternative options, the roof needs urgent repairs and the Arts Council have awarded a grant to enable this work to be carried out. If the grant is not drawn down, the work cannot continue. Do nothing is not an option as the building requires urgent work to the roof.

Report Author and Contact Details:

Name: Nicky Parker

Position: Director of Culture

Department: Operations

E-mail: N.parker@bury.gov.uk

1. Background

The Arts Council Museum Estate and Development Fund (MEND) is a capital fund targeted at non-national Accredited Museums and Local Authorities based in England to apply for funding to undertake vital infrastructure and urgent maintenance backlogs which are beyond the scope of day-to-day maintenance budgets.

The criteria for the MEND Fund have been set by the Department for Digital, Culture, Media and Sport (DCMS), Arts Council England, Historic England (HE) and The National Lottery Heritage Fund (NLHF). The grants are administered, awarded and monitored by Arts Council England. Funding has been provided by DCMS.

Bury Council has been awarded a restricted grant of £589,545 from the MEND Fund to carry out essential repairs to the BAM roof. This has been matched with £65,505 funding from Bury Council's Capital Programme as set out in the Funding Agreement between The Arts Council and Bury Council.

Bury Council is required under the terms of the Funding Agreement to enter into a Deed of Covenant with The Arts Council of England with restriction on title over the freehold of the building for a period of 15 years. This means Bury Council commits the building to a minimum period of 15 years as an Art Museum.

Bury Council is required under the terms of the Funding Agreement and its own procurement rules to ensure that a competitive tendering process is undertaken. This will include invitations to 5 local QAs and Heritage Architects to quote for the work followed by an open invitation to tender on the Chest for the main building contractor.

2. Progress to date:

Bury Council submitted the MEND Grant in Aug 2023 when the project was at RIBA Stage 3. Since then, the amount requested has been approved by The Arts Council and match funding has been secured from Bury Council's capital programme. Approval to draw down this grant is sought from Cabinet.

Listed Building Consent was submitted (LBC application 70518) and has been secured.

Legal work is required to enter into a Deed of Covenant with Arts Council England for a period of 15 years and approval is sought from Cabinet to commence

Five local companies have been asked to submit quotes for the Quantity Surveyor and Heritage Architect roles.

The procurement of a main building contractor will be via open invitation to tender on the Chest, and it is proposed that the QA and Architect will form part of the evaluation panel.

3. Funding

The total project cost is £655,050 funded from the £589,545 MEND Grant and £65,505 match funding from Bury Council.

The capital cost headlines are as follows:

Cost item	Total Cost £
Pre-construction	2,000
Construction	526,924
Quantity Surveyor £12,278 and Heritage Architect £32,350	44,628
Other fees and charges	28,660
Contingency	52,838

Payment schedule

The payment schedule is set out by the Arts Council. Payments 1 and 4 are scheduled. Payments 2 and 3 are indicative and can be drawn down in line with project progress and expenditure incurred.

Payment	Amount	Date	Conditions of Payment
Payment 1	£176,863 (30%)	Date TBC (from 17/04/2024 subject to conditions of payment)	Payment 1 can be claimed once the legal work to enter into a Deed of Covenant with Arts Council England is completed.
Payment 2	To a maximum of £176,864 (30%)	Date TBC (Indicative date Oct 2024)	• Evidence that you have received all appropriate statutory consents to undertake the Agreed Project

			<ul style="list-style-type: none"> • A copy of the tender review report and or Agreed Contract Sum for the Agreed Project that has been followed • An interim activity report form • An updated budget • An updated cashflow • An updated risk register • An updated timetable of work • Evidence that you have secured all the funding for the Agreed Project
Payment 3	To a maximum of £176,864 (30%)	Date TBC (Indicative date Apr 2025)	<ul style="list-style-type: none"> • An interim activity report form • An updated budget • An updated cashflow • An updated risk register • An updated timetable of work • Evidence that you have secured all the funding for the Agreed Project
Payment 4	£58,954 (10%)	Date TBC (Original date 25/11/2025)	<p>The final payment will be made on completion of:</p> <ul style="list-style-type: none"> • A final activity report • A statement of income and expenditure for the Agreed Project that has been certified by an independent qualified accountant • Submission of a costed maintenance and management plan • Submission of a completed MEND project evaluation form • Provision of confirmation and evidence of registration of Security

The BAM revenue budget has been reduced by £100K pa following changes made to Tourist Information and an increased income target.

4. Links with the Corporate Priorities:

‘The government estimates that creative industries generated £126bn in gross value added to the economy and employed 2.4m people in 2022. A range of research is also examining the way in which creative industries and the arts can positively impact wellbeing’ DCMS 2022

GMCA launched its new Cultural Strategy, ‘Create GM’ in August 2024. It sets out the strong links between culture and economic growth, care and health through its Creative Health work.

Bury Council has published its Cultural Strategy setting out how the cultural institutions in Bury will contribute to the Let's do it! principles of Inclusive Growth, Wellbeing and Equality and Diversity.

The Cultural Strategy is rooted in strong co-operation between the various cultural partners in Bury including the Bury Art Museum who between them have developed a strong cultural and events offer across the Borough. This has led to an increased footfall across Bury Town Centre as evidenced in Council monitoring around the use of the UKSPF grant. Increased footfall leads to increased spend in the town centre and is a catalyst for attracting new residents to Bury. This includes the very successful Bury Art Festival, the Food and Drink Festival, Pride and National Heritage Weekend which Bury Art Museum has delivered with partners.

The events programme has equality and diversity at its core and Bury Art Museum events is working with locally based community groups and individuals through the Community Arts Grants Programme ensuring that art and creativity reaches all part of the Borough and its diverse communities of place and interest.

It is essential that the Art Museum building is fit for purpose and the repair of the roof is key to both protecting the collection, preserving the listed building and contributing to the delivery of the Let's do it! Strategy.

5. Equality Impact and Considerations:

Once the building contractor is appointed, a full schedule of works will be available which will determine how much of the building may have to temporarily close. The procurement specification will set out the need for minimum disruption and an EqIA will follow once any closures are known. This will be included in a further Cabinet report once the procurement of the building contractor is ready to be approved.

6. Environmental Impact and Considerations:

The project to make essential repairs to the BAM roof includes the following work:

-
- Repair to glazed roof lights (skylights)
 - Repairs to parapets and valley gutters
 - Increase capacity for rainwater disposal
 - Better understanding of below ground drainage
 - Masonry repairs
 - Repair of internal plasterwork

As part of the social value considerations, the procurement process will seek any further enhancements the companies can provide to support Bury Council meet its carbon neutral and wider climate change commitments although these may be limited due to the listed status of the building.

Solar panels were considered during the application process to MEND. Standard solar panels could not be used as these would have blocked out the light to the upper galleries. The gallery was built as a top-lit gallery, with natural light, so to block

out the light would spoil the original characteristics of the Grade II Listed Building. Integrated solar panels were considered but the physical/geographical positioning of the roof means that solar panels would not generate enough power to make them viable.

Insulation will be added to the slate roof. The glass replacing the existing panels will be double-glazed and therefore the thermal efficiency of the building will be improved.

7. Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
1. Risk of unknowns once building work begins	Surveys have already taken place by a heritage architect in order to submit the MEND bid.
2. Building work causes a closure period for the ART Museum.	The work completed to date on surveys indicates that this will not be necessary
3. The design work will not be compatible with listed building status.	The heritage architect will be subject to a competitive tendering process where experience of working on listed buildings will be critical. The architects who have quoted for work are all from the Historic England preferred list

8. Legal Implications:

The Council must comply with the terms of the Arts Council England grant funding as set out in the report.

The Deed of Covenant contains a restriction on title over the freehold of the project asset for a period of 15 years.

Solicitors undertaking to register at the Land Registry within 28 days.

Provision of supplementary legal documents to include evidence of local authority cabinet approval or equivalent for the acceptance of the grant on the terms and conditions provided and delivery of the Agreed Project, certificate of title and letter of undertaking as to registration at the Land Registry (in Arts Council England's standard form) by the Organisation's appointed solicitors as set out in Clause 9.1 of the Standard Terms and Conditions.

The Standard Terms and Conditions – MEND set out further obligations at page 8 onwards.

The procurement of the works mentioned in this report must be compliant with the Contract Procurement Regulations 2015 (the Regulations) and the Council's Contract Procedure Rules (CPRs).

It is noted that compliant competitive procurement processes have been commenced in respect of the appointment of the quantity surveyor and conservation architect, and these contracts may be awarded in accordance with the CPRs subject to the grant funds being made available.

It is further noted that the building works will be the subject to competitive tender via the open procurement procedure in accordance with the Regulations.

9. Financial Implications:

There is 10% match funding of £65,505 within the agreed Capital Programme.

There is a risk of unknown costs once the works begin although this has been mitigated by the fact that surveys have already taken place by a heritage architect in order to submit the MEND bid.

10 Appendices:

none

11 Background papers:

None

This page is intentionally left blank



Classification: Open	Decision Type: Non-Key
--------------------------------	----------------------------------

Report to:	Cabinet	Date: 25 th September 2024
Subject:	Adoption Annual Report	
Report of	Deputy Leader and Cabinet Member for Children and Young People	

Summary

1. This is the annual report from the Regional Adoption Agency (RAA): Adoption Now. Adoption Now acts as the adoption agency on behalf of six local authorities: of Bury, Bolton, Blackburn with Darwen, Oldham, Rochdale and Tameside.
2. The report highlights that a slightly higher number of Bury children have been made the subject to Placement Orders in the year 2023/24, compared to the previous year, but that there have been difficulties in matching children with prospective adopters.
3. The report suggests that the predominant reasons for difficulties in matching are two-fold. Firstly, several of the children waiting for matches had notable additional needs, sometimes with implications for their future well-being. Secondly, the report notes the increasing shortage of adopters which is affecting all family finding activity, with the 58 adopters recruited in 2023/24 being the lowest number of adopters recruited since the RAA began in 2017 and a lower figure than that achieved by the six constituent local authority adoption services in the year preceding the creation of the RAA. The report also shows a 3-year decline in the number of enquiries about adoption and applications to become an adopter.
4. The report notes that the decline in adopter approvals is a national trend and that the cost-of-living crisis is felt to be a contributor to the reduction in enquiries and overall reduction in adopters. Analysis of the RAA's own data around reasons for withdrawal from the approval process after application partly confirms the view, while also noting that financial stability is often one factor amongst others in the final decision not to proceed as an adopter.

Recommendation(s)

5. Cabinet members should note the report and consider the key issues raised within the report.

Reasons for recommendation(s)

6. Under the national standards for adoption, all adoption agencies must provide to their responsible body, in this case the executive side of the local authority, a written report on the management, outcomes and financial state of the agency. The report must enable the executive to monitor the management and outcomes of the services in order to satisfy themselves that the agency is

effective and is achieving good outcomes for children and/or service users, Further the report should enable the executive to satisfy themselves that the agency is complying with the conditions of registration. The report should also address any previous issues raised that require action or remedy. The annual report seeks to satisfy this requirement.

7. Regional Adoption Agencies were formed from 2017 onwards with the aim of improving outcomes for children by delivering services at a larger scale and encouraging innovative practice. Local authorities retain a statutory responsibility for adoption, but delegate some or all this work to RAAs. On 1 August 2023, there were 32 RAAs delivering services on behalf of 149 local authorities. This means that RAAs are responsible for delivering most of the adoption practice in England.
8. Bury children are allocated to and held by Adoption Now social workers at the conclusion of care proceedings when a Placement Order is made authorising the placement of a child with a prospective adopting family.

Alternative options considered and rejected

9. Not Applicable. Provision of this report to the council's executive is a statutory expectation for local authority-controlled adoption agencies.

Report Author and Contact Details:

Name: Karen Barrick
Position: Head of Service – corporate parenting
Department: Childrens
E-mail: k.barrick@bury.gov.uk

Background

10. It is essential every year that an annual report highlighting the activities of the adoption service is provided to the Council.
 11. This report will be made available during any inspection of children's services.
-

Links with the Corporate Priorities:

Please summarise how this links to the Let's Do It Strategy.

12. Adoption is one of the clearest and purest expressions of commitment to others within your community. Adoption can be a transformative experience for both birth parents and children. It teaches patience, empathy, and selflessness and provides a loving family home for local vulnerable and needy children.
-

Equality Impact and Considerations:

Please provide an explanation of the outcome(s) of an initial or full EIA and make **specific reference regarding the protected characteristic of Looked After Children**. Intranet link to EIA documents is [here](#).

13. No EIA required.

Environmental Impact and Considerations:

Please provide an explanation of the Environmental impact of this decision. Please include the impact on both **Carbon emissions** (contact climate@bury.gov.uk for advice) and **Biodiversity** (contact c.m.wilkinson@bury.gov.uk for advice)

14. No implications.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation

Legal Implications:

To be completed by the Council's Monitoring Officer.

- 14 Provision of this report is in line with obligations to provide an update to the Executive of the Responsible Body being Cabinet at the Council.
15. The report is for noting and considering only and does not require Cabinet to Make a decision.

Financial Implications:

To be completed by the Council's Section 151 Officer.

15. There are no financial implications arising directly from this report.

Appendices:

Please list any appended documents.

Background papers:

Please list any background documents to this report and include a hyperlink where possible.

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

Term	Meaning

Adoption Annual Report

2023/24



Executive Report

1. Introduction

Achieving adoption for children contributes to improving outcomes for the most vulnerable children and young people in line with priorities outlined in other Council plans.

Adoption Now is a Regional Adoption Agency providing adoption services on behalf of six Local Authorities – Bolton, Blackburn with Darwen, Bury, Rochdale, Oldham and Tameside. It is hosted by Bolton Council. Bury children's cases are held by Adoption Now social workers from Placement Order onwards.

This report covers the financial year 2023/2024, ie. 1st April 2023 – 31st March 2024. Data in this report relating to children with a plan of adoption is local data relating to Bury children however, adoption support and recruitment data covers the whole Region unless otherwise stated.

2. Adoption Agency Business - Children

2.1 **Headline Data**

21 Children being tracked with possible plan of adoption at 31st March 2024.

16 Children with new Should be Placed for Adoption decisions.

16 Children made subject to a Placement Order.

6 Children matched with a prospective adoptive family.

6 Children joined a prospective adoptive family.

12 Children adopted.

2 Children were placed with carers under Fostering for Adoption Regulations.

0 Children had their Should be Placed for Adoption decision reversed.

16 Children waiting for a family on Placement Order at 31st March 2024.

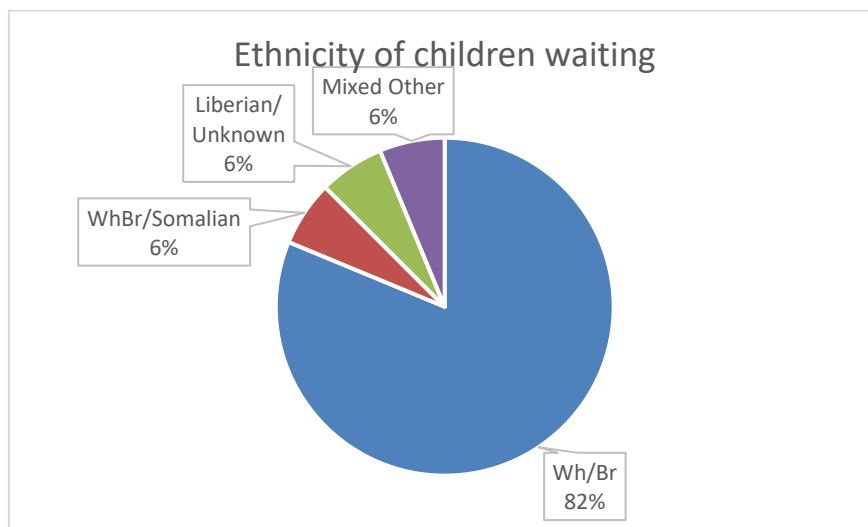
2.2 **Analysis**

After a busy first half the year in terms of decision making the second half of this last financial year saw a further **4** children made subject to a decision that they should be placed for adoption (SHOBPA) meaning that for the whole year a total of **16** children had new plans of adoption. This is a slight increase on last year's figure of 14 but not as high as the 4 year peak in 2021/22 of 24 decisions made. The number of Placement Orders made this year has mirrored SHOBPA decision unlike in previous years, evidencing that the court are on the whole agreeing with Local Authority plans and that court decisions are being made in regards to children with plans of adoption.

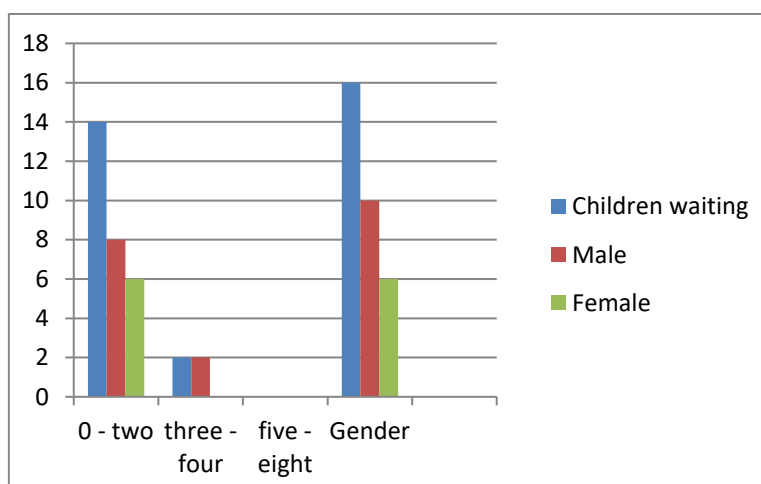
What is notable in the data however is that the number of matches and placements (children joining adoptive families) has not followed the same trajectory with families having only been found for **6** children within the year. This is reflected in a rise in the number of children waiting at the end of year point, up from 6 last year to **16** this year. This is concerning as it can indicate difficulties in finding appropriate families for children with plans of adoption.

Some indication as to the reasons behind this can perhaps be seen by exploring the demographic of children with new plans of adoption in the previous year. This shows that out of 14 children who received new plans of adoption in 2022/23, only 65% percent were White British with the remaining 5 children representing 5 different ethnicities between them. In addition, whilst none of the children were in the older five years plus age bracket, only 4 were aged two years of under. If these are indeed factors, then one would expect to see evidence of this also in the demographic of the children waiting with a Placement Order for a family.

In fact, only 3 of the 16 children were of non-White British ethnicity with two of these having some Black African heritage. Statistically Black children are known to wait disproportionately longer for a family than other children. Notably both of these children also have maternal mental health histories which pose additional risks in terms of their own prognoses.



In terms of the ages of those children waiting there is arguably less reflection of the figures seen above in relation to last year's decisions, with all but two of the children waiting aged 2 or under. It is perhaps notable that there are more males than females as whilst this does not always equate to longer wait times, out of those adopters who specify a preference more tend to have a preference for girls.



Therefore, neither ethnicity nor age appear to account for the low number of matches and placements made and the higher number of children waiting. Another factor that can lead to longer waiting times for children is being part of sibling groups with a plan to live together. 4 of the 16 children are part of sibling groups of 2. Additional needs relating to health, development and behaviour are also major factors in it being more challenging to find families to meet these needs. 1 child is noted to have significant health difficulties. This

same child along with one other has developmental delay. Maternal health and mental health histories which may have genetic implications for the child is a factor in relation to this second child plus 5 others, and some of these have also experience neo-natal abstinence symptoms following maternal drug use in pregnancy. Therefore overall, **8** children have notable additional needs or implications for future well-being.

It seems likely therefore that a combination of these factors is at least in part impacting upon the ability to find families able to parent these children in a more timely fashion. Some staffing issues in relation to capacity have also been noted in the last year and are being addressed but this may also have impacted to some extent. Over the past twelve months there has also been an increasing shortage of adopters which is affecting all family finding activity at present.

What is encouraging is that at the point of year end **7** children were progressing towards a match with identified families including **4** out of **8** children who had waited over 200 days. A further child in this cohort, and the child who has waited longest, has experienced significant delay due to a family being identified but the foster carer then applying to court independently to adopt him. That court case was ongoing at 31st March 2024. Another two foster carers were considering, with the Local Authority's support their ability to adopt the children in their care one who has significant health needs and the other a sibling group of two.

Of the remaining **5** children waiting, 1 had only be subject to a Placement Order for less than a month. A family had previously been identified for 1 child but the family withdrew when it became clear that the plan was for this child's sibling to be placed alongside if adoption becomes their plan. The longest wait time for any child without a link or exploring foster carers is 201 at 31st March and relates to a sibling group of 2 who both have some level of additional need and future health uncertainty.

5 of the children with links had plans to be placed with Adoption Now adopters (excluding the two foster carers with whom discussions were being had). **50%** of the children who joined families were placed with Adoption Now adopters. For Bury children this is below the target of 60% in house placements over this past year although overall the target was exceed in relation to all children. The 5 children with inhouse links will go some way to redressing this balance and every effort is made to ensure equity across the six local authorities that Adoption Now serves whilst equally ensuring the right matches are progressed.

2.3 Family Finding Activity

Professional links and relationships have continued to result in some positive matches. Link Maker continues to be used as a key tool in-house as well as externally to allow adopters to see the children who are in need of a family for themselves. Filters are used on Link Maker to ensure that the best use is made of in-house families before decisions are made to look externally, whilst also ensuring that this is done in a timely fashion to avoid unnecessary delay for any child. Link Maker continues to be a useful tool with some adopters expressing interest in children who we might not have immediately considered for them based on their preferences. The regional placement group continues to operate, meeting on a 6 weekly basis to encourage matches with local voluntary adoption agencies as the advantage both in terms of children's identity and in terms of support in children being placed within the North West is recognised.

Profiles for children who are waiting longer or who it is anticipated are likely to wait longer are shared monthly with Regional Adoption Agencies across the North West, and this consortium of RAA's continue to plan and run joint Activity/Fun days for children and adopters waiting across the North West region alongside the Voluntary Adoption Agencies in the area. Currently these are being funded by the DfE who recognised the innovative work being done by Adoption Now and North West RAA's in terms of this collaborative working.

All Adoption Now approved adopters, regardless of their location are immediately available to Bury children, and most place profiles on Link Maker whilst progressing through Stage 2 of their assessment to enable early links to be made.

It is the Agency's practice to search for a family within Adoption Now in the first instance and then to look further afield to other RAA's or Voluntary Adoption Agencies. For all children, but particularly those who it is anticipated will wait longer, initial in-house searches are completed anonymously pre-Placement Order to avoid delay once an order is made.

2.4 Quality Assurance

Quality of practice in relation to children with plans of adoption is measured in a number of ways including, but not exclusively, timeliness, quality of recording and report writing and outcomes.

Timescales: The Scorecard data for children adopted between 1st April 2023 and 31st March 2024 is as follows:

Measure		Average time taken
Placement Order to Matching (A2)	Scorecard Indicator - 121 days	198
Child entering care starting adoption placement (A10)	Scorecard indicator – 426 days	581

Both average timescales exceed the targets. The A10 timescale takes into account court proceedings and therefore the Agency has less control over this target, however the A2 timescales indicates the length of time that a child has waited for a family to be found and progressed to formal match, and therefore higher timescales can indicate issues with the quality of practice and performance. It is important when considering this however to factor in a number of things including the cohort of children adopted and the local and national picture in terms of adopter sufficiency at the time.

In relation to the cohort of children, only **2** children had previously been placed under Early Permanence arrangements. These children experienced no wait in joining their family after placement order was made and would usually contribute to bringing the overall average down a little, however they represent only 14% of the overall number of children adopted. Sadly only **1** other child was matched within the target timescales.

The cohort of children includes **3** sibling groups of **2** representing 50% of the children and this, along with the fact that both children in one of the sibling groups had additional needs (1 having been born at 25 weeks and experiencing health implications and the other with more significant attachment difficulties), and the children in another sibling group were aged 4 and 6 years old has undoubtedly contributed to the higher overall average. The sibling groups alone waited between 164 and 261 days before they were matched with families, although with the lowest of those figures being for the older sibling group of two, this is a positive achievement.

5 other single children also have some level of additional need. Of these **1** had development, speech and language delay, **2** were at higher risk of being affected due to maternal drug and alcohol use and **2** have severe eczema which prevented them from living in a house with a furred animal, significantly reducing the number of adopters available. Significantly 3 of the 12 children had an element of Black heritage with two of these also having additional needs and 1 being aged 4 and therefore slightly older. As mentioned above

Black children statistically wait longer and this was certainly true for these three children with their waiting times ranging from 204 to 300 days.

Add to the above, the growing shortage over adopters over the latter period that these children were placed and the lack of timeliness does not appear to be a strong indicator of poor performance or quality but of efforts to achieve the best outcomes for these children.

Recording: Regarding reports presented to panel, **86%** of the Adoption Permanence Reports/Support Plans and **57%** of the Child Permanence Reports presented for a match were deemed to be Excellent or Good with the remainder being satisfactory for the making of a decision. One Child Permanence Report (representing **14%**) was deemed to be poor but did not prevent a decision being made due to the quality of the Adoption Permanence Report. Training is being delivered 3 times a year by Adoption Now to help improve the quality of Child Permanence Reports.

Case records held on the Local Authority system as well as those held on the Adoption Now system receive regular management oversight. The Agency is aware that some improvements are required in relation to the quality and quantity of record keeping on the Adoption Now system which is in part due to difficulties experienced by case holding social workers in managing two systems. Development work is underway to provide better feedback regarding the quality of case recording and also to improve the quality of recording.

Outcomes: **0** children had previously made plans of adoption reversed by the Agency Decision Maker during this last year, indicating that the court is generally in agreement with the Local Authority decisions being made and that it has not been necessary to changes any plans as a result of being unsuccessful in family finding for any child. In addition, there have been **0** disruptions over the past year involving a Bury child. When a child moves in with adopters but is unable to remain there and moves out prior to an adoption order being made, this is classed as a disruption. The lack of disruptions not only this year but over the past three years is a very strong indicator that that appropriate matches and placements are being made and families are being well supported in their early days together.

As indicated above 2 of the children adopted within the last year were originally placed through Early Permanence arrangements which means that at the point of adoption they have had minimal moves with one of these children having gone straight from hospital to the family that has become their permanent home. A further 2 children were placed with Early Permanence carers during the year. This is very positive although the aspiration would be to place more children with prospective adopters under this arrangement where it is appropriate however, whilst there has been a year on year increase in the number of adopters offering Early Permanence, the increasing shortage of adopters now is resulting in many of these being matched with children waiting. It is not currently possible to reserve adopters solely for the purposes of Early Permanence unless the adopters themselves expressly wish to wait.

3. Adopter recruitment

3.1 Headline Data

175 formal enquiries taken in the period from 136 couples and 39 single applicants.

132 Initial visits undertaken to 108 couples and 24 single people.

12 Viabilities undertaken with foster carers and sibling adopters.

87 new applications (Registration of Interest's) taken.

26 Stage 1's ongoing at 31.03.24

17 Stage 2's ongoing at 31.03.24

58 new families approved as adopters (43% offering FfA).

37 further assessments closed pre-approval (27 stage 1 assessments, 10 stage 2 assessments).

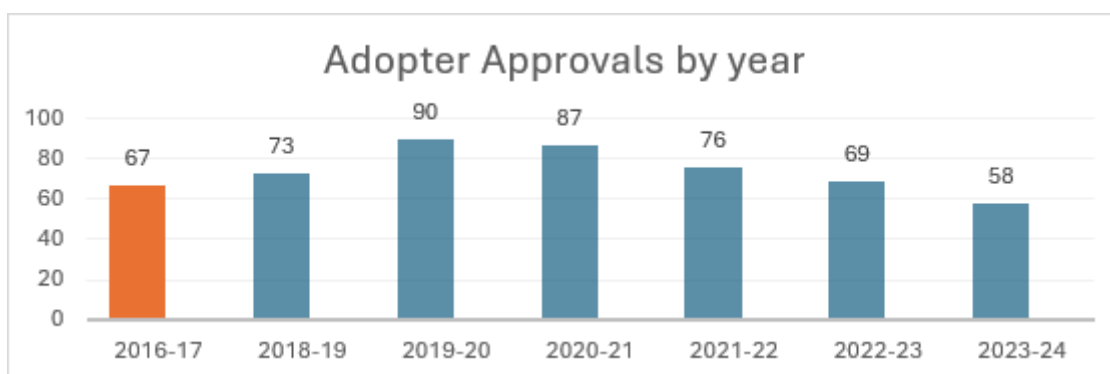
57 active pre order support cases – families with children placed.

45 approved and waiting families being supported at 31.3.24 – 19 actively progressing with matches, 3 on hold and 23 available (includes **10** South East Asian families, **10** WB families, 1 White British and European couple, 1 White Irish and British Pakistani couple and 1 White British and White British/Black Caribbean couple).

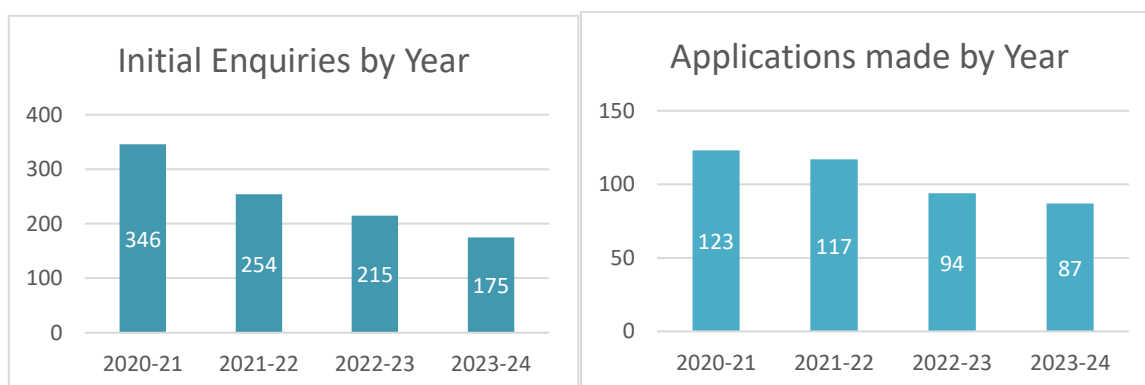
13 singleton children placed with new FfA Adoption Now families.

3.2 Analysis

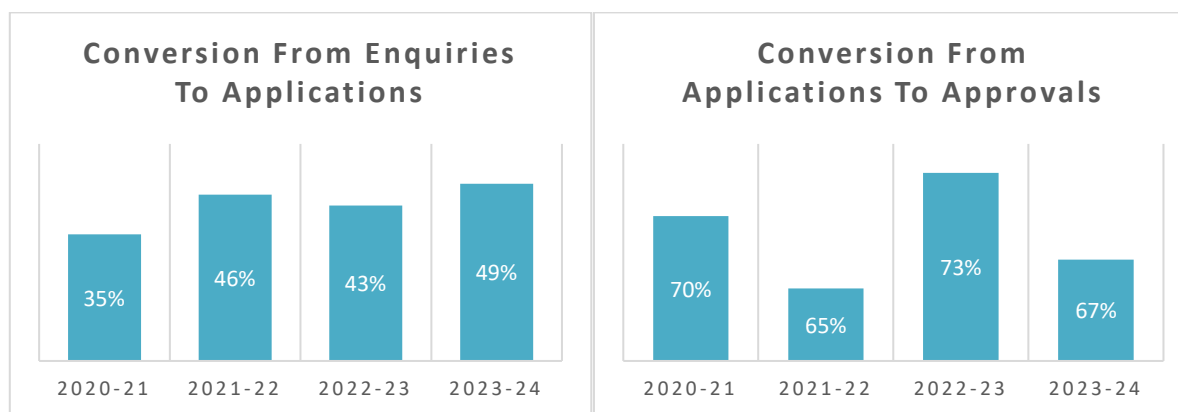
An annual target of approving 100 adopters each year was set by the Board in 2019, however this has never been achieved, with adopter approvals falling year on year locally and nationally since that year. Approval outcomes this year are the lowest since Adoption Now formed in 2017, with an impactful **16%** decrease in approvals this year from 22/23. This is the first year that the number of approvals has dropped below the level achieved by the six individual Local Authorities in the year prior to Adoption Now going live.



The number of formal enquiries received has shown a similar trajectory with falling numbers over the past four years, as has the number of applications made to the Agency.



However, the percentage conversion rate from enquiry to application is at its highest over those four years at 49% up from 35% in 2020/21.



The conversion rate from applications to approved adopters is hard to calculate accurately as many prospective adopters will apply in one year but not reach approval until the following financial year; however, a rough calculation based on the number of applications and approvals in each year shows that the conversion rate has fluctuated, but evidences that on average just under 70% of applications progress to approval. Whilst a very small percentage of assessments are presented to the Panel and Agency Decision Maker but are not approved (none in this last reporting period), it is clear that there is a high level of fall out between the point of application and the end of Stage 2 assessment. The loss of families during the process does not however appear to be increasing year on year. Notably, withdrawal during the adoption process means that significant work has already been completed, and in some cases full assessments written. In this financial year, **27** applications closed at stage 1 after considerable work being expended and **10** in stage 2.

As recorded in previous reports, the cost-of-living crisis is felt to be a contributor to the reduction in enquiries and overall reduction in adopters, as supported by research from Adoption UK: [Adoption Cost of Living Crisis AUK](#). Whilst it is difficult to provide an evidence base regarding impact on numbers of people making their first contact with the agency, data collated in respect of withdrawals from the agency post application but pre-approval highlights that in **14** of the **37** case closures, financial stability was a factor. This year finances are a contributor in **38%** of applications to the agency not progressing to approval within the year. However, it is important to note that in all those cases there were also other contributing factors. In situations where finances alone constitute a barrier, the agency works with families to establish a way forward wherever possible (whether this is being clear in assessment where a means tested allowance would be needed or in helping families navigate the benefits system or encouraging an increase in savings during assessment or during a break between stage 1 and 2).

In summarising the additional reasons for withdrawals outside of finances, out of the 37 closures, factors for lack of progression included: **3** families had limited support networks, **8** families were impacted by mental health / medical health concerns, **5** families had challenges with home circumstances and providing stability, **2** experienced significant bereavement or family illness, **9** families withheld significant information compromising trust and honesty with the agency, **3** decided to pursue fertility treatment and **1** became unexpectedly pregnant, **1** had a change in job role and wanted to pursue study, **1** was made redundant, **1** family did not engage after application and **3** had a change of heart around adoption (one of these being returning adopters who could not work within modern adoption).

In most cases withdrawals have been for multifaceted reasons and a combination of the above. **22** of the **37** closures were led by the applicants themselves. **15** cases closed due to applicants withdrawing on advice from the agency. In all such cases applicants are advised of any next steps they can take to enable them to be in the best position should they choose to reapply in the future.

An additional factor impacting adopter approval outcomes is that the agency did not actively recruit Asian families for quite a proportion of the year due to the large numbers already approved and waiting. Since

taking enquiries again this has been restricted to Asian families living in the geography of the RAA and particularly those who appear to have a very open offer in terms of age, needs and ethnicity of children.

The majority of local RAA's (including our neighbouring RAA which has a much more affluent demographic) are reporting their lowest figures too. Nonetheless, Adoption Now with **58** adopter approvals continues to hold its second place regional amongst the RAA's, with the highest approving **71** adopters this year and the lowest **18**. The drop in adopter approvals is also in line with the national picture both in the previous and the current year, which saw an overall drop (**12%**) in adopter approvals (Coram-i Quarterly Data Collections) based on the first 3 Quarters in 2023-24 compared to the same period in the previous year, as evidenced below. (Confirmed Quarter 4 data is not yet available.)



Within this national scene also the Agency has shown consistency with Adoption Now approving **2.65%** of all adopters approved nationally in 2023/24, down slightly from last year (2.89%) but remaining up from the previous two years (2.54% and 2.21% respectively).

Predicted adopter approvals 2024/2025:

6 adopter approvals are anticipated in Q1.

28 families are anticipated Q2, although given the complexities it remains a little early to predict with accuracy. If achieved this would be a significant increase on last year (**11** adopter approvals).

12 families are currently have potential to be presented to panel in Q3. Last year **19** adopter approvals were achieved in this quarter, but it is too soon to be able to provide meaningful comparison.

In recent years we have seen an upturn in adopter approvals in Q3 and Q4 due to assessments that have been 'stuck' coming through later than anticipated. It is positive that this upturn looks likely in Q2. However, in previous years the agency has had a healthier number of enquiries that usually move through the system within the year.

In the main, for adopters to be approved in the coming financial year applications must be received by the end of Quarter 2 (30th September 2024) and it is clear that a minimum of **37** applications will be needed during this period to match this year's approval rate given the average fall out rate post application and pre-approval.

The Agency however would aspire to exceed the number of approvals achieved this year in line with the clear need both locally and nationally.

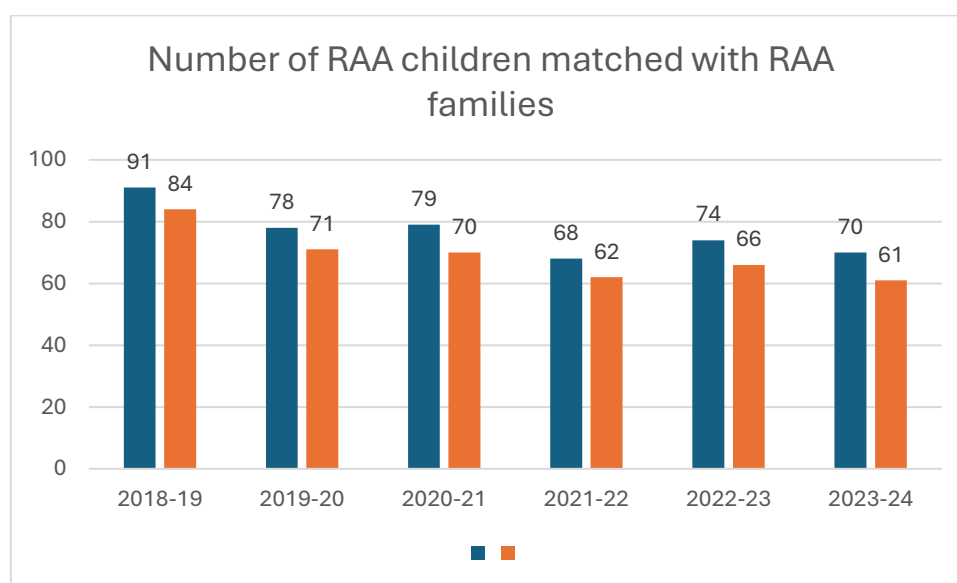
Adoption Now's Recruitment Strategy aims to 'claim' as many available families as possible.

Plans are in place to target those have previously adopted, sections of the public who may be more likely to respond altruistically to children waiting and the current decline in adopter numbers, and single males who are currently under-represented.

3.3 Matches

In this full year **95** children from across the 6 Local Authorities were matched with **82** families. (1x 3, 11 x 2 and 70 x1)

70 of those 95 children were matched with **61** RAA families (52 singleton placements, 9 placements of 2 children). This equates to **74%** of all the children matched (up 24% on last year).

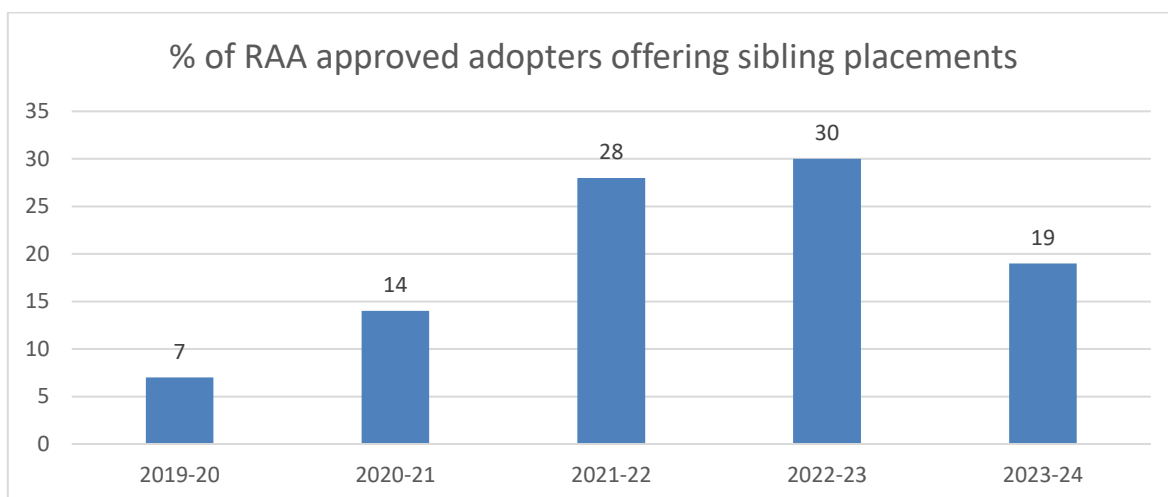


3.4 Matching factors

The challenge to recruit sufficient adopters willing to consider siblings placed together, children 3 years plus, those with additional needs or those placed under early permanence remains a priority locally and nationally. Whilst not a legal requirement, the ability to match children on the basis of their ethnicity remains an important consideration as is the need therefore to recruit from a broad demographic that reflects the backgrounds of Adoption Now's children.

Age of children: Of the 58 families approved **19 (33%)** were willing to consider children 3 years or older.

Siblings: In this year **11** families were approved to adopt siblings. This is **19%** of all approved families. (Down from 21 (**30%**) last year). This is a disappointing downturn from what has been a significant uphill trend since 20/21. The service continues to promote stretch to families where appropriate; the sibling training having been developed with the purpose of encouraging this. Whilst this may be as a result of the cost-of-living crisis or the increased numbers of singleton children available on Link Maker, this cannot be assumed and any barriers to applicants considering siblings will need to be a focus of the recruitment strategy for the forthcoming year.

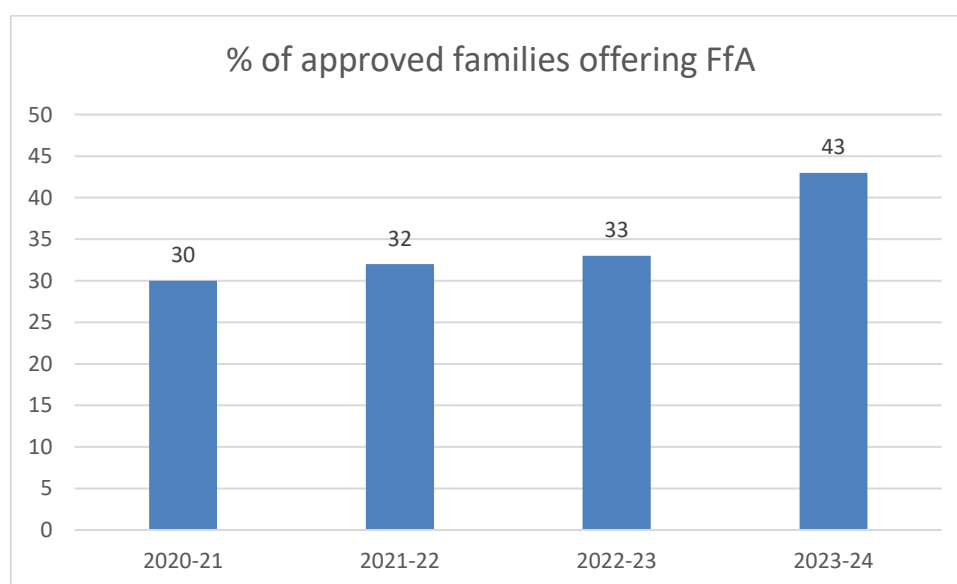


Single/LGBTQ+: Of the **58** families approved in the agency, there were **9** single applicants (**15%**), an increase on last year (**11%**) and **11** LGBTQ+ couples (**19%**), a decrease on last year (**24%**). The focus this year needs to be on increasing the number of LGBTQ+ applicants and understanding the barriers to single males seeking to adopt as out of the **9** approvals of single applicants, **8** were female.

Early permanence: Prospective adopters are advised about early permanence options with a focus on recruitment for Fostering for Adoption (FfA) from first enquiry onwards.

All adopters now attend a mandatory full day of Early Permanence training in addition to the 3-day adopter preparation groups that are delivered in person. This is particularly relevant in the drive to encourage consideration of Early Permanence for older children.

In this period, **25 (43%)** of the **58** approved families offered FfA placements (compared with **33% 22/23** and **32% 21/22**). The number of families considering early permanence has continued to rise year on year and is testament to the quality of training offered. A challenge for the agency is managing resource, whilst there has been an increase in the Early Permanence offer, some families are being used in traditional adoptions due to sufficiency challenges.



Ethnicity of adopters: In this year the service has seen less diversity with **8%** of approved adopters being other than White British (down from **25%** last year); **3** families of Southeast Asian heritage, **1** family of Polish heritage and **1** family WB / Black Caribbean. There continues to be a focus on recruiting Black families as

there is a recognised local and national need. This will continue to form part of the forthcoming recruitment strategy. South East Asian children continue to be under-represented in the care system and very few Asian children are awaiting adoption. Notwithstanding this, some of the Agency's longstanding families have been matched both internally and externally in **23/24**. As of 31st March 2024 there are **10** families of South East Asian heritage approved and waiting for a match. One of these families is also open and can realistically consider children of South Asian/White British or South Asian/Black African/Black Caribbean heritage.

Those waiting are offering placements for early permanence, siblings and older children; many are willing to consider children of a different ethnicity or religion to their own. Despite the success of achieving matches for some of this cohort of families, there are still some who have waited two to three years and over.

At this time therefore it is only possible to progress applications from families of South East Asian ethnicity who are able to meet the needs of children waiting, namely those with significant complexity or larger sibling groups (3+) or where there is an openness and capacity to consider children waiting of a different ethnicity or religion.

3.5 Quality assurance

Timeliness: Of the 58 approvals in the period **17** were fast track (no Stage 1 required). Of the remaining **41** assessments that necessitated a Stage one process **4 (10%)** were completed in the 61-day target timescale; down from **17%** last year. The majority are delayed by GP medicals however other applications are being delayed due to other non-medical issues. An increased scrutiny in assessments following learning from Serious Case Reviews, whilst absolutely necessary is also having an impact on timescales.

32 of the **58** Stage 2 assessments were completed in timescale (**55%**), which equates to the same percentage as last year. Efforts continue to try and increase the number of assessments that meet timescale despite the challenges of increased complexity.

Quality of reports to Panel: Of the **58** approvals in the period, **46 (79%)** of reports were judged good or excellent by adoption panel members. (Down from **90%** for the same period last year). The remaining **12 (21%)** were deemed to be satisfactory and fit for the purposes of decision making. There was however an increase in quality during the second half of the year as compared to the first half. Low numbers overall do contribute to the percentage values being more sensitive but the complexity of the assessments being completed increases along with the increased level of scrutiny has also had an effect. The established management team continues to quality assure all reports prior to submission for panel and support is provided to social workers throughout assessments to grapple with the increased complexities.

3.6 Adopter Recruitment /Marketing activity

Varying from past years, the marketing strategy now works on a quarterly rotation for **recruitment campaigns** with two recurring 'sets' of marketing activities and platforms. This provides the opportunity to be creative and plan effectively whilst also giving the flexibility to consider the Agency's needs that are identified by monthly internal tracking. Over the past 12 months two focussed campaign themes have been run;

- April – June – the #EveryStep campaign, focussed on 'Support' throughout the adoption process. Starting from the first call potential adopters make to the point of a child being placed and beyond.

This campaign utilised Adoption Now's social media platforms and podcasts to share the messages of support whilst also utilising advertisements in local magazines, banners in local authority areas and a door-to-door leaflet drop across all six local authorities. Local authority communications teams were

also engaged with campaigns, sharing them across their social media and internal platforms to gain a larger reach.

- July – September – the ‘I’m not too old’ campaign, focussed on ‘Our Children’. The campaign highlighted the need for adopters for older children (3 years+) challenging the idea that these children are ‘too old’ by focusing on their needs. The campaign highlighted how many “firsts” the children still had to go through and the importance of these moments, sharing them with families.

This campaign used creative and ‘thought-provoking’ messaging as well as outdoor advertisements on buses, billboards, and train station adverts. It also included a roadshow in shopping centres across the 6 Local Authorities utilising Adoption Now’s website, social media, and press to gain more coverage.

- October – December - ‘We need people like YOU’ Diversity Campaign - showed the diversity within our adopters and our children. Addressing topics such as age, adopters with additional needs, BAME (global majority) adopters, Cultural issues, Faith, Language, LGBTQIA+, Mental Health, Our Families and Single Adopters. It targeted the qualities needed in Adoption Now adopters. During this period, Christmas materials were also run in December to celebrate the festive season.

This campaign made use of Adoption Now’s social media platforms and targeted specific areas, groups, and magazines to encourage people of different ethnicities and faiths to come forward and talk to us.

- January to March - The ‘I became a parent when...’ campaign highlighted the positives that come with becoming or growing a family through adoption. Giving a chance for adoptive parents to share their personal stories about when they felt like Mummy’, ‘Daddy’, ‘Papa’, ‘Mama’, ‘Mum’ or ‘Dad’ for the first time! The warm, fuzzy, funny, and interesting moments that made their family,

This campaign utilised an emotive digital radio campaign to get people thinking about what it is like to start their own family. Outdoor advertisements on buses, billboards and train station adverts encouraged people to talk to Adoption Now and start their journey. Social media and Adoption Now’s Podcast where also utilised to support the key messages of the campaign.

4. Adoption Support

4.1 Headline Data

488 active adoption support cases – **15.3%** increase in 2023/24.

209 referrals for adoption support in 2023/24 – **95.5%** increase in 2023/24.

391 applications to the ASGSF – **21%** increase in 2023/24.

£1,170,232.59 claimed from the ASGSF – **26%** increase in 2023/24.

94 assessments of adoption support needs completed – **26.5%** drop in 2023/24.

110 new requests to access adoption records – **20%** drop in 2023/24.

4.2 Adoption and Special Guardianship Support Fund (ASGSF)

The Adoption Support Fund (ASF) has now become the Adoption Support and Special Guardianship Fund (ASGSF) with a view to encouraging more Special Guardianship families to seek support and access the fund. This is a change in name only and has not changed the nature of the fund or Adoption Now's role or responsibilities relating to its use.

Preparation for auditing Adoption Now's 2023/24 use of the ASGSF commenced in January 2024 and will be finalised by 31st July 2024 with the submission of the Annual Assurance Statement. There continues to be much confusion experienced by providers in relation to year end, particularly where funds have not been used by 31st March and therapy provision needs to continue into the next financial year. Additionally, there are a significant number of final invoices outstanding for therapy provision provided up to 31st March 2024 – therefore, the monitoring and auditing process continues to be very time consuming.

In December 2023 the ASGSF introduced Outcome Measures – the requirement being that the therapist must select one of 5 outcome measurement tools (STQ's, Thinking About Your Child etc) and complete a baseline assessment and repeat this at the end of an intervention. The scores from these assessments must then be inputted onto the ASGSF portal and are required 2 weeks after the start of an intervention and 2 weeks after the end of an intervention. This is still a very new system which is not yet embedded with providers and currently requires a lot of chasing to receive the scores, with several issues and errors being raised with the ASGSF User Group. The purpose however is to receive better feedback from adopters and adopted children regarding the value of the interventions provided.

The ASGSF continues to be an ever-growing area of work as a result of the increasing requirements when making applications, monitoring and auditing as well as the general increase in the volume of applications and children requiring ASGSF funded support.

Total monies claimed 01/04/2023 – 31/03/2024	£ 1,170,232.59
Number of children currently receiving therapy funded via ASGSF	334
Post order applications (by Child)	294
Pre order applications (by Child)	28
Number of applications made to the ASGSF	391
Post order applications (by ASGSF application)	367
Pre order applications (by ASGSF application)	22
Number of Group applications made to the ASGFF	2 – for 12 children
Post order – by child	9
Pre order – by child	3

The above data is based on applications and claims and does not yet include the funds that have been surrendered or returned. The final figures detailing the actual spend from the funds claimed will be finalised in July.

£968,227.23 was claimed by the mid-year point and was significantly higher than at any previous mid-year or year end point - this was £644,931.43 at mid-year 2022/23 and exceeded the overall total amount claimed in 2022/23, which was £930,750.63. Whilst this significant increase was observed at mid-year, applications appear to have slowed down towards the latter end of the year. What was evident at mid-year was that much of the surrendered funds from 2022/23 were re-claimed immediately from 2023/24 funds which, together with applications for continuing provision, is likely to account for some of the significant increase in funds already claimed earlier in the year. It will be interesting to see whether a pattern develops in the next financial year due to needing to reclaim unspent funds from one financial year in the next financial year.

Whilst the total amount claimed in 2023/24 (£1170,232.59) exceeds the total amount claimed in 2022/23 (£930,750.23), the overall annual increase is slightly less at **£239,481.96** in comparison to the annual increase in 2022/23 at just over £246,000.

As seen in 2022/23, the number of applications and numbers of children receiving support via ASGSF have also continued to increase significantly, with **391** applications for **334** children at this financial year compared to 323 applications for 291 children last year.

In this period Adoption Now has made 2 group applications and 9 child/ren applications to the Adoption Support Fund for packages of support provided by Adoption Now. These applications have been for the in-house Therapeutic Parenting Course, RAMP (Reducing Anxiety Management Programme) and Early Support Packages. After expenses (venue hire etc) these have generated the following income for the agency:

Adoption Now Intervention

Therapeutic Parenting Course

RAMP

Early Support Package

2	
2	
7	
£29,629.40	

Match Funding is required when a package of support required within the year goes beyond the fair access limit of £5000 per child. The Agency then funds half the additional work whilst the ASGSF funds the other half. The Agency refers to Adoption Now in post adoption order cases and refers to the placing LA in pre-adoption order cases. The figures below represent an increase in just under £1,000 in comparison to match funding paid in the last financial year.

Total monies paid for Match Funded Applications – 01/04/2023 – 31/03/2024

Local Authority Breakdown:

BwD

Tameside

Bolton

Oldham

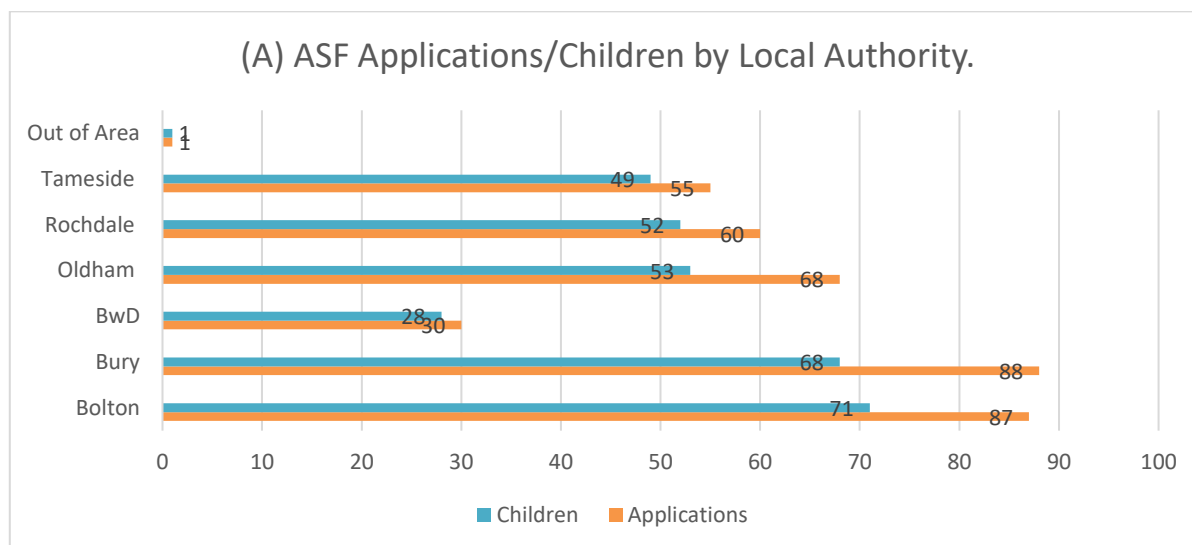
Rochdale

Bury

Number of applications/children

£8351.19
£0
£3,436.00
£2,844.24 (£759 paid by Bolton/Pre order)
£466.25
£1,604.00
£0
11 for 14 children.

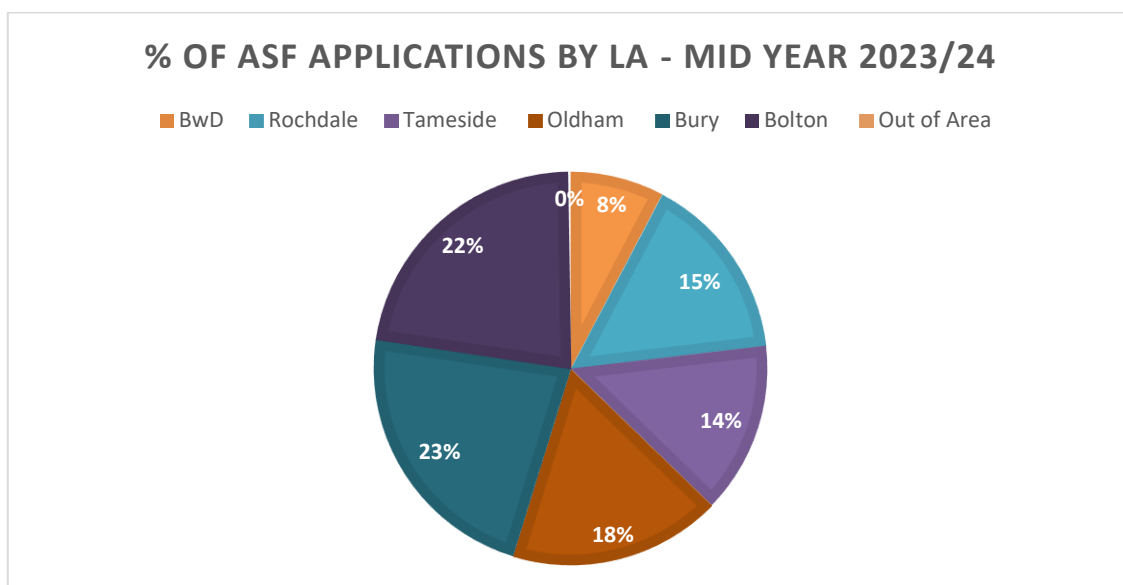
Local Authority Breakdown of LA ASF Applications/Children



The illustrations above and below show a consistent pattern seen in previous years in terms of ASF applications by Local Authority. Whilst the numbers are increasing across all 6 Local Authorities, the following have seen more significant rises - Blackburn with Darwen has seen a **55%** increase, Rochdale a **57.5%** increase and Oldham a **23%** increase. Bury continues to be the highest user of ASF with Blackburn with Darwen the lowest, although Bolton has just one less application than Bury but with a slightly greater number of children.

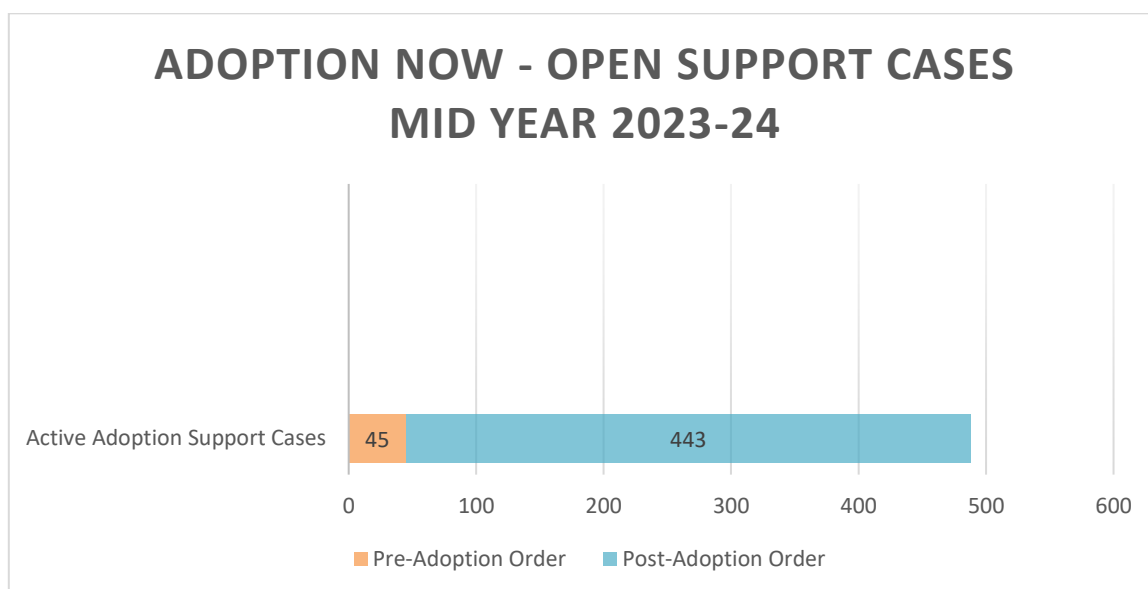
Perhaps this could see the start of a shift for Bury as the greatest user within Adoption Now. Bury have historically been adopter rich and had children placed from across the nation – many of which have been complex sibling groups and have required considerable and intense adoption support packages via ASGSF. It will be interesting to see whether the gap between Bury and the other Local Authorities continues to close: that said, requests from families living in Bury who have been approved by a voluntary agency, had children placed from outside of our RAA and not accessed support previously remain a frequent occurrence.

The one out of area application/child relates to a family who live in the Adoption Counts region where a parent works for that agency and an arrangement is in place for Adoption Now to provide support. This arrangement is reciprocal.



4.3 Adoption Support Cases/Workload:

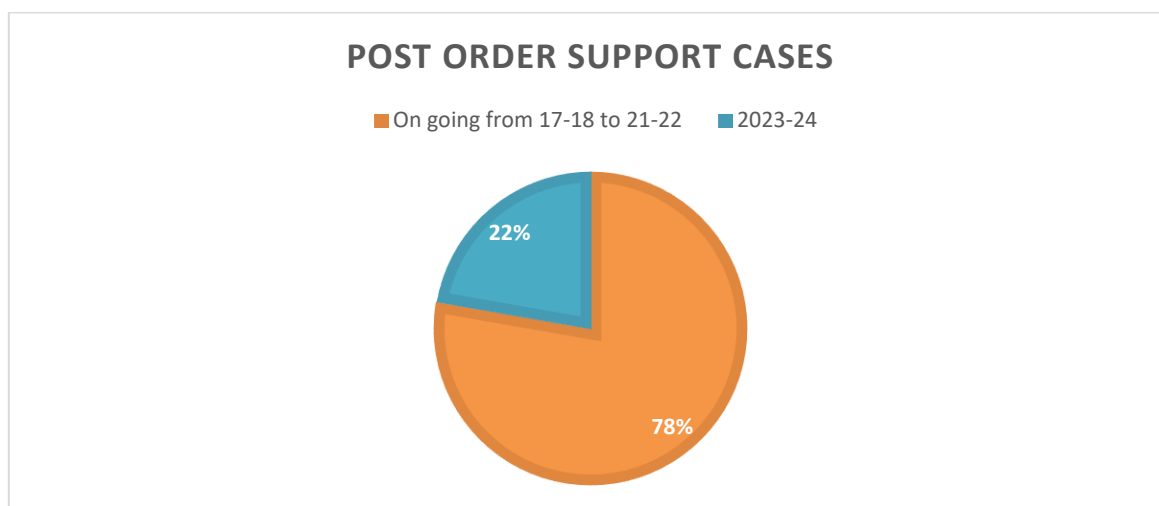
The service continues to record and report on the pre and post order support data separately.



The current open case total is **488** – this total reflects the number of children receiving adoption support, both pre and post adoption order. There is an overall increase in workload/active cases, from 423 at year end 2022-23 to 488 in this period. Whilst this may seem to be a steady increase year on year (2021/22 – 370, 2022/23 – 423 and 2023/24 – 488), there continues to be a consistent high volume of referrals being received each week.

As was seen at mid-year, there has been a further decrease in pre-order cases, from 72 in 2022/23 to **45** at this year-end period. Post order cases have seen a more significant increase from 351 to 443, rising from **392** since this mid-year.

Post-order support: The number of open post-order cases is **443**, which is made up of **167** referrals open in this mid-year review period and **276** ongoing cases as illustrated below:



The above chart illustrates the make-up of the post order active cases with a slight rise in the number of new referrals received in this period from 160 last year. Whilst those ongoing from previous years had decreased at year end 2022/23 to 191, this has now increased to 276 and is reflective of the high volume of referrals being received as well as the complexity of the cases being supported.

The areas of work that have seen growth this last year are Section 62 requests (requests from therapists and social workers to view files of children that have been placed outside of Adoption Now and are receiving adoption support services) and requests for adoption support from young people aged 18 and above. It is probable that other RAA's and Adoption Agencies will also be seeing increasing numbers of adoption support requests as well as increased usage of the ASGSF, which will account for the increased need to access such information. Technically, these are access to records/information requests, however, Adoption Now's LCS database system currently only allows an Access to Records pathway to be created for an adult and as S62 requests only apply to children under 18 years, these are recorded on the system within an Adoption Support pathway and are included in the adoption support data.

There has been a cluster of requests for adoption support from young people aged 18 plus. Whilst the Agency has always supported young people beyond 18, these cases have been quite sporadic previously. In some of these cases support is being provided for both adoption support and access to records. Whilst it is very positive that this area of work is evolving, that young adults are actively seeking and wanting support; this is raising new challenges and changes for the agency in terms of processes and systems. Again, there are limitations evident in the database and work is being completed to try to resolve these.

Processes are also constantly being updated and amended as a result of new types of requests in relation to post commencement adoption records. Further challenges involve navigating working relationships with the young adults and their adoptive parents, with the focus more on working directly with the young adult whilst building/maintaining relationships with all involved. It is difficult to know why referrals from over 18's are increasing at this stage – the Adoption Barometer and Adoption UK have been advocating for adoption support services to be available post 18 years for the last 3 years at least, together with the ASGSF publishing more widely the criteria, which includes young people up to and including 21 years of age. It is therefore likely that the combination of these will be having some impact on the increasing number of young adults seeking adoption support as they become aware of the offer, however this will be monitored further through 2024/25.

Assessments: The number of completed assessments of adoption support need are lower than at the same point in 2022-23, from 119 to **94**.

Active assessments have seen a slight increase, with **43** compared with 32 at this same period last year. **8** families have withdrawn from the assessment before completion.

Assessments:

01/04/2023 – 31/03/2024

Completed Assessments

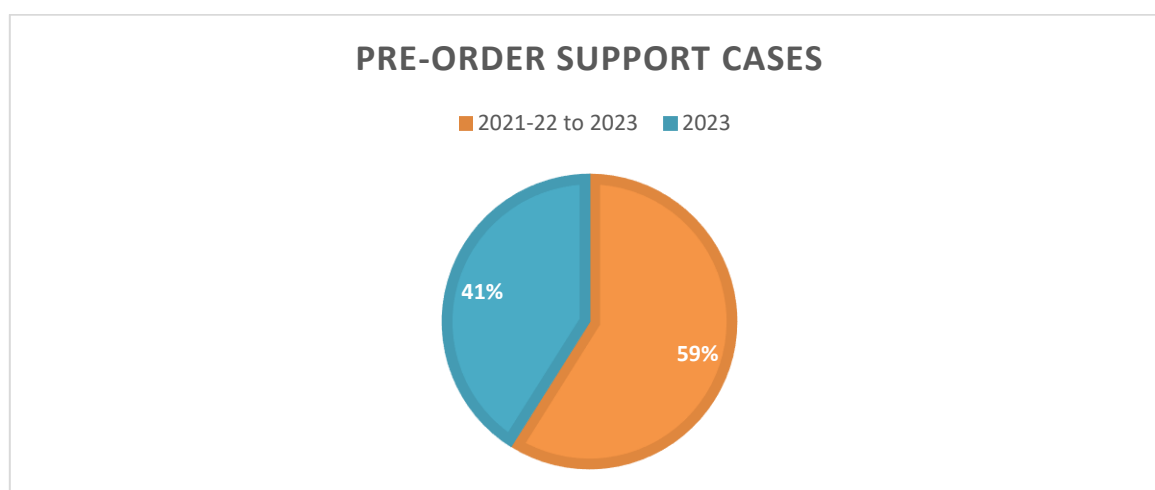
Active Assessments

Withdrew at Assessment

Completed Assessments	94
Active Assessments	43
Withdrew at Assessment	8

Pre-order Support: The number of open pre-order cases is **45**, which is a decrease compared with year end 2022/23 where the agency had 72 open pre-order cases.

This total reflects the number of children receiving adoption support pre-adoption order. This could be allocated with direct support from within the team, ASGSF commissioned support packages or tracking through early placement with regular consultation reviews. This pre-order support continues to show that needs are being identified sooner and appropriate support is being given at an earlier stage.



Adoption Support Consultations:

01/04/2023 – 30/09/2023

Adoption Support Consultations:

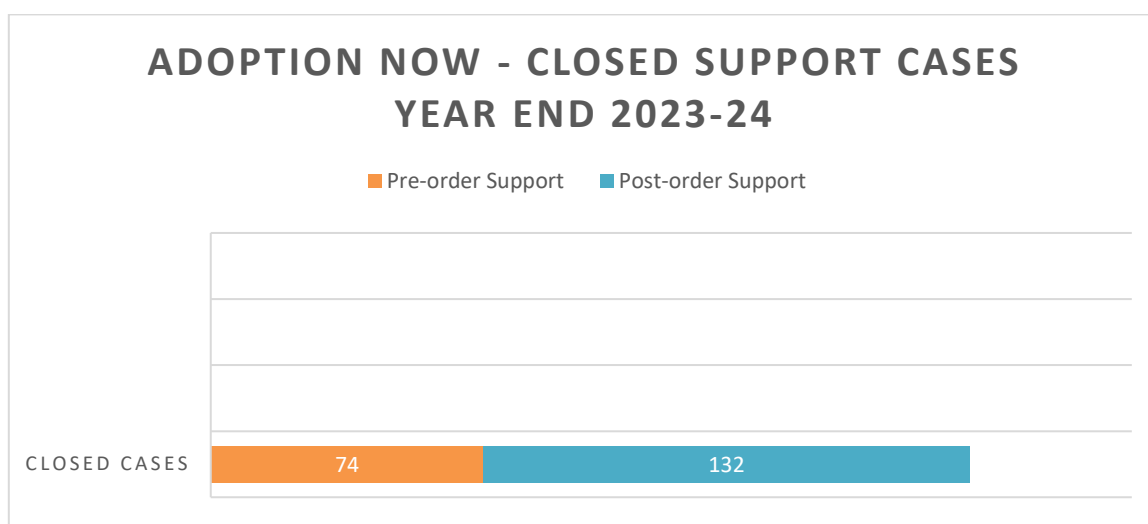
NFA following consultation:

Receiving on-going Adoption Support

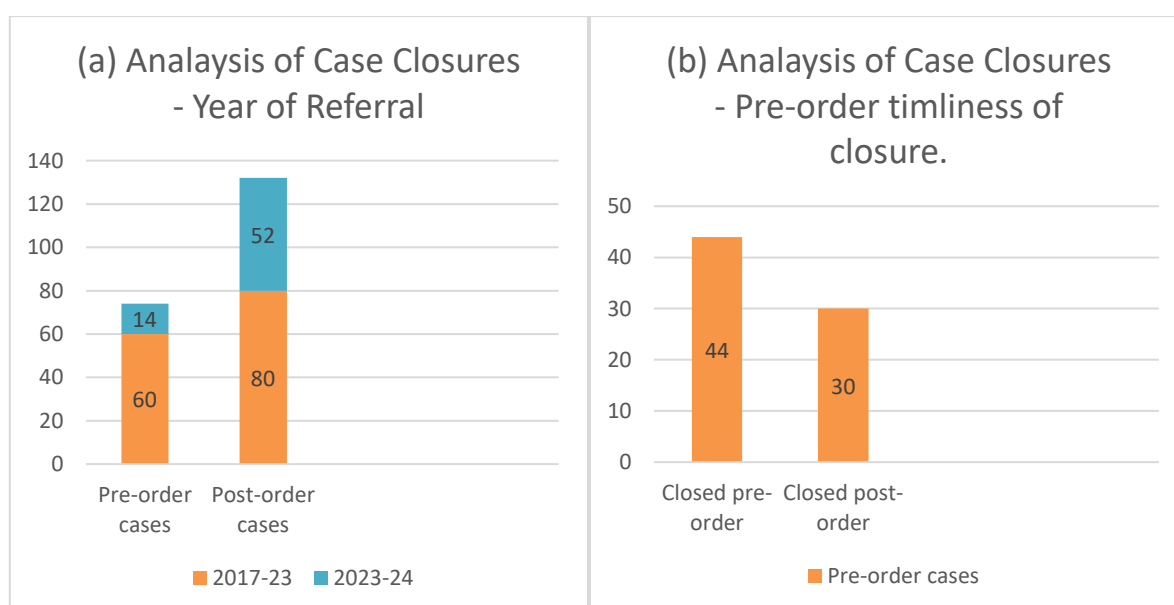
Closed at Adoption Order

Adoption Support Consultations:	103 (for 126 children)
NFA following consultation:	46
Receiving on-going Adoption Support	45
Closed at Adoption Order	74 (21 remain open post order)

There has been a drop in the number of initial adoption support consultations held this year, with 103 compared with 156 held during last year. However, the number of children is very similar with 128 last year and 126 this year. Early support packages are being provided more frequently and commencing at the start of placement either by the support team or commissioned with local adoption support providers.



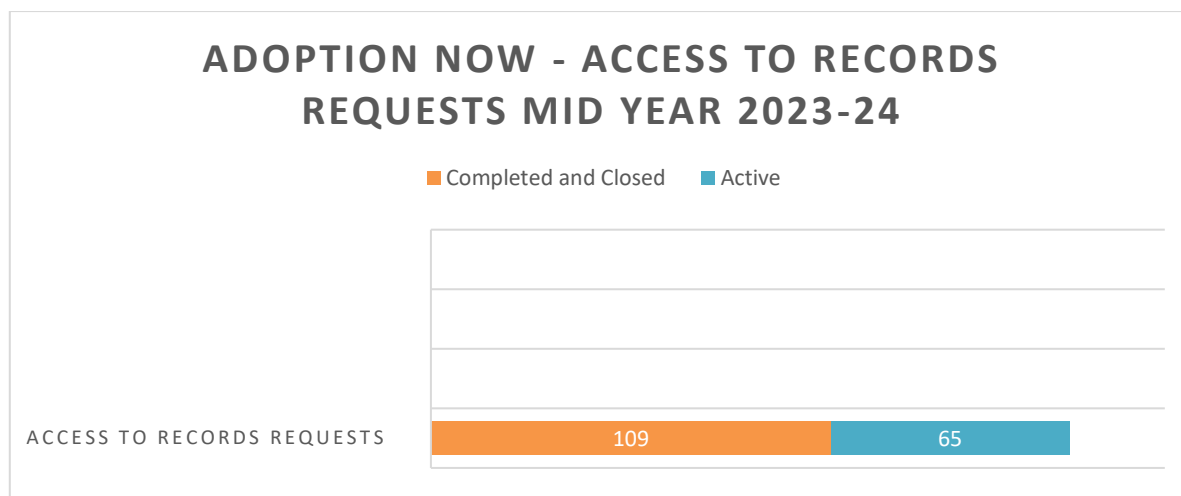
Case closures during 2023/24 are slightly lower at **206**, compared with 216 in 2022-23. As was evident at mid-year, pre-order case closures have continued to increase more than in any previous years and may account for the decrease in pre-order cases currently active.



Further analysis of the case closures in chart (a) shows that **52** post order referrals received in 2023/24 were closed within the same year. Consider this with the **167** post order cases that remain open from 2023/24 then Adoption Now have received **219** referrals resulting in adoption support services being provided throughout 2023/24 – which is a 95.5% increase from 2022/23 with 112 referrals. Chart (b) illustrates that **44** cases receiving adoption support no longer required active support prior to the Adoption Order and **30** closed following the order being granted. **21** of these 30 have remained open post order. It is imperative with so many new referrals that cases are closed when possible and it also indicates that interventions are succeeding in supporting families to the point that they no longer need active interventions. Some families will need help at different stages in their adoption journey and cases can be opened again as and when required.

4.4 Access to Records

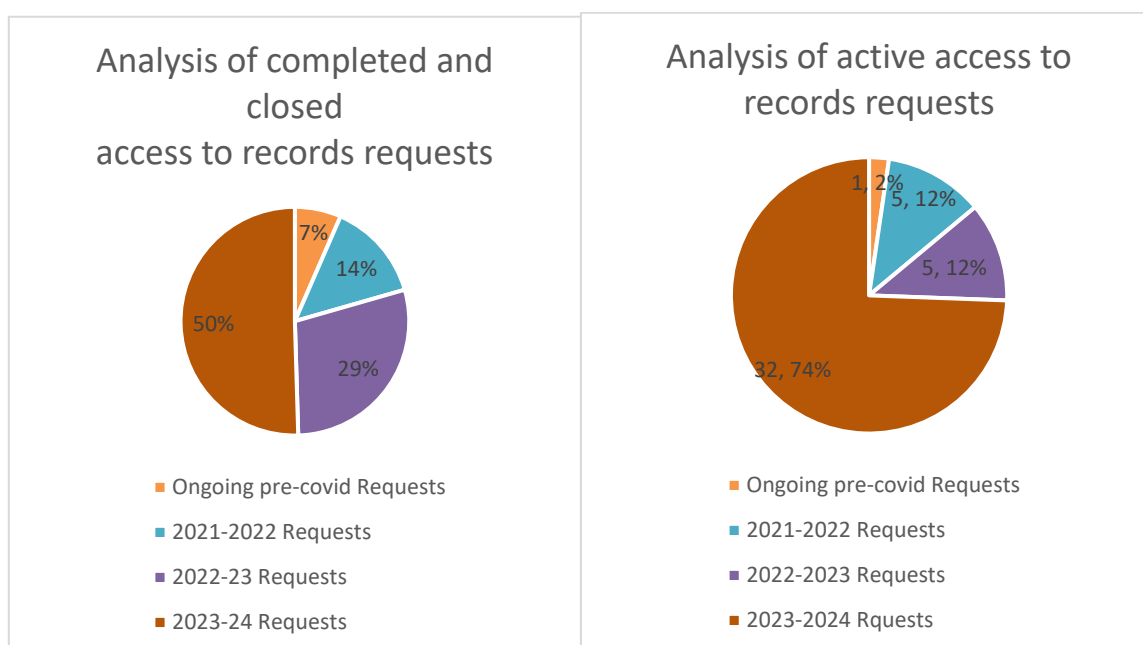
As reported in the previous annual reviews, this area of work was significantly impacted upon due to the pandemic and a recovery plan to clear the work waiting had commenced towards the end of 2020/21. The backlog from the pandemic period has now been cleared except for one case from 2018/19 where a request for the court records cannot be completed due to asbestosis in the Manchester Court building and is outside of the agency's control.



As can be seen above, **109** access to records have been completed and closed within 2023/24, with **65** remaining active.

109 access to records requests have been completed in 2023/24 – 56 of these are referrals received in 2023/24 and 53 from previous years. Taking into consideration the 56 completed within the same referral year, together with the 54 referrals from 2023/24 that remain active, **110** new access to records requests were received in this annual period.

The charts below illustrate in more detail the referrals received by year and show very few cases waiting where referrals were received prior to 2023/24.



Of the five cases remaining from 2021/22 one remains open due to Asbestosis in the Court building as above. Three are expected to be ready for closure early in the new financial year. One has been waiting for records from another RAA, which have now since arrived.

Of the five cases remaining from 2022/23 in four cases summaries are awaited from other agencies. In the fifth case the responsible RAA has yet to respond as to whether they hold the records.

In some instances, the wait for summaries from other agencies can be 12 to 24 months and has been a similar pattern for several years.

4.5 Contact and Letterbox Service:

The transfer of the letterbox service from the six local authorities is now complete with almost 1500 active letterbox exchanges/files transferring to Adoption Now. Definitive data continues to remain unavailable due to delays and errors in relation to the database system and the Letterbox Pathway. A temporary solution for this is being worked on by LCS and is anticipated in the coming year.

The workload is now increasing. As well as managing the day-to-day letterbox exchanges, queries and supporting birth relatives to write letterbox exchanges the contact co-ordinators each hold a caseload. These include supporting/supervising direct contact, supporting to establish direct contact, support to re-establish letterbox exchanges and supporting families where a birth relative has died (verifying cause of death/information to share with adopters, inheritance issues etc). More definitive data will provide further understanding and analysis as to the impact of the Modernising Contact agenda on contact arrangements coming through and on resource, therefore prioritising the database issues in the coming months will be crucial.

The co-ordinators have started to review the information leaflets and templates and are currently developing a process for Veto's (now known as Expression of Interest/ Expressed Wishes).

4.6 Quality Assurance:

Assessments of Adoption Support Needs: The audit of assessments completed in 2023/24 found that assessment reports are on the whole of good quality and are completed within a timely manner (Adoption Now follow the timescales for Single Assessments). Some have fallen outside of these timescales due to various reasons such as staff sickness/need to reallocate, parent led delay, delays in gathering information and delays in accessing historical information. Whilst all assessments completed are always purposeful, they are often very varied in terms of depth and detail which is dependent on the purpose/recommendation of the assessment. For example, where a specialist assessment is requested or a therapeutic service is needed more urgently an adoption support assessment maybe less detailed. Further work is needed within the management team and with the wider team to monitor timescales and record clear rationales for any delays.

Basic Information: An audit of basic information recorded on casefiles has commenced, focusing on essential information, ensuring consent, adoption order dates, ethnicity and disability are all recorded. There are significant gaps remaining across the system and work will continue into 2024/25.

Support Plans: The current integrated support plan on the LCS database is very brief and not fit for purpose. Work has started with the LCS team to create a more detailed and appropriate adoption support plan but is delayed as with other aspects of the adoption support LSC system developments.

Closures and Transfers: An audit of all active adoption support cases has recently been completed in March 2024. This has identified a number of cases needing to be prepared for transfer to another RAA due to the 3 year rule, needing closures finalising or are in need of a review due to inactivity. The purpose of this

audit is to prepare for new staff joining the team as well as informing the development of a case weighting model to be used across the adoption support service. This will continue into 2024/25.

5 Core Offer Support – Training, Workshops, Groups and Events

Pre-Approval training

This is delivered regularly throughout the year. In this review period the following have been delivered:

24 Information Events delivered online.

11 Adopter Preparation Groups delivered (each 3 days in person),

2 Returning Adopters/Foster Carer Preparation Groups presented (1day),

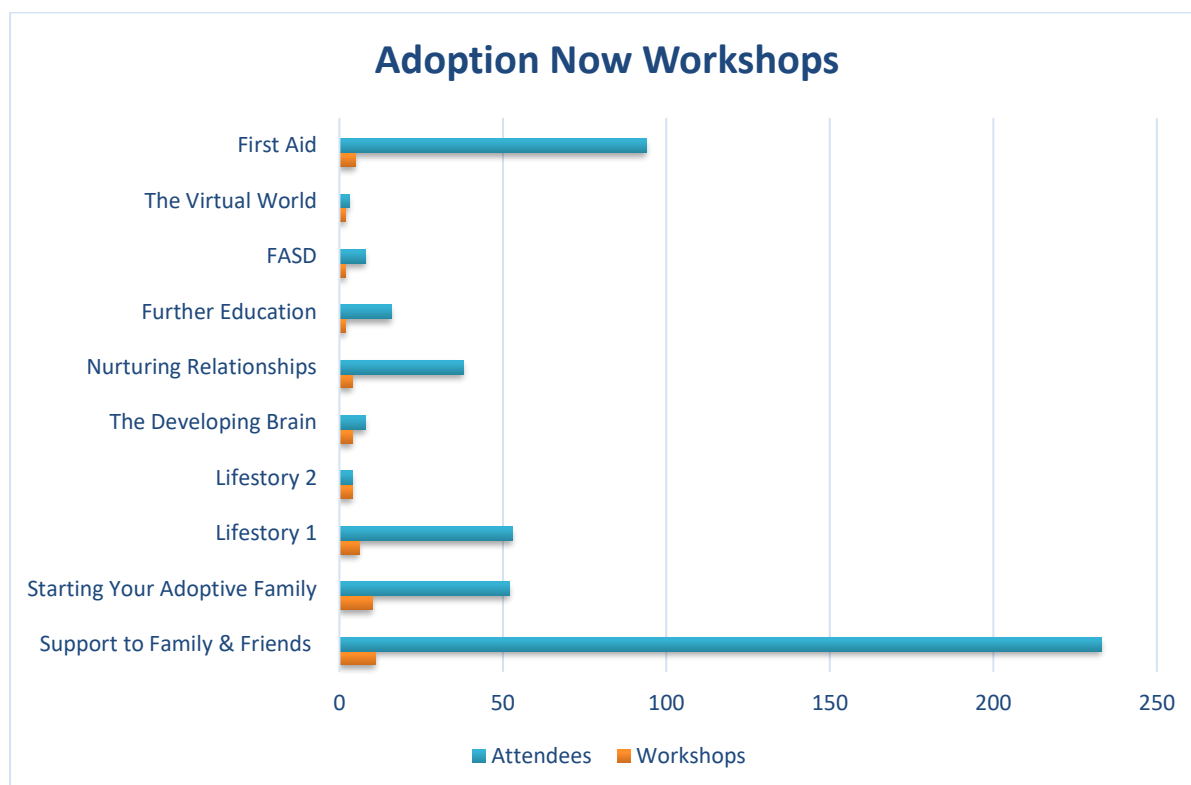
7 Considering FfA training courses (1 day),

6 Considering Siblings training courses (half day),

During 2023/24 Adoption Now has taken an active role in a North West project funded by Adoption England to encourage people to consider Early Permanence for older children. One of the successes of this project already has been the offer of a two-day **Therapeutic Parenting Course** specifically aimed at prospective adopters considering adopting children aged 4 years or older. The course has run six times during the year with **58** families being referred. As a result, 30 families have felt able to offer Early Permanence as an option for older children and 7 families have gone on to care for children through Early Permanence/Fostering for Adoption.

Workshops

These are mixed to offer both virtual and face-to-face options in some instances with The Virtual World running virtually as delivered PAN regionally and Support to Family Friends also running virtually to capture wider and distant family networks.



The table above shows the number of each workshop held over the annual period, together with the total number of attendees overall for each workshop. Support to Family and Friends continues to receive very high numbers of attendees and is one that continues to work particularly well online. A number of workshops were cancelled during the year including one on Foetal Alcohol Spectrum Disorder, 3 on The Developing Brain and 2 on Starting Your Adoptive Family.

Having piloted **Network Meetings** in the first half of this year, they are now used as a matter of course in relevant cases. These meetings involve gathering adopters and their support networks to consider the type and extent of support that can be offered from within this group. They can be used at a variety of points from within adopter assessments, through the matching process with children and after a child or children have joined a family. At times it is pertinent to hold more than one, particularly where a Network Meeting has been held during matching and there are then difficulties, either anticipated or otherwise, after the child or children join the family. It remains early days but it is hoped that these meetings will help to keep disruptions at a minimum even with the increased complexity of both children and families that is seen.

Support groups and Events

Single adopter group – Monthly virtual meeting.

FFA Support Groups- run regionally across North West RAAs.

Adopters of Children with Additional Needs – a new support group run regionally across the North West RAA's.

Nurture Group – runs twice monthly at 2 venues across the region.

Teen Group – runs monthly.

Summer Picnic 2023 – 38 families/49 children.

Winter Wonderland Party 2023 – 116 parents/ 107 children.

Easter Egg Hunt 2024 – 98 parents/90 children.

Mentor Support Groups – 1 in person and 1 virtual held every 3 months

Therapeutic parenting course - 2 x 5-Day Courses in this period = 13 families. As part of this intervention, Adoption Now has formed a regular call back/support group, which has run 6 times through

2023/24. This has been positively received and well attended with each group having new participants from the ongoing therapeutic parenting courses

Reaching Out

Adoption Now's bulletin/newsletter that is published to the mailing list quarterly with some additional special editions.

Feedback

Feedback is sought after every one-off event and regularly from groups that run throughout the year. It is largely very positive with the main request being for more support events and activities. Adopters within the Nurture Group have requested additional information and support around meeting the needs of relinquished children and this will be planned in the coming year. Young people and their parents in the Teens Group have requested more activities and meet ups and thought is being given as to how to meet this request. A selection of other feedback received is below:

It has helped others and myself. (14 year old adoptee – Teens Group)

It's helped me with socialising and making new friends (14 year old adoptee – Teens Group)

[The trainers] references to her own experiences made the information more relatable – you were learning content from a professional but also from a mum of an adoptive child – I could see her in her two roles. I liked her honesty; e.g. it will be tough and stressful, but it will also be the best decision you ever make.

6. Adoption Panels

Adoption panels continue to operate four times per month with an option to run a fifth panel if required. A bi-annual panel chairs report exists which summarises the work of the panels.

The panels quality assure paperwork being presented. For approvals the Prospective Adopter Report is scrutinised. When matches are considered, panel members scrutinise Adoption Permanence Reports which consider the needs of the child and how the adopters can meet these needs, Adoption Support Plans which look at any additional support needed to meet the needs of the child, and Child Permanence Reports which look at the needs of the child including the background of their family and parents and the reasons why adoption is the appropriate plan. Overall, 90% of the Adoption Permanence Reports and Adoption Support plans and 74% of the Child Permanence Reports presented to panel were rated good or excellent. There was just one report during this period that was rated as poor due to inconsistency in the verbal and written presentation. Panel deferred the item to await further information.

Feedback is sought from professionals and adopters who attend panel. In the main this has remained very positive with adopters making comments such as 'Amazing' and 'Not so daunting after all' and one social worker attending from another agency commented 'I found panel members were really welcoming and questions were clear and fair'. In terms of suggestions for improvements there were some differing views regarding the advantages of face to face over virtual but in the main all still found the experience to be positive. There was also a professional's request to be informed of delays on the day. Panel Chairs are mindful of the need to keep to time, but on occasions when this is not possible the Panel Advisor makes every effort to update those waiting.

7. Inter-country adoption

Inter-country adoption services are occasionally requested in Bury and the Local Authority has a statutory obligation to provide or commission a service. Bury commission this service from The Inter Country Adoption Centre.

8. Voice and Influence

Services being designed are in line with the expressed wishes of some of our young people who continue to be consulted to support service development. Creative ways continue to be used to encourage participation from children who access post adoption support as well as those children who are awaiting adoption, especially, but not exclusively, those who are verbal. The Teens Group has led to some more meaningful engagement/consultation but this remains an area for further development to ensure involvement from children, adopted adults, adopters and birth parents.

9. Complaints

Adoption Now has received two formal complaints within 2023/24.

The first was from Adoption Now adopters regarding concerns raised around unassessed risks posed by a relative within the adoptive family. The complaint was investigated by an Independent Investigator who did not uphold any part of the initial complaint.

The second was from adoptive parents in relation to a letterbox exchange facilitated by Adoption Now. This was investigated and responded to by the Adoption Support Team Manager. She upheld one point within the complaint and provided both an apology and resolution. On another point, whilst it was not upheld in terms of a complaint against the Agency, a resolution was proposed. There has been no further response from the complainants and therefore the matter is considered resolved.

There were no complaints received by the Local Authority in this period relating to adoption matters.

10. Allegations

There have been three allegations made against Adoption Now adopters. This is an unusually high number within one year. All three were entirely unrelated and had very different elements to them. There is no indication currently that this sudden increase indicates a new pattern which should cause concerns about overall practice, however this is being kept under review, and in one case, as detailed below, a Serious Case Review is looking at the learning that can be taken.

The first involved a Blackburn with Darwen child in the care of Adoption Now adopters and the outcome of the Section 47 enquiries following abnormal blood results was that the injury to the child was most likely of an accidental nature. The further health implications of the blood tests were followed up in relation to the child.

The second allegation relates to an Oldham child who sadly dies upon admission to hospital whilst in the care of Adoption Now adopters. This remains under investigation with no immediate outcome expected. A Serious Case Review has been started following an initial Rapid Review.

The third allegation relates to a Tameside child in the care of Adoption Now adopters. The allegation was substantiated, and a Risk and Support Plan was put in place. Overtime it was possible to gradually reduce this and the issues which led to the allegation were addressed.

11. Staffing

Adoption Now is made up of 80 seconded employees from across the six local authorities and 16 employees employed through Bolton directly to Adoption Now. These include a combination of part-time and full-time employees. The staff is organised into three main teams, those being Care Planning and Family Finding, Recruitment and Assessment (including Marketing and Welcome teams) and Adoption Support (including Contact Co-ordinators) with the addition of the Administrative team.

Working across the service, the following staff have been seconded from Bury throughout the financial year: 1 Team Manager (Recruitment and Assessment), 1.5 Advanced Practitioners (one part time in Care Planning and Family Finding and one full time in Recruitment and Assessment), 4.5 FTE Social Workers, 1 FTE Family Support Worker, an Administration Team Manager and a FTE Contact Co-ordinator. The Bury workers are split between Care Planning and Family Finding (1.5 FTE), Recruitment and Assessment (1 FTE) and Adoption Support (2 FTE) with the Family Support worker working across Recruitment and Assessment and Adoption Support. Agreement was also reached during this year for an additional 0.5 Social Worker within the Care Planning and Family Finding Team which currently remains vacant along with a full-time post.

12. Budget

All Adoption Support fund applications for adoptive families are dealt with by Adoption Now.

The operational budgets supporting adoption are transferred to Adoption Now at the beginning of each financial year and combined with the budgets from the other five local authorities. This budget has not been increased since the formation of Adoption Now (except for the addition of the Letter Box function) which has put ongoing pressure on some budget lines and in particular the staffing budget lines.

£1,108,610 Total Expenditure (excluding ring-fenced expenditure)

£903,615 Total Income (excluding ring-fenced income)

£204,994 Total Shortfall taken from Reserves

£361,979 Remaining Reserves at 31st March 2024

The shortfall was made up of £155,410 overspend and £49,584 shortfall in income in comparison to the budget. However, there are a number of costs each year which have not had a budget line from the outset. The largest of these is the operational costs paid to the host Local Authority totalling £116,218 for the year. The costs that do not currently have a budget line total £194,634 for the year evidencing that savings continue to be made in many areas within the budget to cover some of this shortfall. The reserves were built up due to savings made in the first few years of the Regional Adoption Agency and there was agreement to retain this in order to cover the known shortfall that would start to occur.

The Board of Directors is well apprised of the financial situation and plans to fully review the costs, spending and income of Adoption Now during the coming financial year in order to plan for 2025/26 when there will be insufficient funds within reserves to cover the ongoing shortfall.

A total of £87,890 was spent on placing Bury children with outside agencies during the year.

13. Service Development

The Agency recognises the importance of ongoing development and ensuring a staff resource that is skilled and experienced in all aspects of adoption and child protection. A variety of peer support, inhouse training and development initiatives alongside the use of external training courses is used to achieve this. A development plan exists within Adoption Now to ensure continuous improvements are made to the service. In addition, this is informed by adopter surveys carried out at least annually.

Key focusses for development over the past year have been in the areas of Maintaining Relationships within adoption and meeting the needs of Global Majority children and adopters. Leading on from a number of staff members attending a national conference looking at Maintaining Relationships in the first half of the year and the Panel Development Day which also had this focus, around a third of the staff attended a one day Safe and Meaningful Contact training course in March to help develop thinking around how to promote more meaningful relationships between adopted children and their birth families in a planned and assessed way. Work is being completed to look at how to use and implement the toolkit promoted during this training at all stages from pre-Placement Order through to post adoption, in order to develop more informed and structured plans for children.

In the second half of the year the Adoption Now management team took part by invitation in Inclusive Leadership training (the Just Heart, Just Home project) which was centrally funded. The workshops and presentations were a reminder that Black children are over-represented in the care system, wait longer for adoption and are the least likely to achieve stability. The course provided the space, time and confidence for participants to consider what this means for global majority children and adopters across the Adoption Now footprint. Adoption Now has also taken part in a pilot project (AFDiT) developing a toolkit to assist in considering the needs of children who are or may be placed transracially. This is due to be published and launched in the coming months and will then be further disseminated within the service.

For the past two years Adoption Now has commissioned a variety of online training from CVAA. Workers who attend these events are then tasked with feeding the learning into the wider teams so that the benefit is spread across the service.

Adoption Now runs regular training for foster carers from the six Local Authorities and any external foster carers who are caring for the Local Authority's children on Moving Children On, with a particular focus on the relationship-based model used by Adoption Now. In addition, training is provided to foster carers before each Adoption Fun Day to prepare them and help them to prepare and support the children attending.

Training on the writing of Child Permanence Reports is offered regularly by Adoption Now throughout the year to Local Authority Social Workers responsible for writing these as well as new workers within Adoption Now. New Early Permanence Champions were appointed earlier in the year. Due to a number of staff changes it has taken longer than anticipated to review the in-house process around Early Permanence but the Champions will shortly be ready to roll out workshops to Local Authorities on a regular basis.

This year Adoption Now has run a workshop on the Adoption and Special Guardianship Support Fund for Local Authority Special Guardianship services to support with growing numbers of SGO applications, monitoring and auditing, preparation of the annual assurance statement and sharing provider information. Additional support has been provided to the LA's as and when required.

Where there is opportunity for joint learning with counterparts regionally and nationally, these are regularly taken up particularly by the management team but also, as appropriate, by other workers within the service.

The revised forms used during the matching of children with adopted families are now embedded into the service and used with confidence and success. New National Matching Standards are anticipated early in the coming financial year and will be cross referenced with existing practice to ensure that all aspects are compliant.

The future of the Adoption Support Fund remains uncertain from one year to the next, therefore to ensure that therapeutic services can be provided in-house (which assists also with generating some income whilst the Adoption Support Fund exists), further investment has been made in skilling up staff within the Adoption Support Team in particular in the areas of Theraplay and DDP which are two of the most common therapies drawn upon with adoptive families.

14. Mentoring Service

16 Mentors

26 new referral in the second half of the year

36 Adopters open to recruitment and Assessment working with mentors at 31st March 2024

10 Adopters open to Adoption Support working with mentors at 31st March 2024

5 Families awaiting allocation to a mentor at 31st March 2024

The mentors are volunteers who support those coming through the process and in the early stages of match and having a child join their family, as well as a few families in need of adoption support. Wherever possible allocations are made to ensure greater understanding of the specific circumstances of the family, so of those waiting for allocation 3 are waiting for an Asian Muslim mentor to mirror their ethnicity, culture and religion (however they are currently approved and waiting with not identified match), one is awaiting a mentor who adopted on their own and one a mentor whose family is of mixed race. Mentors are recruited with the specific needs in mind to ensure that there is always diversity. There are currently 1.5 vacancies and during the period 3 mentors have had to resign due to changes in their circumstances/lack of time and 3 new mentors have started. Recruitment is ongoing as the right people come forward.

The feedback from those who have had the support of a mentor remains very positive with all who responded rated the service as very good or good. Adoption Now remains relatively unique across the North West in terms of this offer. Below is a small selection of the feedback received:

It has been extremely helpful not just for myself but my partner too as we are able to discuss issues and consider new ways of dealing with things.

It was an excellent way to learn about someone's experiences and the challenges they faced.

I think it helped us not be so hard on ourselves and be reassured that everyone is learning in this adoption process.

Katrina Williams
Head of Service
28th June 2024

This page is intentionally left blank



Classification: Open	Decision Type: Key
--------------------------------	------------------------------

Report to:	Cabinet	Date: 25 September 2024
Subject:	Procurement of LD2 smoke alarms in relation to FRA compliance works.	
Report of	Cabinet Member for Housing Services	

Summary

The purpose of this report is to seek formal approval of a contract award recommendation following completion of the competition exercise carried out through the Procure Plus framework, the Capital Programme was approved in July 2024 with FRA works being identified within the programme.

The regulator requires the stock to be upgraded in line with current regulations, Pennington Choices Limited carried out a full review of general needs and sheltered blocks which identified a range of works necessary to ensure compliance, the LD2 smoke detection upgrade works are within the scope to complete.

The works will be carried out to flats within the 270 blocks, owned and managed by Bury Council, the contract will be managed through Sustainability and Investment team.

Recommendation(s)

Cabinet is asked to:

1. Approve the award of a contract to the winning bidder AB Electrical and Building Ltd for the initial period to 31 March 2025 with the option to extend for a further 12 months until March 2026 at a value of £920,000.
2. Delegate finalisation of the terms of the contract to the Director of Law and Democratic Services in consultation with the Executive Director (Strategy & Transformation).

Reasons for recommendation(s)

Tenders were received from six contractors through the Procure Plus electrical framework, the tender was on a price and quality basis, it was procured through a mini competition. The winning bidder scored highest overall in the evaluation process. The evaluation of the tenders was carried out on a 70:30 price and quality/social value basis.

Corporate Procurement, (via STAR Procurement) has reviewed and is satisfied with the approach taken and the outcome.

Alternative options considered and rejected

1. **Do nothing:** Due to the nature of the works (compliance work as identified by the FRA reports), the works need to be completed to ensure Burys general needs stock is compliant with the current regulations.
2. **Deliver Inhouse:** The works were originally offered to the in house contractor but they were unable to deliver due to lack of capacity.
3. **Open Tender:** This option was considered and is possible, however this would involve significantly more time and costs in the procurement process as a whole and for no real benefit. The use of this framework is free and ensures that all suppliers have been evaluated and approved based on their capabilities, expertise, and compliance within required criteria along with pre-negotiated terms and conditions. Further competition exercise enabled the council to tailor the service requirements to the Council's specific needs. There is little or no benefits to going out to open tender over using this framework and as a result this option was dismissed.

Report Author and Contact Details:

Name: Neil Higson

Position: Home Improvement Manager

Department: Sustainability and Investment

E-mail: N.Higson@bury.gov.uk

Background

General needs flats and sheltered accommodation have been inspected by Pennington Choices Ltd (a nationwide surveying, consultancy and project management company) in 2023 as part of the block Fire Risk Assessment (FRA), a full report formulated from the initial observations and inspections.

Surveys internally have been carried out to identify the extent of works necessary to ensure Bury complies with current FRA recommendations and regulations, works carried out will bring the properties up to a more compliant standard and address key observations within the FRA reports.

Some properties included may be already fit for purpose, as works could have been carried out on Kitchen and Bathroom upgrades, rewires and voids, these will be omitted from the contract accordingly when identified, on a property pre inspection.

Links with the Corporate Priorities:

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

Improved Quality of Life: By its very nature this contract helps to ensure health and safety compliant to protect all council-owned buildings, users and visitors, by delivering early warning of fire within the properties.

2025 Vision and Aims - Connecting buildings & people to maximise performance and operational efficiency by transforming our building infrastructure into an integrated, rationalised, decarbonised health and safety compliant estate in support of Bury's 2030 'Lets-do-it' strategy. This contract works towards creating and maintaining a health and safety compliant property and blocks.

Equality Impact and Considerations:

The proposal does not bring about any changes that would impact on one protected characteristic over and above another, it does not result in increased/decrease access to services or provision for any group of the population or cause any disadvantage to a community of interest. The approach is to ensure value for money in procuring LD2 works through a proven framework for the council.

Environmental Impact and Considerations:

Contributes to ensuring a safe and compliant environment for all Council-controlled building users and visitors to sheltered and general needs flats by upgrading existing schemes internally to be compliant.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
As identified through the FRA surveys carried out by Pennington's the general needs block need upgrading to LD2 linked alarms within the flats to ensure early warnings to customers in the event of a fire.	<p>The council carried out a full survey of FRA works required in flats, works identified have continued to be delivered with the LD2 works to be part of the delivery to make the properties compliant for any inspection.</p> <p>Cabinet approval will enable the council to award the contract to address the needs.</p>

Legal Implications:

To be completed by the Council's Monitoring Officer.

1. Procure Plus provides a range of framework agreements that provide a cost-effective source of supply for social housing providers to purchase goods, works and services needed to build and maintain their housing stock, and the Procure Plus electrical framework provides a Public Contracts Regulations 2015 compliant procurement route to deliver these services. It is noted that a mini-competition as permitted under the terms of the framework has been utilised in this instance in order to select the successful bidder.
2. Use of the framework will determine the form of call off contract to be entered into with the successful bidder.

Financial Implications:

To be completed by the Council's Section 151 Officer.

3. The cost of the contract is included within the approved capital programme.

Appendices:

Please list any appended documents.

Background papers:

Please list any background documents to this report and include a hyperlink where possible.

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

Term	Meaning



Classification: Open	Decision Type: Non-Key
--------------------------------	----------------------------------

Report to:	Cabinet	Date: 25 September 2024
Subject:	2024/25 Corporate Plan - Six Month Update	
Report of	Cabinet Member, Finance and Transformation	

Summary

In April 2024 the Cabinet approved the Council's Corporate Plan for 2024/25. The Plan sets out the Council's strategic priorities and delivery objectives for the financial year and our role in delivering the overarching vision of the borough's LET'S Do It! Strategy.

The Plan was agreed in the context of the Council's significant financial challenges with both reducing funding and increasing demand contributing to a reported circa. £30m financial gap in the Council's finances over the coming three years. The agreed Plan was structured around three overarching priorities:

- **Sustainable Inclusive Growth**
- **Improving Children's Lives**
- **Tackling Inequalities**

As part of the Plan, key objectives were described against each of these priorities, together with a clear set of quarterly delivery milestones. The Plan also included objectives and milestones for the **enabling actions** needed to ensure the organisational conditions necessary to deliver the priorities.

To support monitoring of the Plan, alongside measuring delivery of the agreed milestones (Appendix One), an initial set of Key Performance Indicators (KPIs) was set out. These have since been revised following operational feedback and the current suite of delivery KPIs is provided in Appendix Three.

As well as those priorities agreed in April, since the Plan was agreed the Council has responded to a number of unforeseen demands and additional pressures. Most notably this includes responding to the outcomes of the local area SEND inspection, published on 7 May and preparation for the General Election which was announced on 22 May and took place in July. This has had an impact on the delivery against milestones which will be fully assessed at the end of Quarter Two (Appendix Two).

This report describes the significant progress made in the first six months of the financial year (April to September 2024) against the Corporate Plan priorities and objectives. This includes:

- **Sustainable inclusive growth**

- The completion of enabling works for the new Radcliffe Hub with work on building foundations now well underway.
- Completion of the land assembly needed to facilitate delivery of the Bury Market and Flexihall developments.
- Significant progress with the Council's housing delivery pipeline to address housing need in the borough.

- **Improving Children's Lives**

- Continued positive progress with the Ofsted improvement journey with improvements in re-referral reductions and responsiveness in the context of continued growth in demand.
- Good progress with the agreed Quarter One milestones for SEND improvement following the partnership inspection and subsequent judgement. Corresponding progress in the delivering of Project Safety Valve milestones to pay down the Dedicated Schools Grant, and a continuation of strong performance around Education Care and Health Plan (EHCP) timeliness with 97% of EHCPs completed within 20 weeks
- Significant progress against the programme plan to ensure the opening of the new high school in Radcliffe in September 2024.

- **Tackling Inequalities**

- Significant progress in health and care including: agreement to an investment plan for Health Visiting in Bury by the Northern Care Alliance; recovery of NHS healthcheck performance to pre-covid levels and an award of funding to support 536 long-term sick or disabled people to start, stay, and succeed in work through integrated work and health support over an 18-month programme (WorkWell).
- Progress with the Redbank Pavilion 3G pitch and a successful grant application for a further pitch in Top Park in Ramsbottom.
- Ongoing work to re-integrate housing service back into the Council and demonstrable improvement in building safety and regulatory compliance and new governance and tenant engagement structures in place.
- On track progress with the allocation of Housing Support Funds (HSF) and the objective of full utilisation and work progressing around the Council's wider Anti-Poverty Strategy

Work to progress the **enabling actions** described in the Strategy has been informed by the outcomes of the Local Government Association (LGA) Corporate Peer Challenge, as reported to Cabinet in April, with significant focus on addressing the budget challenges facing the Council. Key to this has been the appointment of a substantive Director of Finance Director (Section 151 Officer), who is now in post, and the transition of all corporate functions to a single Council Directorate under the leadership of the Executive Director (Strategy & Transformation). A strengthened Member Development offer has also been developed and plans are in place to launch this in full following the General Election and summer recess.

As set out within the April Cabinet report, and as is good practice in corporate planning, work has been undertaken to review the delivery plan for the remainder of

the financial year in the context of changes in the national and organisational context and a revised delivery plan for the remainder of the year is set out.

Recommendation(s)

Cabinet is asked to

1. Note the update on progress against the Corporate Plan 2024/25.
2. Agree the development of a revised delivery plan for the remainder of this financial year.

Reasons for recommendation(s)

To enable transparency and robust monitoring of performance and delivery of the Corporate Plan.

Alternative options considered and rejected.

Not applicable.

Report Author and Contact Details:

Name: Kate Waterhouse

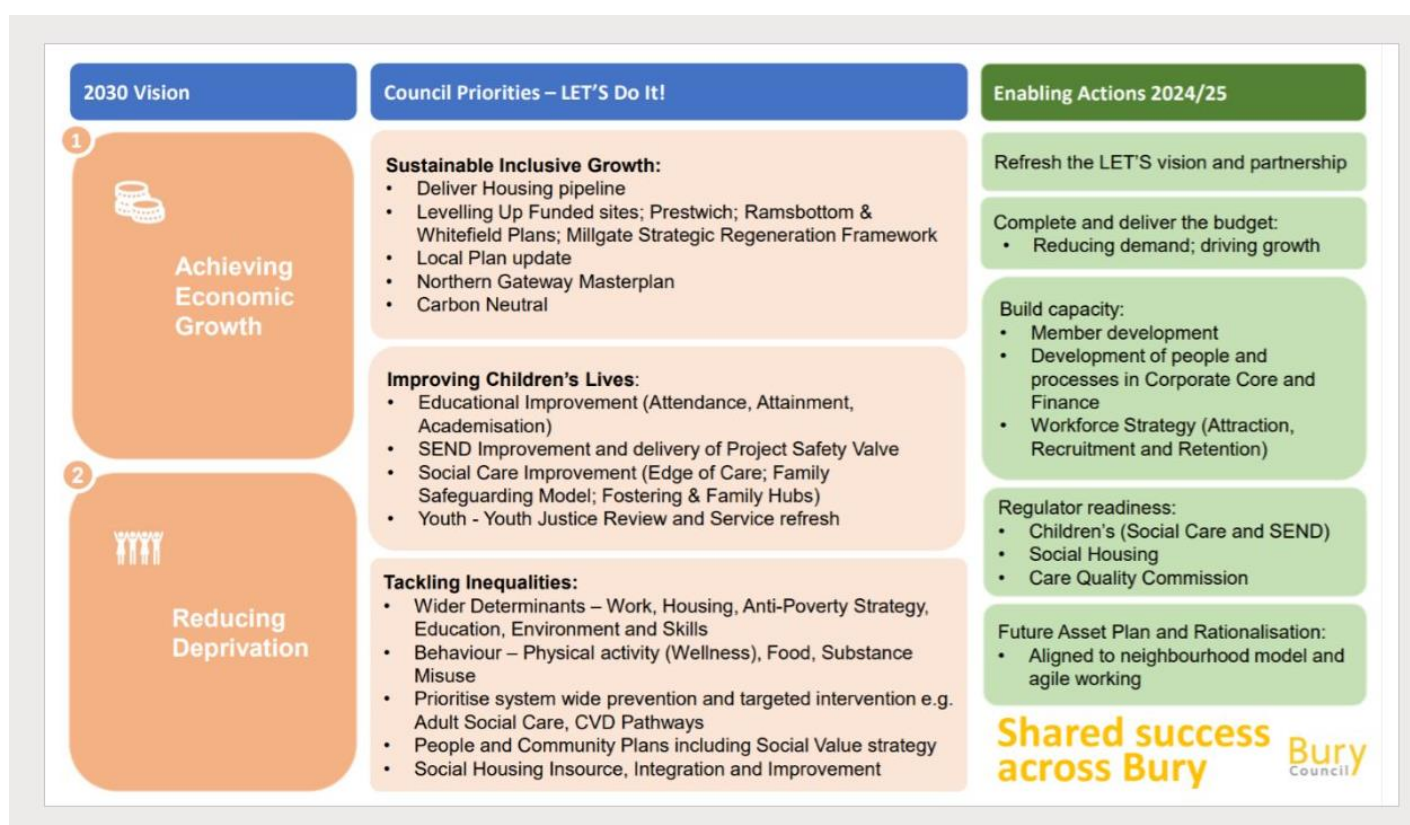
Position: Executive Director of Strategy & Transformation

Department: Corporate Core

E-mail: k.waterhouse@bury.gov.uk

1. Background

- 1.1 In April this year the 2024/25 Corporate Plan was published and set out the Council's strategic priorities and delivery objectives for the year.
- 1.2 The Corporate Plan has been designed to reflect a tighter set of corporate priorities following feedback from the last LGA Peer Review in December 2023, hence the focus on the three priorities with a streamlined set of objectives. The priorities overlay the "business as usual" departmental functions which are described separately in service planning documents.



2. Progress Since Approval of the 2024/25 Corporate Plan

- 2.1 The table in Appendix Two provides a snapshot overview of progress against the Quarter One milestones agreed by Cabinet in April as at the end of June 2024. This review of progress has been further supplemented by information gathered for the Leader's statement to Council earlier this month and therefore this following report includes a summary of activity between April and September 2024.
- 2.2 As set out, there are a number of areas where progress has been delayed. This has, in many areas, been due to the General Election announcement and associated pre-election restrictions and delays to Council meetings. Whilst it could be argued that the delivery of elections should be seen as business as usual for the Council, having the General Election whilst still undertaking the work to close down the May Local and GM Mayoral Elections, and having to

apply new legislation regarding overseas voters, placed the Council and its Democratic Services Team under considerable extra pressure. Calls to the Contact Centre increased considerably as a result of the residents wishing to check whether they need to re-register to vote in a General Election and there were many complex queries due to a shortened timescale in which to prepare for handling postal and proxy votes. Despite these challenges, the General Election was delivered with over 80,000 votes verified and counted.

2.3 Quarter One also saw the publication of Bury's Local Area SEND inspection which required significant capacity from officers across the Council to assure the robustness of Bury's immediate response and action plan.

2.4 Though not unforeseen, the work needed to progress the integration of Housing Services (in the context of the new regulatory requirements) as required the focus on a number of teams across the Council as services have started to integrate with their respective functions.

2.5 Finally, work to progress budget planning and recovery works have also required a greater emphasis and focus, which planning continuing across the summer recess in order to prepare for the autumn statement and the annual cycle of budget planning in the second half of the municipal year.

2.6 Sustainable Inclusive Growth

Key Achievements:

- Progress with our Housing Pipeline and Levelling Up Funded developments on track despite a slight delay for Prestwich Village RIBA Stage 2/3 with commencement in July.
 - Housing Delivery on track with a topography survey completed at the Elms, planning application submitted for Fletcher Fold and planning in development for the former Fire Station site and Elton Reservoir.
 - Procurement for the Bury Town Centre Heat Network has been undertaken, along with the first phase of contract signing for the Electric Vehicle Charging Infrastructure (EVCI), key to supporting our carbon reduction commitment. In addition, Bury is one of only two authorities to have achieved the new standard around minimisation of environmental impact within catering services. This has supported cost and the equivalent of 757,608kg CO₂e annually.
- 2.7 Our outcome measures show that in March 2024 there were 2,375 individuals on the housing waiting list, the largest ever figure. In addition, 160 households were in temporary accommodation with the average wait for housing of 556 days. For the first time in Bury, over the last twelve months it has been necessary to use Bed and Breakfast provision for temporary accommodation due to the lack of availability of affordable housing and more suitable temporary accommodation. This demand for housing support also reflects the wider economic pressures. In March 2024 there were 5,335 people in Bury claiming a work-related benefit, mainly Universal Credit, an increase from 4,800 in September 2023. Despite efforts post-covid there are still more

people out of work. This highlights the rationale behind the prioritisation of inclusive economic growth within our plan and the focus of work undertaken since April.

- 2.8 Since April, the Council has been engaged in several critical growth projects. Following completion of early demolition and enabling works, the Radcliffe Hub and Market Chambers project completed foundation and piling works, sinking 469 augured piles, preparing the ground to receive the steel frame for the Hub building. Significant structural and weather-proofing works have also been completed in the Market Chambers building in addition to works to the Market basement. This has included structural and repair works alongside activity to extend the space. Our contractor, Vinci has also returned significant social value by establishing a Community Skills Centre to provide young people (18-24) with construction skills and health & safety training in a classroom and site based environment. Vinci are keen to use this centre to introduce young people to employment via its supply chain. This activity will continue for the life of the project and is linked to the Radcliffe Goals initiative already on-going at the Football Club.
- 2.9 The UK Shared Prosperity Funded (UKSPF) Radcliffe Pocket Park has been fully designed and will be tendered this week. This project has been developed in consultation with the local community and has been used as a training initiative by officers to develop trainee staff members. The works will begin in October (in line with planting and nesting season) and be completed by January next year.
- 2.10 The Council has now let a construction contract to deliver the Bury Flexi Hall and Market project and mobilisation activity will begin over the next few months, starting with utility diversions. The demolition activity will begin in November following the movement of the Admiral Casio operation to the Mill Gate Shopping Centre. It is a great success to see this incredibly complex project moving into a construction phase and the Council has overcome numerous difficult operational and design challenges to get to this stage.
- 2.11 The Prestwich Village Regeneration project completed a significant milestone in July when the team secured a Planning Permission to deliver the first phase of the project via a unanimous decision at Planning Committee. Officers will return to Cabinet later in the year for permission to deliver the Travel Hub element of the project once final designs are completed (RIBA 4).
- 2.12 Significant progress has also been made in terms of housing, with contractors now on site at Green Street and School Street (Radcliffe) and Seedfield (Bury). These developments alone, will provide over 300 homes on former Council owned brownfield land, 140 of which will be affordable.
- 2.13 Since the transfer of the Council's Social Housing stock, the Council have agreed to a £20 million investment in the refurbishment of Bury's Housing stock. Over the next year, hundreds of Bury Council homes will receive new and upgraded kitchens, bathrooms and windows. The planned improvements include:

- 565 homes will get replacement windows, doors, pointing and lintels.
- 138 will have replacement kitchens, bathrooms or heating fitted.
- 386 homes will get replacement roofing.
- 326 will see improvements to communal areas.
- 314 homes will have carbon reduction measures installed.

2.14 An update to September Cabinet also highlights the progress that has been made in developing formal joint working arrangements with Rochdale Council to undertake further work on Atom Valley and Northern Gateway, and to approve Northern Gateway as part of Greater Manchester's Investment Zone. Atom Valley MDZ was designated in 2022 and spans the local authority areas of Rochdale, Bury and Oldham. It aims to deliver a nationally significant area of economic activity along the M62 corridor through parts of Bury, Rochdale and Oldham and supported by a significant increase in new homes. The Mayoral Development Zone (MDZ) is the single largest economic opportunity within Greater Manchester. It provides a critical opportunity for inclusive growth to rebalance and enhance productivity within the Greater Manchester city-region, contributing to national economic growth and Levelling Up. The Northern Gateway is the largest growth site and includes two sites, one at Heywood/Pilsworth and the second at Simister/Bowlee. Two residential phases of the consented development are under construction and a third is due to commence shortly.

2.15 Improving Children's Lives

Key Achievements:

- Our 2024 virtual school conference was held in June, hosting 120 delegates from education and social care. The conference featured Steven Russell as a keynote speaker focusing on how schools can implement relationship-based policies which is essential to develop our partnership working in this area.
- All Quarter One milestones for SEND Improvement and delivery of Project Safety Valve were completed apart from the consultation on Short Break's. This has now been picked up under the newly appointed SEND Head of Service post. In addition, the SEND team have continued to maintain good performance around EHCP timeliness compliance – with 97% of EHCPs completed within 20 weeks.
- Identification of a building for the delivery of Family Hub sessions and services on the Chesham estate is now complete. Further works will be required to enable delivery, and this is expected to late summer or in the Autumn term.

2.16 Analysis of our outcome measures shows the progress that has been made but also the challenging context of increase demand both in terms of volume and complexity. As at March 2024, 92.6% of Bury Primary schools were rated good or better. 59.2% of Bury High schools have the same rating, compared to 91.3% and 42.2% last year. This improvement is important as it reflects the work undertaken to focus on attendance and attainment and the quality of

educational experience for our children and young people, as prioritised within the Corporate Plan.

- 2.17 We now have over 1,500 Bury Children in Need. Nearly a quarter of these are in care and 14% have a child protection plan. The total number of children supported is in line with national averages, with the number with a child protection plan above however we have seen an increased in demand for residential placements which has a direct impact on the overspend position within the Children's budget. Between February and August 2024 96% of new Education, Health and Care Plans (EHCPs) for Bury children were issued within 20-weeks. Bury is one of the few councils in the country to achieve this consistently. The total number of EHCPs for children in Bury scaled per head of population remains 30% above the national rate, reflecting the pressures on the system identified in the SEND inspection and within the Project Safety Value work programme.
- 2.18 Children's Services continues to experience an increase in presenting need and requests for help and support. Since the spring of 2024, there has been a rise in the amount of work received by children's social care and in the number of assessments being undertaken, which increased caseloads in the assessment teams and led to the need for additional capacity to meet that demand. With the additional capacity in place, the assessment teams have completed 677 assessments since the start of June, 88% within the 45 working day timescale, while sustaining a re-referral rate in line with national averages.
- 2.19 Outside of Children's Social Care, there is continued growth in the number of children with an Education, Care and Health Plan (EHCP). 2,850 children and young people in Bury have an EHCP. This represents an increase of 300 on a year ago (+12%). Scaled against population, Bury has 755 EHCPs per 10,000 children aged 4 to 19 years of age, compared to a national average of 562: - i.e. 34% higher. Similarly to the national pattern, in Bury most EHCPs are for three areas of primary need: autism, speech language and communication; and social emotional and mental health needs.
- 2.20 The impact of this nationally and reflected locally in Bury is the number of children with EHCPs and the increasing level of presenting need within the child population is challenging the ability of mainstream primary and secondary schools to meet need, leading to an increase in the number of children with EHCPs being educated in special schools; and a marked increase in the number of children being educated in independent and non-maintained special schools (INMSS) (i.e. schools outside of the maintained sector). Our PSV programme is continuing to be delivered to mitigate this and increase the resource in in-house provision.
- 2.21 During Quarter One in addition to work on the two Improvement Plans for Children's Service prior to sign-off in Quarter Two, significant work has been undertaken on the development of a Corporate Parenting Strategy. The strategy includes key strategic priorities:

- Supporting engagement and achievement in education, training, and employment.
 - Ensuring that our children in care and care leavers have stable and secure homes and sufficient support.
 - Listening and responding to the voice of our children, young people, and care leavers.
 - Ensuring that our children, young people, and care leavers are healthy and are supported in the physical and emotional wellbeing.
 - Developing a Highly Effective Care Leavers Partnership.
- 2.22 Following the local area SEND inspection, Cabinet have agreed to additional capacity in the SEND service as well as a co-produced SEND priority impact plan, Member agreed additional training for existing and newly recruited staff. In addition, future reviews of the education psychology service, outreach and sensory support services and SEND transport. Within the Health and Care System, an investment plan for the Health Visitor service signed off by Northern Care Alliance has agreed to the recruitment of an additional clinical lead and 4.76 health visitors, this will make a big contribution to our partnership ambition around SEND.
- 2.23 In August the Council received a pre-planned follow up visit from Mark Riddell MBE, the National Implementation Adviser for Care Leavers. The feedback letter included reference to the fact that during his visit he was impressed by “a real shift in leadership and management approach that was ambitious, aspirational and I got a real sense of passion and commitment to have a better offer for care leavers across the whole service area. It was clear to see real signs of change following my previous visit.” A series of further recommendations were left with the Council around continuing to improve the offer for care leavers in housing, health and entry into employment which will be assessed during a follow up visit in the new year.
- 2.24 In terms of the wider school improvement programme, strong outcomes remain a relentless focus of the education department. As the majority of our high schools are part of Multi Academy Trusts, we will continue to support and challenge MATs through our senior leader meetings and the offer of brokered support. Local Authority maintained schools will continue to be provided with a bespoke package of support based on areas identified in this data should it vary from national norms or from predicted outcomes. The Quality Assurance Team is now in the process of analysing school level data with school senior leaders to design this support. Provisional analysis of the Key Stage Four results for 2023/24 are provided below. Whilst there appears to be some mixed progress, it should be noted that these are indicative results based on unvalidated data and are subject to change. Likewise, the A level results from our colleges have yet to be verified and therefore greater detail cannot be shared. However, our colleges have reported positive A level results and Level 3 equivalents and are confident this will compare favourably with national averages.

2.25 Tackling Inequalities

Key Achievements:

- In terms of health and care inequalities the following activities were delivered in the first six months of the 2024/25 Corporate Plan:
 - Intermediate Care (IMC) services review initiated with the completion of an internal commissioning review producing a report on recommendations and action plan.
 - Investment plan for the Health Visitor service signed off by Northern Care Alliance. Recruitment to commence for the clinical lead and health visitors.
 - NHS Health Check performance is now recovered to approximately pre-pandemic levels.
 - Targeted work is taking place to increase the uptake of cancer screening (which we know helps with early identification and treatment outcomes), in Bury East a range of work has happened on bowel screening where we know uptake is low and bowel cancer is more prevalent and we are starting to see an increase in numbers taking part in bowel screening.
 - Awarded funding to support 536 long-term sick or disabled people to start, stay, and succeed in work through integrated work and health support over an 18-month programme (WorkWell).
- To support increased physical activity amongst children and adults, Redbank Pavilion 3G pitch is on track and due to complete early on in quarter 2. There has also been a successful grant application for a 3G pitch in Top Park, Ramsbottom.
- Bury has won a Sustainable Food Places award which recognizes the work to promote healthy, sustainable and local food. The partnership saw the potential in using Bury Market as the local flagship food space to utilize Healthy Start – where uptake has increased to 69% in June 2024 higher than the national average of 66.1%.
- Our Housing regulatory requirements in Quarter One were 100% compliant and met target for gas safety, legionella, lift compliance and asbestos.
- A strategic change partner has been procured to support the further integration of Housing Services and identify ways to improve tenant satisfaction. This will happen alongside a planned mock inspection in the quarter 3 to prepare the service for ROSH (Regulator Of Social Housing).
- The new Bury digital support website is live which includes resources for residents and community groups, support for anyone looking for digital skills , assistance for businesses looking for digital opportunities.

2.26 Despite these achievements, our outcomes data tells us that the life expectancy gap between residents who live in the most deprived areas and the least deprived areas is widening to over 10 years. Deprivation creates an unfair advantage for residents depending on where they live in Bury. The Good Level of Development gap between children who have Free School Meals and children overall widened to 17.2% in 2023 from 11.6% in 2019. This shows that children in more deprived areas are less likely to achieve at

the same levels as others. The gap between children in receipt of Free School Meal and overall children in Bury in terms of GCSE attainment also widened, demonstrating that the impact of deprivation continues for our children and young people up until a critical point in their education and beyond. However, more positively, the percentage of children accessing 2-year-old free childcare was 81.5% in the Spring Term 2024. This is a significant increase from 68.5% in the Spring Term 2023.

- 2.27 Early intervention is key to improving inequalities and access to services for those children from deprived areas at a young age is essential. The provision available data for this years' exam results suggest that in terms of GCSE Results, 42% of Bury children received a good pass (5-9) in English and Maths. This is 2% above Bury's performance last year. We are yet to see Greater Manchester and national data so cannot yet ascertain whether this is a trend in other areas. This provisional data also suggests that 63% of Bury children received a standard pass (4-9) in English and Maths. This is 1% below Bury's performance last year but we are yet to understand whether this is a local or national trend. Similarly, Bury's attainment 8 is 44.3 which is 0.4 below Bury's performance last year. National statistics are not yet available.
- 2.28 As part of our commitment to improving the quality of accommodation and housing conditions, Bury Council have awarded Adullam Homes a four-year contract for supported accommodation. Calico Homes has been selected to provide the floating support offer. Their comprehensive support system and proactive engagement with service users will ensure that individuals receive the necessary assistance to maintain their independence and well-being. It should be noted that this service will also be tenure neutral, meaning it will work with residents in social housing, private rented accommodation and also those that have mortgages or are owner occupiers. Also, this service will deliver much needed provision for older people in sheltered accommodation and those in the community.
- 2.29 Bury Council have recently reviewed the Housing Allocations Policy this work has been undertaken to meet local needs and to maximise the use of Council Housing stock to meet increasing demands. The Policy highlights and recognises the Council's commitments to its Looked After Children.
- 2.30 These examples reflect some of the work undertaken as part of the transfer of Six Town Housing into the Council. The first six months progress against the Improvement Plan have included:
 - As part of the commitment made in the June 2023 Cabinet Report, the stock condition survey is now at 83%, which is above the industry average, and a plan is in place for to survey the remaining properties.
 - 49 properties (as of June 2024) identified as potentially non-decent have been included in programmes for work for 24/25.
 - There has been a significant increase in the accountability and assurance regarding reporting both property compliance and customer satisfaction. There have been continuous improvements in addressing outstanding high-risk areas of non-compliance. Fire risk assessments, Gas safety checks,

Legionella checks, lift compliance and asbestos surveys are 100% and follow up actions are being managed and outstanding backlog reducing.

- A new prioritisation of repairs has been implemented, and the backlog has been reducing consistently over the last eight months. Response times have also been introduced against more meaningful criteria and are now improving.
- A 30-year HRA Business Plan has been agreed, which sets investment plans to manage and maintain council housing stock in the context of capital funding levels, treasury management and borrowing capacity.
- The 2024/25 £19.8m Capital Programme was agreed at Cabinet on 16th July 2024 to improve homes, increase energy efficiency and meet the decent homes standard.
- A new Tenant Engagement Strategy has been developed, building on the results from the Test of Opinion and feedback from the Tenant's Voice Group and others.

2.31 This work will be presented to the first substantive meeting of the Housing Advisory Board in September 2024 and will be overseen by the Council's new Housing Overview and Scrutiny Subgroup which had its first meeting earlier this month.

2.32 Work has also been undertaken to secure and promote a new local credit union (Hoot) to work with local people and groups, to support them with their financial planning e.g. savings, affordable loans etc. This has been promoted through all partners. Adult Learning have also played a pivotal role in offering incentivised tailored courses to support those in work who are experiencing hardship, these courses include money management, managing on a budget, basic maths/finances and healthy eating on a budget. These have been promoted through local employers. 65% of learners who attended the courses were from priority areas (i.e. the most deprived areas).

2.33 WorkWell is an early-intervention work and health support and assessment service, providing holistic support to overcome health-related barriers to employment, and a single, joined-up gateway to other support services. NHS Greater Manchester has been named as 1 of 15 national WorkWell Partnership Vanguard sites following an Expression of Interest process that involved all ten GM localities. Under the GM 'Locality Led, GM Enabled' proposals between a 'go live' date of 1st October 2024 and 31st March 2026 GM aim to support 8,000 people who are at risk of becoming economically inactive through poor health and have been allocated up to £7million to achieve this. This will be by strengthening our focus on prevention and building upon our existing locality work and health provision. The target is 336 participants to be supported in Bury over the 18 month period.

2.34 In terms of improving physical wellbeing as a way of addressing inequalities, Ramsbottom will be the home of the latest 3G all weather football pitch, the £1.4 million project is at Top Park Playing Fields, and will include improvements to the pavilion and car park. Bury Council is putting £425,000 behind the scheme, with around £1 million coming from the Football Foundation.

- 2.35 The General Election has delayed the Social Value Strategy design. Sign off is expected by the end of Quarter Two following a joint engagement session with Council executives and Cabinet members.

2.36 Enabling Actions

Key Achievements:

- The medium-term financial strategy (MTFS) plan has been updated to reflect additional grant income from the settlement and a review on assumptions has taken place. Additional pressures which have come to light are currently being reviewed along with the development of savings proposals. An updated position will be presented at the July Cabinet with a further update to follow in the Autumn.
 - Sickness absence for the authority has reduced since the beginning of 2024 down to an average number of 13.19 days lost per full time equivalent (FTE) per year at our Quarter One position.
- 2.37 A significant focus of the Council's enabling functions in Quarter One was placed on delivery of both the Local Election and planning for the General Election following its announcement in May. The Contact Centre received 2631 casework requests during Quarter One and an additional 1,460 calls were handled following the announcement of the General Election with an answer rate of 97% which demonstrates the ability to handle additional pressures in our day to day business.
- 2.38 The majority of corporate functions within the former Six Town Housing, including finance, HR, ICT and communications, formally transferred to the leadership of the central corporate teams on 15 July marking a significant step in integrating housing operations into the Council. Alongside this work has progressed to develop an overarching improvement and integration plan. Structural changes in relation to the management of complaints, Members' Casework and Information Governance have also been delivered bringing these functions together into a central team under the leadership of the Director of Law and Governance to support improved assurance and compliance.
- 2.39 As noted under the key achievements, sickness absence has reduced since January. This reduction has been driven by a strengthened focus on both long and short term absence across Departments and with enhanced support from HR in those areas with the highest sickness levels (Operations and Health and Adult Care) which have seen the greatest level of improvement. This has also been supported by the Council's strengthened Occupational Health provision introduced last year alongside a continued emphasis on employee wellbeing. Sickness absence, however, remains above the corporate target of 9.5 days and improvement work here is continuing. This will include agreement to a new Managing Attendance Policy in Quarter Two which has been codesigned with managers and developed in partnership with Trade Union colleagues.

- 2.40 A key recommendation from the LGA Peer Challenge was the development of a Strengthened Member Development offer, including focused support for senior Members and access to dedicated LGA development support. This work was co-designed with members in Quarter One, however, formal sign off and launch has been delayed due to the General Election.
- 2.41 A new substantive Finance Director was appointed in April and has now taken up post. As part of this appointment the finance function has been integrated within the Corporate Core Department to support the better coordination of corporate delivery and development of an integrated budget and transformation strategy in-line with the LGA recommendations.
- 2.42 The planned refresh of the LET'S Strategy and development of a new Workforce Strategy have both been delayed given the above unexpected areas of work and focus. However, work here is now progressing with delivery expected across Quarters Two and Three.

3. Updated Delivery Plan to Year End 2024/25

- 3.1 A revised delivery plan is currently being developed to reflect the updated local and national context and reflective of new priorities, including response to the SEND inspection, the LGA Peer Challenge Actions and agreed Health Inequalities Strategy as well as the continued critical emphasis on savings and budget delivery with reference to the finance update included elsewhere on Cabinet's agenda.
- 3.2 The following milestones are uncompleted at Quarter One and have been re-profiled to enable delivery:
- New LET'S Do It! Strategy
 - LET'S Do It! Workforce Strategy
 - Corporate Plan Briefing Session for Members
 - Completion of roadmap for integration of Housing Services
 - Social Value Strategy
- 3.3 A review of milestones in the 2024/25 has also taken place to reflect delivery of our MTFS and additional demands. This will be updated at the close of Quarter Two and presented to Cabinet in November.

4. Conclusion

- 4.1 As can be seen from this report, significant work has been undertaken against the delivery milestones in the Corporate Plan as agreed at Cabinet in April 2024. Whilst there has been some need to amend work programmes due to unanticipated demands, the totality of the Plan is still on track to be delivered in 2024/25.
- 4.2 The connection between the priorities of the Corporate Plan and the Medium Term Financial Strategy have been illustrated through the increased demand data for Children's Social Care, SEND, Adult Social Care and Housing, all of

which have placed in year pressures on the budget as reflected in the Budget Update Report received by Cabinet in July 2024. As such, further work is being undertaken to look at how work on these areas can be re-focused to reduce in-year projects and support the budget strategy. This will be presented in the updates to Cabinet in November.

Appendix One: Corporate Plan: Agreed Delivery Plan as at April 2024

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

Appendix Two: Progress against Quarter One milestones

Quarter One: Progress on a Page		
Sustainable Inclusive Growth	Social Value Strategy	Work progressing but Member engagement session delayed. Now working towards sign off at November Cabinet
	Roadmap for integration of Housing services approved	Underway with full update to September Cabinet
	Local Plan Reg. 18 notification, Call for Sites and IA Scoping	Early engagement on Local Plan (Reg 18 notification, Call for Sites and IA Scoping) undertaken between 25 March and 6 May 2024.
	3 former council owned housing sites commence – c.300 houses/units	Development started
	Strategic disposal of Spurr house (c.30 Units) procurement commences	Disposal on track. Agent appointed to market site in Q2.
	Strategic partner procured for 100% affordable housing site (24 units)	Delays due to pre-election period
Improving Childrens Lives	Radcliffe school build begins; Hub enabling works complete and main works commence	Progressing on-track
	Edge of Care team launched	Change of approach to restructure team from traditional Social Work roles contributing to delay
	Chesham Family Hub offer	Issues with building possession (now resolved)
	Review of Primary In Year Fair Access Protocol (IYFAP) Panel	Wider consultation to progress in July
	Schools focus on Careers Information and Guidance (CIAG) and transition.	Monitoring visits with school taken place but some slight delays
	PSV monitoring report submission.	Submitted 29 May 2024
Tackling Inequalities	Finalise the implementation plan for Health Visitor (HV) service and begin HV recruitment.	Recruitment to commence immediately
	Initiation of Intermediate Care (IMC) Services review	Action plan prepared
	Completion of ASC self-assessment for CQC readiness	Summary and long term drafts prepared
	Redbank 3G pitch complete	Slightly delayed but due for completion mid-July
Enablers	Refreshed LET'S strategy	Deferred to Q2 due to timing of the General Election
	LET'S do it Workforce strategy	Work underway but delayed. Agile Working review to July Employment Panel. Strategy to follow in Q2
	MTFS delivery Plan approved, including updated transformation plans	The medium-term financial plan has been updated to reflect additional grant income from the settlement and a review on assumptions has taken place.
	Development plan for Cabinet & wider Elected Members launched	Approach agreed by Members Development Group. Launch delayed to July after election

Appendix Three: Key Performance Indicators

Inclusive Growth

Total planning applications received	Time Period & Figure	Q2 2022-23 228	Q3 2022-23 201	Q4 2022-23 198	Q1 2023-24 206	Q2 2023-24 208	Q3 2023-24 197	Q4 2023-24 177	Q1 2024-25 167
	Direction of Travel		↓	↓	↑	↑	↓	↓	↓
% of planning decisions granted	Time Period & Figure	Q2 2022-23 92%	Q3 2022-23 94%	Q4 2022-23 91%	Q1 2023-24 88%	Q2 2023-24 84%	Q3 2023-24 86%	Q4 2023-24 88%	Q1 2024-25 88%
	Direction of Travel		↑	↓	↓	↓	↑	↑	↔
Average waiting time on housing register (all applications) (snapshot)	Time Period & Figure	Nov 23 537	Dec 23 542	Jan 24 540	Feb 24 548	Mar 24 553	Apr 24 546	May 24 582	Jun 24 597
	Direction of Travel		↑	↓	↑	↑	↓	↑	↑
Number of rough sleepers currently being supported	Time Period & Figure	Nov 23 66	Dec 23 74	Jan 24 71	Feb 24 95	Mar 24 101	Apr 24 89	May 24 93	Jun 24 92
	Direction of Travel		↑	↓	↑	↑	↓	↑	↓
Number of households in temporary accommodation on last day of the month	Time Period & Figure	Nov 23 155	Dec 23 137	Jan 24 145	Feb 24 151	Mar 24 160	Apr 24 158	May 24 148	Jun 24 147
	Direction of Travel		↓	↑	↑	↑	↓	↓	↓
NOMIS Claimant Count	Time Period & Figure	Nov 23 4880	Dec 23 4920	Jan 24 4985	Feb 24 5160	Mar 24 5235	Apr 24 5265	May 24 5385	Jun 24 5570
	Direction of Travel		↑	↑	↑	↑	↑	↑	↑

Children and Young People

The % of pupils attending a good or better Primary School in Bury	Time Period & Figure	Nov 23 91.2%	Dec 23 91.7%	Jan 24 92.6%	Feb 24 92.6%	Mar 24 92.6%	Apr 24 92.8%	May 24 92.8%	Jun 24 92.8%
	Direction of Travel		↑	↑	↔	↔	↑	↔	↔
The % of pupils attending a good or better Secondary School in Bury	Time Period & Figure	Nov 23 59.4%	Dec 23 59.4%	Jan 24 59.4%	Feb 24 59.4%	Mar 24 59.2%	Apr 24 59.2%	May 24 59.2%	Jun 24 59.2%
	Direction of Travel		↔	↔	↔	↓	↔	↔	↔
% of Pupils in Bury Schools with an EHCP	Time Period & Figure	Apr 22 4.5%	Jul 22 4.63%	Oct 22 4.8%	Jan 23 4.9%	Apr 23 5.1%	Oct 23 5.5%	Jan 24 5.7%	Apr 24 5.9%
	Direction of Travel		↑	↑	↑	↑	↑	↑	↑
EHCP: Percent of Plans issued on time, compliance at 20 weeks	Time Period & Figure	Nov 23 92%	Dec 23 95%	Jan 24 86%	Feb 24 100%	Mar 24 100%	Apr 24 83%	May 24 97%	Jun 24 97%
	Direction of Travel		↑	↓	↑	↔	↓	↑	↔
Rate of CLA per 10,000 children (latest snapshot)	Time Period & Figure	Nov 23 83	Dec 23 82	Jan 24 80	Feb 24 79	Mar 24 79	Apr 24 77	May 24 77	Jun 24 78
	Direction of Travel		↓	↓	↓	↔	↓	↔	↑
Rate of CPP per 10,000 children aged 0-17 (latest)	Time Period & Figure	Nov 23 43	Dec 23 45	Jan 24 49	Feb 24 47	Mar 24 51	Apr 24 52	May 24 58	Jun 24 57
	Direction of Travel		↑	↑	↓	↑	↑	↑	↓
% of children accessing 2 year take up of free childcare	Time Period & Figure	Dec 21 86.1%	Apr 22 79%	Jul 22 77.6%	Dec 22 74.1%	Apr 23 68.5%	Jul 23 69.9%	Oct 23 84.7%	Jan 24 81.5%
	Direction of Travel		↓	↓	↓	↓	↑	↑	↓
Number of residential placements (codes K1, K2, R1 and S1)	Time Period & Figure	Nov 23 40	Dec 23 42	Jan 24 43	Feb 24 41	Mar 24 41	Apr 24 42	May 24 43	Jun 24 46
	Direction of Travel		↑	↑	↓	↓	↑	↑	↑
Percentage school attendance of children in Bury with an EHCP (all absences)	Time Period & Figure					2018-19 92.5%	2020-21 87.9%	2021-22 88.2%	2022-23 88.6%
	Direction of Travel						↓	↑	↑
CLA – Percentage of CLA in foster placements	Time Period & Figure	Nov 23 65%	Dec 23 63%	Jan 24 68%	Feb 24 68%	Mar 24 68%	Apr 24 69%	May 24 68%	Jun 24 69%
	Direction of Travel		↓	↑	↔	↔	↑	↓	↑

Adults

Proportion of completed Adult Social Care (ASC) annual reviews in a rolling 12 month period									
Direction of Travel			↔	↑	↑	↓	↑	↑	↑
Proportion of people receiving long-term adult social care in the community	Time Period & Figure				Q1 2023-24 70.8%	Q2 2023-24 71.5%	Q3 2023-24 72%	Q4 2023-24 71.3%	Q1 2024-25 70.9%
Direction of Travel						↑	↑	↓	↓
Number of people on waiting list for ASC needs assessment (snapshot last day of the month)	Time Period & Figure						Apr 24 111	May 24 100	Jun 24 90
Direction of Travel								↓	↓
Median number of days waiting for an ASC needs assessment	Time Period & Figure				Q1 2023-24 116	Q2 2023-24 87	Q3 2023-24 71	Q4 2023-24 57	Q1 2024-25 39
Direction of Travel						↓	↓	↓	↓
Proportion of people that were asked about their outcomes (ASC)	Time Period & Figure	Q2 2022-23 63%	Q3 2022-23 57%	Q4 2022-23 59%	Q1 2023-24 63%	Q2 2023-24 75%	Q3 2023-24 88%	Q4 2023-24 88%	Q1 2024-25 86%
Direction of Travel			↑	↑	↑	↑	↑	↔	↓
Of those who expressed outcomes the proportion of people who have their safeguarding outcomes fully or partially met	Time Period & Figure	Q2 2022-23 88%	Q3 2022-23 97%	Q4 2022-23 97%	Q1 2023-24 100%	Q2 2023-24 90%	Q3 2023-24 94%	Q4 2023-24 95%	Q1 2024-25 95%
Direction of Travel			↑	↔	↑	↓	↑	↑	↔
The proportion of people who received short-term services during the year where no further request was made for ongoing support	Time Period & Figure	Q2 2022-23 76%	Q3 2022-23 76%	Q4 2022-23 79%	Q1 2023-24 80%	Q2 2023-24 81%	Q3 2023-24 82%	Q4 2023-24 84%	Q1 2024-25 89%
Direction of Travel			↔	↑	↑	↑	↑	↑	↑
The proportion of older people (65+) who were still at home 91 days after discharge from hospital	Time Period & Figure			2018-19 83%	2019-20 81%	2020-21 77%	2021-22 87%	2022-23 87%	2023-24 86%
Direction of Travel					↓	↓	↑	↔	↓

Number of people trained in the progression model	Time Period & Figure								Q1 2024-25 38
	Direction of Travel								
The proportion of people and carers who use services who have found it easy to find information about services and/or support	Time Period & Figure			2018-19 67%	2019-20 71%	2020-21 69%	2021-22 67%	2022-23 64%	2023-24 66%
	Direction of Travel				↑	↓	↓	↓	↑
The proportion of people who use services, who reported that they had as much social contact as they would like	Time Period & Figure			2018-19 42%	2019-20 49%	2020-21 47%	2021-22 45%	2022-23 40%	2023-24 46%
	Direction of Travel				↑	↓	↓	↓	↑
Total number of new carers registered with Bury Carers' Hub	Time Period & Figure								Q1 2024-25 38
	Direction of Travel								

Operations

% of council vehicles changed to lower emission versions	Time Period & Figure					Mar 24 98%	Apr 24 98%	May 24 98%	Jun 24 98%
	Direction of Travel					↑	↔	↔	↔
Number of potholes reported	Time Period & Figure	Oct 23 47	Nov 23 103	Dec 23 142	Jan 24 424	Feb 24 475	Mar 24 450	Apr 24 404	Jun 24 174
	Direction of Travel		↑	↑	↑	↑	↓	↓	↓
Waste collection (tonnes)	Time Period & Figure	Nov 23 4701.98	Dec 23 3965.56	Jan 24 4994.7	Feb 24 4367.3	Mar 24 4475.3	Apr 24 4903.96	May 24 6079.34	Jun 24 4948.1
	Direction of Travel		↓	↑	↓	↑	↑	↑	↓
Number of missed bin collections per 100,000	Time Period & Figure	Nov 23 118	Dec 23 121	Jan 24 159	Feb 24 88	Mar 24 98	Apr 24 100	May 24 103	Jun 24 86
	Direction of Travel		↑	↑	↓	↑	↑	↑	↓
Proportion of household waste recycled	Time Period & Figure	Nov 23 50.8%	Dec 23 45.4%	Jan 24 51.2%	Feb 24 48.2%	Mar 24 48.5%	Apr 24 51.4%	May 24 57.0%	Jun 24 56.7%
	Direction of Travel		↓	↑	↓	↑	↑	↑	↓
The amount (tonnes) of residual household waste per household	Time Period & Figure	Q1 2022-23 85.79%	Q2 2022-23 85.44%	Q3 2022-23 84.32%	Q4 2022-23 89.03%	Q1 2023-24 89.02%	Q2 2023-24 87.68%	Q3 2023-24 86.81%	Q4 2023-24 89.46%
	Direction of Travel		↓	↓	↑	↓	↓	↓	↑
Average time taken to repair street lighting	Time Period & Figure	Oct 23 7.6	Nov 23 9.8	Dec 23 16.2	Jan 24 29.7	Feb 24 20	Mar 24 14.7	Apr 24 15.8	Jun 24 6.1
	Direction of Travel		↑	↑	↑	↓	↓	↑	↓
Highway repairs completed on time (%)	Time Period & Figure				Q1 2023-24 66%	Q2 2023-24 73%	Q3 2023-24 65%	Q4 2023-24 63%	Q1 2024-25 66%
	Direction of Travel					↑	↓	↓	↑
Number of leisure memberships	Time Period & Figure	Nov 23 3831	Dec 23 3592	Jan 24 3784	Feb 24 3829	Mar 24 3906	Apr 24 4000	May 24 4047	Jun 24 4036
	Direction of Travel		↓	↑	↑	↑	↑	↑	↓
Number of licensing applications processed	Time Period & Figure	Nov 23 268	Dec 23 137	Jan 24 182	Feb 24 174	Mar 24 179	Apr 24 193	May 24 206	Jun 24 197
	Direction of Travel		↓	↑	↓	↑	↑	↑	↓

Corporate Core

Contact centre – number of contacts received	Time Period & Figure	Nov 23 18519	Dec 23 14261	Jan 24 21042	Feb 24 16653	Mar 24 19053	Apr 24 22697	May 24 21582	Jun 24 20256
	Direction of Travel		↓	↑	↓	↑	↑	↓	↓
Sickness absence: average number of days lost per FTE per year (Bury Council)	Time Period & Figure	Nov 23 14.6	Dec 23 14.68	Jan 24 14.88	Feb 24 13.96	Mar 24 13.71	Apr 24 13.47	May 24 13.31	Jun 24 13.19
	Direction of Travel		↑	↑	↓	↓	↓	↓	↓
% Staff turnover (Bury Council)	Time Period & Figure	Nov 23 12.51	Dec 23 12.4	Jan 24 11.96	Feb 24 11.78	Mar 24 11.72	Apr 24 12.19	May 24 12.27	Jun 24 12.63
	Direction of Travel		↓	↓	↓	↓	↑	↑	↑
% of FOIs completed on time (Bury Council)	Time Period & Figure	Sep 23 100%	Oct 23 75%	Nov 23 80%	Dec 23 75%	Jan 24 81%	Feb 24 83%	Mar 24 91%	Apr 24 93%
	Direction of Travel		↓	↑	↓	↑	↑	↑	↑
% annual PDRs completed in previous 12 months (Bury Council)	Time Period & Figure	Nov 23 56.7%	Dec 23 59.2%	Jan 24 60.6%	Feb 24 63.8%	Mar 24 58.4%	Apr 24 58.6%	May 24 54.7%	Jun 24 53%
	Direction of Travel		↑	↑	↑	↓	↑	↓	↓

Links with the Corporate Priorities:

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

Equality Impact and Considerations:

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

Environmental Impact and Considerations:

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

Assessment and Mitigation of Risk:

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

Legal Implications:

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

Financial Implications:

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

Background papers:

Report to Cabinet, 17 April 2024: [Corporate Plan 2025/25](#)

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

Term	Meaning
CLA	Children Looked After
CPP	Child Protection Plan

CVD	Cardiovascular Disease
EET	Education, Employment, or Training
IMC	Intermediate Care
KPI	Key Performance Indicator
LGA	Local Government Association
MTFS	Medium Term Financial Strategy
SEND	Special Educational Needs and Disabilities

This page is intentionally left blank



Classification: Open	Decision Type: Non-Key
--------------------------------	----------------------------------

Report to:	Cabinet	Date: 25 September 2024
Subject:	2024-25 Q1 Finance Position	
Report of	Cabinet Member for Finance and Transformation	

Summary

1. To present to members the 2024/25 forecast revenue outturn position as at 30 June 2024, noting the revised budget.
2. To present to members the 2024/25 forecast capital outturn position as at 30 June 2024, noting the revised capital programme and request approval of the re-phasing of the capital programme into future years.

Recommendation(s)

3. Cabinet is asked to:
 - Note the 2024/25 forecast revenue outturn position as at 30 June 2024 of a £2.620m overspend (1.17%) against a net budget of £224.480m.
 - Approve the in-year updates and re-phasing of the capital programme, revising the capital delivery programme for 2024/25 to £90.312m which will form the basis for future in-year monitoring and reporting of performance.

Reasons for recommendation(s)

4. To update members on the Council's budgetary position and actions taken or being taken to ensure budgetary targets are achieved.
5. This report is in accordance with the Council's financial procedure regulations.

Alternative options considered and rejected

6. N/A

Report Author and Contact Details:

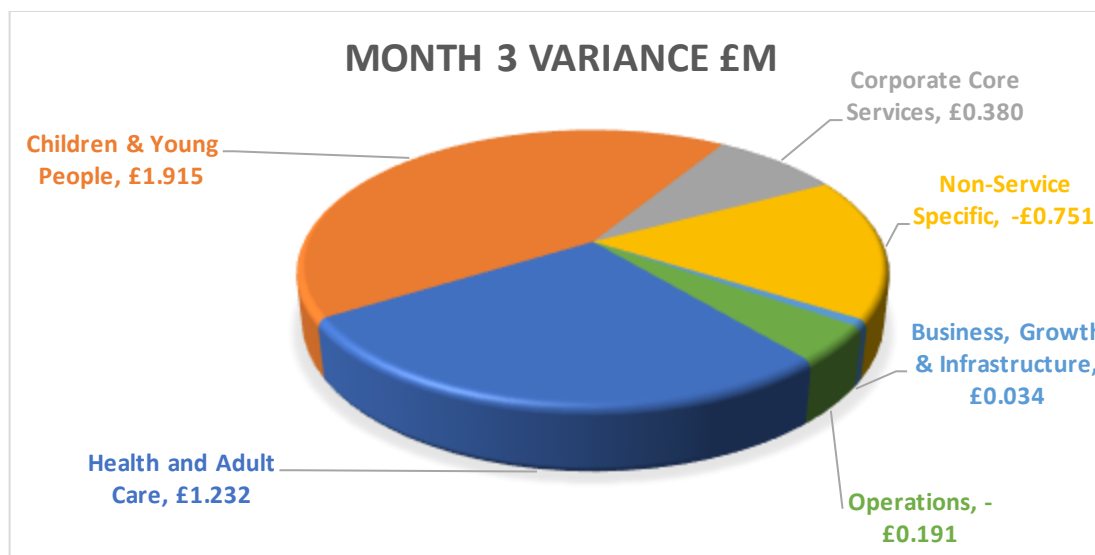
Name: Neil Kissock
Position: Director of Finance
Department: Corporate Core Department
E-mail: n.kissock@bury.gov.uk

Background

2024/25 Quarter 1 Forecast Outturn Position

7. The 2024/25 general fund revenue month 3 forecast outturn position shows an overspend of £2.620m which represents a variance of 1.17% compared to the overall net revenue budget of £224.840m. The forecast is based on expenditure and activity levels at an early point in the year, with assumptions made with regard to forecast changes over the rest of the year with the future demand for adult and children's social care services being inherently difficult to predict at this point in the year
8. The variance is in addition to an approved contribution from reserves of £13.149m to address the structural funding gap in the current year revenue budget set at February Council and amended at July Cabinet. Whilst the forecast variance is relatively small, officers are continuing to work on cost reduction measures targeted at delivering a balanced position as an overspend at year-end would become an additional call on reserves.

2024/25 Q1 Forecast Outturn	Revised Budget £m	Forecast Outturn £m	Forecast Variance £m
<u>Directorate:</u>			
Health and Adult Care	£86.517	£87.750	£1.233
Children & Young People	£56.761	£58.676	£1.915
Corporate Core Services	£26.864	£27.245	£0.381
Non-Service Specific	£36.949	£36.197	(£0.752)
Business, Growth & Infrastructure	£0.608	£0.642	£0.034
Operations	£16.860	£16.669	(£0.191)
Housing General Fund	(£0.079)	(£0.079)	£0.000
NET REVENUE BUDGET	£224.480	£227.100	£2.620
<u>Funding:</u>			
Council Tax	(£110.198)	(£110.198)	£0.000
Business Rates	(£71.282)	(£71.282)	£0.000
Government Funding Grants	(£29.851)	(£29.851)	£0.000
FUNDING	(£211.331)	(£211.331)	£0.000
<u>Use of Reserves:</u>			
Budget Stabilisation Reserve	(£13.149)	(£13.149)	£0.000
USE OF RESERVES	(£13.149)	(£13.149)	£0.000
BUDGET POSITION	£0.000	£2.620	£2.620



9. Details of the significant variances include:

Health and Adult Care:

- The Care in the Community budget is forecast to overspend by £1.250m (2.5%). The underlying position suggests a larger potential forecast overspend however, this forecast reflects the positive steps already in train to manage future demand and the Directorate will continue to work on reducing costs further and target the delivery of a balanced position by the end of the year,
- The main drivers of the overspend are due to:
 - Impact of the funding fallout of health monies regarding a contribution towards joint funded care packages
 - Withdrawal of Continuing Health Care (CHC) Funding CHC Funding
 - Increase of Section 117 Mental Health Aftercare Packages
 - Exhaustion of Self Funder financial resource
 - New Demand
 - Increases to existing Care packages
- The Commissioning and Procurement budget is forecast to overspend by £476k (2.75%), the main driver of the overspend relates to the Persona contract regarding £400k additional Supported Living staffing costs (£400k) and savings slippage (£76k). Work is ongoing between the HAC Directorate Commissioning Team and Persona to ensure that the £400k pressure is reduced over the course of 2024/25 and the Persona saving shortfall is delivered
- The Adult Social Care Operations budget is forecast to underspend by £254k (3.31%), the main driver of the £254k underspend are staffing vacancies within the following teams:
 - Assessment and Care Management Team.
 - Integrated Neighbourhood Team (INT).
 - Reviewing Team.
 - Community Mental Health Team.

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

- There is an underspend of £239k made up of a number of smaller individual variances.

Children and Young People:

- The Education & Inclusion division is forecast to overspend by £740k. Home to school transport is forecast to overspend by £500k (11.74%). There is a possibility of a reduction in projected spend when the new initiatives and policies adopted come into effect with the start of the new academic year and materialise in the figures - i.e. increasing take-up of personal budgets, reduced mileage costs and reducing spend on Post-16 provision. The other major overspend within this division relates to a £240k funding reduction from the Dedicated Schools Grant which is no longer achievable, this has been addressed in the MTFS for 2025/26.
- The Safeguarding and Social Care service is forecast to overspend by £1.517m overall, within this is an overspend of £2.500m (25.8%) in relation to residential placements, due to an additional 5 supported accommodation placements and an assumption of a level of ongoing demand for the remainder of the year. This is offset by underspends of £983k (14.99%) in independent fostering, in house fostering, and HEN (Housing Employment and New opportunities) services due to reduced placements. The additional agency budget of £1.4m has been re-aligned to the SEND Improvement Programme to ensure funds are in the correct place.
- The Children's Services Management Division is reporting an underspend of £216k (9.17%), due to staff vacancies within Business Support and an expected underspend on the agency budget.
- There is an underspend of £126k made up of individual variances below £100k.

CYP has required further investment to manage the in-year caseload demand pressures for an additional Initial Response Team; an additional Family Safeguarding Team; 2 additional Family Support Workers and fixed term Recruitment and Communications support. The part-year cost within 2024/25 is estimated to be £478k assuming recruitment is successful and posts are filled from 1 October 2024, these costs are to be funded from reserves in 2024/25 and have been built into the MTFS from 2025/26 onwards.

Corporate Core Services:

- Legal Services – Coroners is forecast to underspend by £60k (6.15%)
- Democratic Services – is forecast to underspend by £102k (3.72%), made up of a number of small individual variances below £100k.

- The Corporate Core Executive Director service is forecast to underspend by £55k (0.79%), due to:
 - staffing vacancies of £420k: (Digital Data & Technology services (formerly ICT), £309k (7.56%), Strategic Partnerships £92k (21.89%) & Delivery Unit £19k (21.84%)).
 - Additional one-off income of £21k within Emergency Response & Resilience.
 - offset by a review of infrastructure and support contracts (systems moving from onsite to the Cloud) £389k (24.77%)
- The £532k (8.14%) overspend in Finance is a consequence of bringing in additional resources over and above establishment to cover key roles within services such as in CYP, Operations and Corporate Core, Corporate Finance and Revenues and Benefits.
- There is an overspend of £66k made up of individual variances below £100k.

Non-Service Specific:

- The Cost of Borrowing budget is forecast to underspend by £688k (28.36%) due to forecast income on investments and less borrowing.
- There is an underspend of £64k made up of individual variances below £100k.

Business Growth and Infrastructure:

- BGI is forecasting broadly on budget with an overspend of £34k (5.30%) made up of individual variances below £100k.

Operations:

- Commercial Services is forecast to overspend by £353k (28.98%), due a forecast underachievement of income within Markets, specifically within the Market Hall £600k (22.61%) offset by underspends on Markets staff costs (£90k) (13.16%), Markets non payroll costs (£67k) (5.75%) and Civic Venues, Caretaking & Cleaning (£90k).
- Facilities Management is forecast to underspend by £560k (20.33%), due to:
 - Architects – is forecast to underspend by £243k, due to staffing vacancies £381k (33.31%) and employee costs recharged to capital schemes £183k (126.44%); offset by overspends on CIS related spending £306k (60.02%) and the use of agency to cover vacant posts £22k.
 - Admin Buildings – is forecast to underspend by £317k (11.70%), due to lower-than-expected energy costs £255k (45.65%), rates £80k (12.71%), CIS related spend £140k (50.93%), staffing vacancies £74k (17.23%) and management fees £41k (100.00%); offset by projected under-recovery of rental income £154k (due to delayed closure of Humphrey House) (40.05%), and an overspend of 3KP rents £50k (6.95%).

- Street Scene Maintenance – is forecast to underspend by £279k (5.33%) which is mainly driven by forecast underspends within the Street Lighting function due to a mix of reduced prices and efficiency savings due to the introduction of LED upgrades £235k (15.30%).
- The Wellness service is forecast to overspend by £186k (8.33%) of which is mainly driven by under-recovery of income of £219k (9.22%). Staffing costs are underspending by £205k (9.41%) but this is offset by £125k of agency costs.
- Waste, Transport and Stores is forecast to underspend by £87k mainly due to:
 - The Transport service is forecasting an overspend on vehicle hire £150k (79.16%).
 - The Waste service is forecast to underspend on Diesel Engine Road Vehicle (DERV) £251k (36.95%).
- There is an overspend of £196k made up of individual variances below £100k.

Underspending budgets totalling £408k within the Operations Department have been re-purposed to fund initiatives to include an additional Waste crew; additional gully cleaning staff; weed spraying; sweeping of footpaths; making 2 fly tipping enforcement officers' permanent. the purchase of an additional refuse collection vehicle; the continuation of the removal of trees affected by Ash Die Back; deep cleansing and removal of fly tipping; Health & Safety validation work and the extension of the Green Spaces volunteer co-ordinator and Lead Engineer roles.

2024/25 Forecast Capital Outturn

10. The Capital Programme is set on a three-year rolling basis and the programme for 2024/2025 to 2026/2027 was approved by Budget Council in February 2024, as follows:

2024/25	£146.928m
2025/26	£75.665m
2026/27	£21.701m

11. At the 16 July 2024 Cabinet meeting, a further £23.419m of slippage from 2023/24 was added to the 2024/25 programme, to increase the 2024/25 Capital Programme to £170.347m, this includes an overall borrowing requirement of £47.553m. The first update of the financial year on the capital programme necessarily requires a review of phasing to reflect the impact of slippage from the previous financial year and a re-assessment of what is deliverable in the current financial year.
12. For quarter 1, project managers have continued to review their respective capital schemes and have provided scheme updates and re-phased schemes into future

years of the Capital Programme to match the anticipated timing of spend, due to more up to date information on delivery timeframes becoming available.

13. As a result of the in-year reviews, it is proposed that the 2024/25 Capital Programme of £170.347m be revised down to £90.312m, a net reduction of £80.034m, this includes in-year updates of £1.709m and re-phasing of £78.325 into 2025/26, as shown in the table below.

	2024/25			
	Approved Programme FEB24	Slippage from 2023/24	Proposed In-Year Programme Updates	Revised Programme
	£m	£m	£m	£m
Capital Programme				
Regeneration and Economic Growth	£51.786	£5.133	(£25.867)	£31.052
Open Spaces	£2.952	£0.732	(£1.625)	£2.058
Sports and Leisure	£1.773	£0.798	£0.373	£2.943
Operational Fleet	£0.000	£1.109	(£0.997)	£0.112
ICT and Digital	£0.000	£0.055	£0.710	£0.765
Highways	£30.963	£5.375	(£19.679)	£16.659
Children and Young People	£26.866	£6.654	(£27.975)	£5.546
Property	£3.148	£0.938	(£2.979)	£1.107
Older People	£0.128	£0.067	(£0.148)	£0.047
Housing GF	£6.107	(£0.251)	(£1.345)	£4.511
Climate Change	£0.123	£0.016	(£0.098)	£0.041
GF EXPENDITURE TOTAL	£123.846	£20.625	(£79.630)	£64.841
HRA EXPENDITURE TOTAL	£23.082	£2.794	(£0.405)	£25.471
TOTAL COUNCIL EXPENDITURE	£146.928	£23.419	(£80.034)	£90.312
Financing the Capital Programme				
Prudential Borrowing	£44.209	£3.344	(£20.758)	£26.795
External Funding	£75.001	£15.941	(£59.882)	£31.060
Capital Receipts	£3.853	£0.484	£0.726	£5.063
General Fund RCCO	£0.783	£0.856	£0.284	£1.923
GF FINANCING TOTAL	£123.846	£20.625	(£79.630)	£64.841
HRA External Funding / Capital Receipts	£2.000	£0.000	£0.000	£2.000
Housing Revenue Account DRF/MRR	£21.082	£2.794	(£0.405)	£23.471
TOTAL FINANCING	£146.928	£23.419	(£80.034)	£90.312

14. The re-phasing of £78.325m into 2025/26 mainly relates to the schemes listed below:

- £14.929m Radcliffe Regeneration (Levelling-Up Scheme)
- £5.331m Radcliffe Enterprise Centre
- £5.602m Bury Flexi Hall (Levelling-Up Scheme)
- £1.419m Springwater Park & Ash Die Back Tree Felling
- £997k Vehicle Replacement Strategy
- £6.480m Mayor Challenge Fund
- £2.808m Active Travel Fund
- £7.383m City Region Sustainable Transport Settlement (CRSTS)
- £2.089m Milltown Street Footbridge
- £22.098m Schools DFE Funding
- £3.855m Property Development and Admin Building

- £1.324m Disabled Facilities Grant

15. Whilst no variance is being reported at quarter 1 due to the re-phasing of the Capital Programme, the table below shows expenditure of £13.338m (15%) of the revised programme £90.312m has been expended.

	2024/25	In-Year Performance Q1			
	Revised Programme	Actual Spend	Actual Spend	Forecast Outturn	Forecast (Under) / Over Spend
	£m	£m	%	£m	£m
Capital Programme					
Regeneration and Economic Growth	£31.052	£5.303	17%	£31.052	£0.000
Open Spaces	£2.058	£0.198	10%	£2.058	£0.000
Sports and Leisure	£2.943	£1.413	48%	£2.943	£0.000
Operational Fleet	£0.112	(£0.026)	-24%	£0.112	£0.000
ICT and Digital	£0.765	£0.072	9%	£0.765	£0.000
Highways	£16.659	£2.170	13%	£16.659	£0.000
Children and Young People	£5.546	£0.650	12%	£5.546	£0.000
Property	£1.107	£0.328	30%	£1.107	£0.000
Older People	£0.047	£0.047	100%	£0.047	£0.000
Housing GF	£4.511	£0.683	15%	£4.511	£0.000
Climate Change	£0.041	£0.001	3%	£0.041	£0.000
GF EXPENDITURE TOTAL	£64.841	£10.839	17%	£64.841	£0.000
HRA EXPENDITURE TOTAL					
	£25.471	£2.499	10%	£25.471	£0.000
TOTAL COUNCIL EXPENDITURE	£90.312	£13.338	15%	£90.312	£0.000
Financing the Capital Programme					
Prudential Borrowing	£26.795			£26.795	£0.000
External Funding	£31.060			£31.060	£0.000
Capital Receipts	£5.063			£5.063	£0.000
General Fund RCCO	£1.923			£1.923	£0.000
GF FINANCING TOTAL	£64.841			£64.841	£0.000
HRA External Funding / Capital Receipts	£2.000			£2.000	£0.000
Housing Revenue Account DRF/MRR	£23.471			£23.471	£0.000
TOTAL FINANCING	£90.312			£90.312	£0.000

Links with the Corporate Priorities:

16. Financial management is a key part of the council's overall governance and control arrangements and the close monitoring of agreed income and expenditure; revised forecasts of future budget pressures and opportunities; and regular reporting of these issues underpin the council's three clear corporate priorities as set out in the Let's Do It Strategy that will deliver financial sustainability for the Council.

Equality Impact and Considerations:

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

- A public authority must, in the exercise of its functions, have due regard to the need to:
 - a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
 - b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
 - c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

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

Environmental Impact and Considerations:

19. This is a finance update report as such there are no environmental impacts associated with this report.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The Council has insufficient funds to support its expenditure.	Regular reporting and tight budgetary control by budget holders support the Council in managing the overall financial risks and financial planning for the Council.

Legal Implications:

20. There are no legal comments, this report is an updating report to Members on the Council's budget position

Financial Implications:

21. The financial implications are set out within the Report.

Appendices:

Background papers:

Please list any background documents to this report and include a hyperlink where possible.

[The Council's Revenue Budget and Medium Term Financial Plan](#)
[Budget Update Report](#)

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

Term	Meaning
MTFS	Medium Term Financial Strategy



Classification: Open	Decision Type: Key
--------------------------------	------------------------------

Report to:	Cabinet	Date: 25 September 2024
Subject:	Unit 4 Contract	
Report of	Cabinet Member for Finance and Transformation	

Summary

1. The Council's current Enterprise Resource Planning (ERP) Financial Management system is supplied by Unit 4 (formerly Agresso Business World Software). The initial contract was signed back in 2004 and implemented for use by the Council from April 2006 onwards.
2. In October 2023, Unit 4 wrote to inform all customers of their strategic decision to provide only a SaaS (Software as a Service) solution with effect from 1 January 2025. Additionally, existing on-premises solutions will only remain fully supported by Unit 4 until 31 December 2024, unless the Council informs Unit 4 by 31 December 2024 of their intention to move to the Cloud, in which case a 2-year grace period will be given to enable the Council to transition to the Cloud, subject to the Council renewing their existing contract before 31 December 2024.
3. Following initial discussions with the Unit 4 Account Manager on the options available to the Council and future pricing, it was decided to undertake an 'Optimisation Review' of the current system, this required bringing on-board a strategic partner to provide consultancy support to undertake the 'Optimisation Review'.
4. The move to a new cloud-based Unit 4 ERP Financial Management System is a key part of the Council's transformation and improvement journey, building on improvements already made through the adoption of Let's do it principles and implementation of the digital strategy, including the roll-out of Microsoft 365 council wide, the upgrade of I-Trent and rationalisation of applications and migration. Some of the anticipated benefits of the Unit 4 upgrade are outlined in the report and will both directly support and enable the transformation of the finance service as well as providing much more efficient and effective ways of working for the council as a whole, with the detailed business case in the process of being completed.

Recommendation(s)

5. Cabinet is asked to:
 - Approve the direct award of a contract to Unit 4 through the Crown Commercial Services (CCS) G-Cloud 13 framework for the continued use of the Unit 4 Enterprise Resource Planning (ERP) Financial Management

System for a period of three years from 1st January 2025 with the option to extend for a further period of one year at the discretion of the Council.

- Delegate finalisation of the terms of the direct award including any clarifications to the Director of Law and Democratic Services in consultation with the Director of Finance and the Cabinet Member for Finance and Transformation.

Reasons for recommendation(s)

6. The Council has a legal obligation to have in place a financial management system to ensure that appropriate accounting records, management accounting functions and financial controls are in place so that finances are kept under review on a regular basis.

Alternative options considered and rejected

7. Alternative options were considered but rejected as follows:
 - The 'do nothing' option, is not an option due to Unit 4 not supporting the current on-premises solution from 1 January 2025.
 - The implementation of a new Financial Management System was rejected on the basis that the time & cost to undertake a full tender process, appoint a strategic partner, the internal resources required to implement a new financial system, along with the risks & potential cost overruns involved with implementing a new Financial Management System as experienced by other Local Authorities, outweigh the option of renewing & improving the existing Financial Management System,.

Report Author and Contact Details:

Name: Neil Kissock

Position: Director of Finance (Section 151 Officer)

Department: Corporate Core Services

E-mail: N.Kissock@bury.gov.uk

Background

8. The Council has a legal obligation to have in place a financial management system to ensure that appropriate accounting records, management accounting functions and financial controls are in place so that finances are kept under review on a regular basis.
9. The Accounts and Audit Regulation requires that:
 - a) The accounting records of the authority are kept up to date and contain:
 - (i) entries from day to day of all sums of money received and expended by the authority and the matters to which its income and expenditure or receipts and payments relate; and

- (ii) a record of the assets and liabilities of the authority.
- b) Financial controls measures are in operation:
 - (i) to ensure that the financial transactions of the authority are recorded as soon as, and as accurately as, reasonably practicable.
 - (ii) to enable the prevention and the detection of inaccuracies and fraud, and the reconstitution of any lost records; and
 - (iii) to ensure that risk is appropriately managed.
- 10. In October 2023, Unit 4 wrote to inform all customers of their strategic decision to provide only a SaaS (Software as a Service) solution with effect from 1 January 2025. This means that all customers of Unit 4 will be required to move from an on-premises solution i.e. that is currently held on the Council's servers and IT infrastructure to being held in a Unit 4 cloud-based solution.
- 11. Additionally, existing on-premises solutions will only remain fully supported by Unit 4 until 31 December 2024, unless the Council informs Unit 4 by 31 December 2024 of their intention to move to the Cloud, in which case a 2-year grace period will be given to enable the Council to transition to the Cloud, subject to the Council renewing their existing contract before 31 December 2024.
- 12. Following initial discussions with the Unit 4 Account Manager on the options available to the Council and future pricing, it was decided to undertake an 'Optimisation Review' of the current system, but due to the capacity, resource & skills required to undertake such an exercise a strategic partner was appointed to provide consultancy support to undertake the review. Using the G-Cloud framework DWilde Consulting Limited were awarded the contract to undertake the 'Optimisation Review', findings report and the development of a roadmap for the Unit 4 ERP Cloud migration.
- 13. Whilst the Strategic Partner primary objective of the 'Optimisation Review' was to set out the requirements for a new cloud-based Unit 4 ERP Financial Management System. The scope also covered the identification of improvement and transformation opportunities through moving to the cloud that could unlock efficiencies across the finance service and the wider Council.
- 14. The assessment undertaken for the 'Optimisation Review' included the following components:
 - An organisational and service assessment, assessing the current service delivery model and the organisational structure and service performance.
 - A high-level assessment of commissioning and procurement to assess its current position and understand areas for improvement.
 - Financial assessment based upon the engagement and discovery workshops and meetings with the staff and service to understand ways of working operational processes and opportunities for improvement.
 - Technical assessment, following the readiness assessment undertaken by Unit4 to identify the gaps and future requirements for a cloud-based unit for ERP financial management system.

15. The Strategic Partner identified many specific technical observations recommendations and improvements in their report, but the following are a high-level summary of the key recommendations:

- **Technical Enhancements:**

- Migrate to Unit4 Cloud ERP, ensuring all necessary integrations and customisations are in place.
- Fully utilise the functionalities of the Unit4 ERP system, including modules for commitment accounting, contract management, and workflow enhancements.
- Implement robust data governance policies and role-based access controls.
- Develop comprehensive end-user and system administration documentation and training materials.

- **Organisational Changes:**

- Restructure the finance service to create distinct strategic, operational, and business partnering roles that clarify responsibilities and create clear career development routes.
- Strengthen the overall management capacity to support financial and wider cross-council transformation.
- Invest in training and professional development to build a skilled and agile workforce.
- Consolidate Debt Management to harmonise processes and management risk.

- **Process Redesign:**

- Improve ways of working through the utilisation of the new Unit4 ERP functionalities
- Standardise and streamline workflows, especially for journal entries, budget setting, and financial reporting.
- Fully document processes and ways of working to ensure standardisation, financial resilience and clear auditable trails
- Automate financial processes such as purchase-to-pay (P2P) and order-to-cash (O2C) to reduce manual intervention.

- **Governance, Reporting and Compliance:**

- Implement a new Chart of Accounts to fully optimise the functionalities of the Unit4 ERP
- Establish a Financial Governance Board to oversee financial management and ensure compliance with statutory requirements.
- Produce real-time, on-system reports to ensure consistency and accessibility of financial data.
- Upgrade all reports to meet mandatory standards and enhance their usability for different stakeholders.
- Regularly review and update financial policies and procedures.

- **Self-Service and Automation:**

- Implement self-service tools and portals for employees and department heads to access financial data independently.

- Explore robotic process automation (RPA) and artificial intelligence (AI) to further enhance efficiency.
 - **Data Quality and Management**
 - Enforce data quality controls across all financial transactions and reporting streams.
 - Use advanced tools for data anonymisation and transformation to ensure accuracy and compliance with GDPR.
16. Implementing these recommendations would involve streamlining financial processes, implementing new ways of working, improving financial reporting, enhancing budgeting and forecasting capabilities, and increasing financial transparency and accountability. Through process automation, implementing Unit4 Financial Planning & Analysis module and employee and supplier self-service, whilst strengthening governance & internal controls and achieving compliance with audit recommendations & regulatory standards.
17. The Strategic Partner report assessed the limitations of the existing Unit 4 ERP Financial Management System, which is nearing the end of its life, identified substantial opportunities for improvements and financial transformation and provided a roadmap for implementing a new Unit4 ERP Finance Management System over the next 18-24 months.
18. A final piece of work is currently being undertaken by the Strategic Partner to develop the Strategic Outline Business Case (SOBC) into a detailed Business Case supported by an implementation plan which will enable the Council to progress to implementation of the Finance Transformation Programme and outlining the cost/benefits.
19. A report summarising the Business Case will be brought to November Cabinet meeting requesting approval of the investment required to deliver the Finance Transformation Programme.

Links with the Corporate Priorities:

Please summarise how this links to the Let's Do It Strategy.

20.

Equality Impact and Considerations:

*Please provide an explanation of the outcome(s) of an initial or full EIA and make **specific reference regarding the protected characteristic of Looked After Children**. Intranet link to EIA documents is [here](#).*

21.

Environmental Impact and Considerations:

Please provide an explanation of the Environmental impact of this decision. Please include the impact on both **Carbon emissions** (contact climate@bury.gov.uk for advice) and **Biodiversity** (contact c.m.wilkinson@bury.gov.uk for advice)

22.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation

Legal Implications:

To be completed by the Council's Monitoring Officer.

23. The Crown Commercial Services (CCS) G-Cloud 13 Framework is an online catalogue where public sector customers can buy cloud-based computing services such as hosting, software and cloud support. The framework allows access to a range of contractors which have already undergone a competitive process in respect of both price and quality.
24. Direct award is permissible in this case under the exemption provided in Regulation 32 (5) (b) of the Public Contracts Regulations 2015. This applies where the supply of additional services or systems by the original supplier is a partial replacement or extension of existing services or systems, and a change of supplier would result in the Council suffering incompatibility or disproportionate technical difficulties in operation and maintenance.
25. The Framework provides that all call-off contracts awarded through the framework will be for an initial period of up to 36 months, with the option to extend by up to 12 months. The Council must therefore reserve the right to extend in the initial terms of the contract, whilst noting that under Regulation 32 (6) its exercise is only available in exceptional circumstances
26. It is acknowledged that this Report recommends delegation of the finalisation of the terms of the Contract including any clarifications. The form of call-off contract used will be determined by the terms of the Framework.

Financial Implications:

To be completed by the Council's Section 151 Officer.

27. The financial implications are set out in Part B of the agenda which is deemed to be exempt from publication.
-

Appendices:

Please list any appended documents.

Background papers:

Please list any background documents to this report and include a hyperlink where possible.

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

Term	Meaning

This page is intentionally left blank



Classification: Open	Decision Type: Non-Key
--------------------------------	----------------------------------

Report to:	Cabinet	Date: 25th September 2024
Subject:	Establishing a Bury Local Bee Network Forum	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1. This report sets out a proposal to establish a Bury Local Bee Network Forum to ensure that the coordination and development of the Bee Network, Greater Manchester's vision for a joined-up travel network that works for everyone, is informed by Bury's local views and priorities.

Recommendation(s)

2. It is recommended that Cabinet:
 - i. Note the establishment of a Bury Local Bee Network Forum.

Reasons for recommendation(s)

3. Establishing a Bury Local Bee Network Forum will help to ensure that the Bee Network meets Bury's local needs and priorities as it develops. It will also provide a Forum where local transport issues can be raised and where the impact of, and opportunities arising from, decisions made by the GM Bee Network Committee can be considered. It will also provide a Forum where consultations on local and city-region transport matters can be considered.
4. The Greater Manchester Bee Network Committee has recommended that all GM Local Authorities establish a Forum in their areas to ensure better control and coordination over deployment of services across the Bee Network.

Alternative options considered and rejected

5. No other options were considered/were applicable.

Report Author and Contact Details:

Name: Joanne Betts
Position: Strategic Transport Lead
Department: Business, Growth and Infrastructure
E-mail: j.betts@bury.gov.uk

Background

6. The Bee Network is Greater Manchester's ambitious plan for an integrated, low-cost, high-frequency public transport network, bringing together local trams, buses and hire bikes – and ultimately local train services – with the largest walking, wheeling and cycling network in the country.
7. It was launched in September 2023 with the introduction of Greater Manchester's first franchised bus services which started running in Bolton, Wigan and parts of Salford and Bury. By March 2024, all Bury's bus services were part of the franchise scheme. By January 2025, all Greater Manchester's bus services will be part of the franchised Bee Network.
8. The Greater Manchester Combined Authority (GMCA) has put new governance arrangements in place to support the development of the Bee Network by establishing a new Bee Network Committee to lead transport decision-making at a regional level and take greater ownership and responsibility for Greater Manchester's integrated transport network. The GM Bee Network Committee has replaced the former Greater Manchester Transport Committee.
9. The GM Bee Network Committee has an important role in developing transport policy, and advising and supporting the Constituent Councils, the GMCA and the GM Mayor on specific transport issues. By establishing a Bury Local Bee Network Forum, Bury Council can ensure that as the Bee Network develops it does so in a way that best meets local needs and priorities and supports our ambitious growth plans and Let's Do It vision of faster economic growth than the national average, with lower than national average levels of deprivation. As part of the Northern Gateway proposal, for example, we need to ensure that there are new high-frequency Bee Network bus services connecting residents directly to new employment opportunities.
10. The Bee Network must develop in a way that helps deliver our Local Transport Strategy vision by providing Bury residents with safe, reliable and affordable access to key services and employment opportunities in the Borough and beyond by public transport, walking wheeling or cycling. Having a Local Bee Network Forum will ensure that voice of Bury residents is heard and can help to inform and influence the development of the Bee Network.
11. The Forum could get involved in reviews of the franchised bus network as they relate to the Borough. TfGM are carrying out a series of Network Reviews to better understand bus services across the city-region so that they can better plan the bus network. They are seeking community feedback to help identify opportunities for change and improvement. A review of Bury's

Bee Network Bus Services began in August 2024, with community feedback being sought by the end of October. This is the first stage of the process and TfGM will continue to engage with stakeholders as they develop the review through the subsequent stages of the overall process. In addition to reviews based on geographical areas of Greater Manchester, a programme of thematic reviews – for example, opportunities for night-buses, orbital services, or priority routes – also gets underway from January 2025.

12. The Forum will also be a place where transport issues can be raised and where the impact of, and opportunities arising from, the transport policies developed by the GM Bee Network Committee can be considered. Having the Bury Council appointment/substitute Member appointment to GMCA Bee Network Committee on the Bury Local Bee Network Forum will ensure there is a clear connection between the GM Committee and the Local Forum. Local member input into the Bee Network Committee could be collated by the Forum.
13. It is expected that consultations on local and city-region can be considered at the Forum, and draft policies and strategies could be debated. The Forum could, for example, provide a response to the consultation on the draft updated GM Transport Strategy 2040, which is expected to go live early next year.

The Bury Local Bee Network Forum

14. The Bury Local Bee Network Forum will be a non-decision making body. The draft Terms of Reference for Bury's Local Bee Network Forum are attached in Appendix 1, with the key principles set out below:

Core Membership

15. The Bury Local Bee Network Forum will have a core membership of 5 elected members, to be appointed on a politically balanced basis. Forum Members will be made up of Members (three Labour and one from each of the opposition groups).
16. Members of the Forum will be required to attend training to assist in undertaking the role of a Forum member.

Additional membership

17. All elected members will have a standing invite to Forum meetings.
18. Officers leading on Transport, Public Health and Climate Change will also be invited to attend Forum meetings.
19. Membership may also be extended in future to include other stakeholders, such as representatives from local groups or organisations, particularly

groups that represent those who may experience barriers to using Bee Network services or can advise on specific issues.

Chair

20. Forum meetings will be chaired by Cllr Staples-Jones.
21. The Chair may choose to appoint a Vice Chair.
22. In the absence of the Chair or the Vice-Chair, a replacement Chair will be elected for the duration of the meeting.

Meeting arrangements

23. The Forum will meet quarterly.
24. Forum meetings will be held in person and in public.

Conclusion

25. Members are requested to note the establishment of a Bury Local Bee Network Forum as set out above and in Appendix 1 Bury Local Bee Network Draft Terms of Reference.

Links with the Corporate Priorities:

Please summarise how this links to the Let's Do It Strategy.

26. Establishing a Bury Local Bee Network Forum is consistent with the Key Priorities of the Bury 2030 'Let's Do It' Strategy, particularly in terms of ensuring the transport network supports inclusive economic growth and with the principles of taking a local view in ensuring that the needs and priorities of residents are taken into account as the Bee Network develops.

Equality Impact and Considerations:

*Please provide an explanation of the outcome(s) of an initial or full EIA and make **specific reference regarding the protected characteristic of Looked After Children**. Intranet link to EIA documents is [here](#).*

27. Establishing a Bury Local Bee Network Forum will have no negative impacts on equality. The Forum will be open to all elected members meaning that all residents' views and issues can be considered.

Environmental Impact and Considerations:

Please provide an explanation of the Environmental impact of this decision. Please include the impact on both **Carbon emissions** (contact climate@bury.gov.uk for advice) and **Biodiversity** (contact c.m.wilkinson@bury.gov.uk for advice)

28. No material environmental impacts.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
There is a risk that without a Local Network Forum we miss the opportunity for local needs and priorities to inform the development of the Bee Network.	To establish a Bury Local Bee Network Forum
Bee Network Forum meetings are not well attended	The dates and times of Forum meetings will be published in advance.

Legal Implications:

29. It is intended that the Cabinet will establish a Bury Local Bee Network Forum in accordance with the membership and draft terms of reference set out in this report. The Bury Local Bee Network Forum must follow the direction set by it and not exceed the remit it has been given.

Financial Implications:

30. There are no financial implications arising directly from this report.

Appendices:

Appendix 1 Bury Local Bee Network Forum Draft Terms of Reference.

Background papers:

Please list any background documents to this report and include a hyperlink where possible.

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

Term	Meaning
The Bee Network	The Bee Network is Greater Manchester's vision for a joined-up travel network that works for everyone. The Bee Network is making it easier to get around by bus, tram, train, walking, wheeling or cycling.

Bee Network Reviews	These are evidence-based reviews of franchised Bee Network bus services being undertaken by Transport for Greater Manchester to help them identify opportunities for change and improvement.
Bus franchising	Bus franchising is the system through which Greater Manchester's bus network is being brought back under public control. Transport for Greater Manchester (TfGM), on behalf of Greater Manchester Combined Authority (GMCA), will plan and co-ordinate services. It means fares, timetables and routes will be set by the GM local authorities instead of private companies.

Title	Bury Local Bee Network Forum
Function/Purpose	<ul style="list-style-type: none"> • Accountability: To be accountable to residents and the Bee Network Committee for transport matters in their local area and vice versa. • Feedback: To actively monitor the delivery and performance of services linked to the Bee Network and as appropriate recommend change/improvement to the Bee Network Committee through the local Transport Lead Member/Representative. • Participation: Provide robust mechanisms for elected members and service users to feedback through regular participation at local Bee Network forums. • Local Co-ordination: Identify how issues arising at the Bee Network Committee might impact and be mitigated or responded to in the local area. • Policy Development: Support and contribute to policy development and strategy delivery linked to the Bee Network. • Cross Cutting Analysis: Analyse cross-cutting issues that may affect GM's ability to deliver an efficient service. For instance, through improved co-ordination of roadworks to ensure disruption are kept to a minimum.
Statutory/Decision Making/Informal	The Bury Local Bee Network Forum will be a formal non-decision making body.
Core Membership	<p>The Bury Local Bee Network Forum will have a core membership of 5 elected members and be politically balanced. Forum Members will be:</p> <ul style="list-style-type: none"> • Labour x3 • Conservative x1 • Radcliffe First x1

	<p>Core members of the Forum will be required to attend training to assist in undertaking the role of a Forum member.</p>
<p>Additional membership</p>	<p>All elected members will have a standing invite to Forum meetings.</p> <p>The following officers will also be invited attend the Forum:</p> <ul style="list-style-type: none"> • Bury Council's GM Transport Strategy Group Representatives (Joanne Betts / Natalie Blackston • Lee Buggie, Public Health Specialist, Bury Council. • Council officers – As required <p>Membership may also be extended in future to include other stakeholders, such as representatives from local groups or organisations, particularly groups that represent those who may experience barriers to using Bee Network services, or to advise on specific issues.</p>
<p>Chair</p>	<p>Forum meetings will be chaired by Cllr Gareth Staples Jones</p> <p>The Chair may choose to appoint a Vice Chair.</p> <p>In the absence of the Chair or the Vice-Chair, a replacement Chair will be elected for the duration of the meeting.</p>
<p>Meeting arrangements</p>	<p>The Forum will meet quarterly.</p> <p>Forum meetings will be held in person and in public.</p> <p>The agenda and supporting papers will be in a standard format and circulated at least five clear working days in advance of meetings.</p>

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

Document is Restricted

This page is intentionally left blank

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

Document is Restricted

This page is intentionally left blank

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

Document is Restricted

This page is intentionally left blank

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

Document is Restricted

This page is intentionally left blank