

**Lynne Ridsdale**  
**Chief Executive**

|                    |                                                                  |
|--------------------|------------------------------------------------------------------|
| <i>Our Ref</i>     | C/RE                                                             |
| <i>Date</i>        | 8 September 2026                                                 |
| <i>Contact</i>     | Rachel Everitt                                                   |
| <i>Direct Line</i> | 0161 253 5103                                                    |
| <i>E-mail</i>      | <a href="mailto:r.everitt@bury.gov.uk">r.everitt@bury.gov.uk</a> |
| <i>Web Site</i>    | <a href="http://www.bury.gov.uk">www.bury.gov.uk</a>             |

**TO: All Members of Council**

**Councillors :** A Arif, S Arif, N Bayley, C Birchmore, C Boles, A Booth, A Chaudhry, P Davies, D Duncalfe, U Farooq, E FitzGerald, I Gartside, R Gold, D Green, S Haroon, M Hayes, D Hill, J Hook, C Hunt, K Hussain, B Ibrahim, J Lancaster, G Martin, G McGill, C Morris, E O'Brien, T Pilkington, A Quinn, D Quinn, T Rafiq, M Rahimov, I Rizvi, J Roith, M Rubinstein, J Rydeheard, L Ryder, S Shamim, J Sheppard, K Simpson, L Smith, M Smith, J Southworth, J Southworth, G Staples-Jones, T Tariq, S Thorpe, D Vernon, S Walmsley, M Walsh, Y Wright and S Zaman

Dear Member/Colleague

## **Council**

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

|                             |                                                                                                                                                               |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Date:</b>                | Wednesday, 16 September 2026                                                                                                                                  |
| <b>Place:</b>               | Bury Town Hall                                                                                                                                                |
| <b>Time:</b>                | 7.00 pm                                                                                                                                                       |
| <b>Briefing Facilities:</b> | If Members require briefing on any particular item on the Agenda, the appropriate Director/Senior Officer originating the related report should be contacted. |
| <b>Notes:</b>               | <b>There is an all councillor briefing from the Bee Network starting at 5.30pm in the Peel Room.</b>                                                          |

## **AGENDA**

The Agenda for the meeting is attached.

The Agenda and Reports are available on the Council's Intranet for Councillors and Officers and also on the Council's Website at [www.bury.gov.uk](http://www.bury.gov.uk)

**Yours sincerely**

A handwritten signature in dark ink, appearing to read 'Widdale', is written over a light grey rectangular background.

**Chief Executive**

**(Note: Members are reminded that under Section 106 of the Local Government Finance Act 1992, if a Member of a Local Authority has not paid Council Tax for at least two months and, even if an arrangement has been entered into to pay arrears, then at any meeting where consideration is given to matters relating to, or which might affect the calculation of Council Tax, that Member must declare the fact that he/she is in arrears and must not vote on the matter).**

## AGENDA

### 1 APOLOGIES FOR ABSENCE

### 2 DECLARATIONS OF INTEREST

Members of the Council are requested to declare any interests which they have in any items or issues before the Council for determination.

### 3 MAYORAL COMMUNICATIONS AND ANNOUNCEMENTS

To receive communications from the Mayor and any announcements by the Leader of the Council or the Chief Executive on matters of interest to the Council.

### 4 MINUTES (Pages 7 - 10)

Minutes attached.

### 5 PUBLIC QUESTION TIME

To answer questions from members of the public, notice of which has been given, on any matter relevant to the Council or its services to the community. Up to 30 minutes will be set aside for this purpose. If time permits, further questions will be invited from members of the public present.

### 6 RECOMMENDATIONS OF CABINET AND COUNCIL COMMITTEES

| Committee/Date                               | Subject                                            | Recommendation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------------------------------------|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Housing Advisory Board, 9 June 2026          | Terms of Reference                                 | To approve the amended Terms of Reference                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Audit Committee, 22 July 2026                | Financial Procedure Rules and Scheme of Delegation | To approve the amended Financial Procedure Rules and Scheme of Delegation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Planning Control Committee, 1 September 2026 | Scheme of Delegation                               | Planning Control Committee: <ul style="list-style-type: none"><li>• Notes the introduction of the Town and Country Planning (Discharge of Local Planning Authority Functions) (England) Regulations 2026 which come into force on 31st October 2026; and</li><li>• Notes that the Regulations introduce a National Scheme of Delegation which all relevant local planning authorities in England must follow, by law; and</li><li>• Notes that the Council will need to update its Constitution, Planning Scheme of Delegation and associated Planning Control Committee procedures to ensure compliance with the Regulations; and</li><li>• Notes that the formal decision to amend the</li></ul> |

|                                                 |                                  |                                                                                                                                                                                                         |
|-------------------------------------------------|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                 |                                  | Constitution will need to be made via Full Council and that the matter is referred to Full Council for consideration at their meeting on 16th September 2026.                                           |
| Democratic Arrangements Forum, 9 September 2026 | Motions at full council meetings | To approve: <ul style="list-style-type: none"> <li>- Main party and opposition party having a motion at each council meeting</li> <li>- The final motion being rotated between other parties</li> </ul> |

a **HOUSING ADVISORY BOARD TERMS OF REFERENCE** (Pages 11 - 18)

Report from Sian Grant Director of Housing attached.

b **FINANCIAL PROCEDURE RULES AND SCHEME OF DELEGATION** (Pages 19 - 92)

Report from S.151 Officer

c **The National Scheme of Delegation- For Planning Decision Making** (Pages 93 - 120)

A report from the Head of Development Management on the implementation of the National Scheme of Delegation for the determination of Planning Applications is attached.

7 **LEADER' STATEMENT AND CABINET QUESTION TIME** (Pages 121 - 124)

To receive a report from the Leader of the Council on the work of the Cabinet and to answer written questions from Members of the Council to the Leader, Cabinet Members and Chair of a Committee on any matter in relation to which the Council has powers or duties which affect the Borough, provided the necessary written notice has been given. (30 minutes)

A member may ask a verbal question of the Leader, any Member of the Cabinet or Chair of a Committee about any matter on the Council agenda and which the Council has powers or duties or which affects the Borough. Only one verbal question per Councillor. (15 minutes)

8 **COMBINED AUTHORITY REPORT AND QUESTIONS TO THE COUNCIL'S COMBINED AUTHORITY REPRESENTATIVES** (Pages 125 - 134)

(A) A combined authority update report is attached, for information

(B) Questions (if any) on the work of the Combined Authority to be asked by Members of the Council for which the necessary notice has been given in accordance with Council Procedure Rules.

9 **NOTICES OF MOTION** (Pages 135 - 140)

10 **COUNCIL MOTION TRACKER** (Pages 141 - 148)

A report setting out progress in respect of Motions passed at the last meeting of Council is attached for information.

**11     SCRUTINY REVIEW REPORTS AND SPECIFIC ITEMS "CALLED IN" BY  
         SCRUTINY COMMITTEES**

**12     QUESTIONS ON THE WORK OF OUTSIDE BODIES OR PARTNERSHIPS**

Questions on the work of Outside Bodies or partnerships on which the Council is represented to be asked by Members of the Council (if any).

**13     REPORTING OF URGENT DECISION - MULTIPLE POSTS FOR BEST START  
         FAMILY HUB GUIDANCE   (Pages 149 - 150)**

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**Minutes of:** **COUNCIL**

**Date of Meeting:** 15 July 2026

**Present:** The Worshipful the Mayor (Councillor T Rafiq, in the Chair)  
Councillors A Arif, S Arif, N Bayley, C Birchmore, C Boles,  
A Booth, A Chaudhry, P Davies, D Duncalfe, U Farooq,  
E FitzGerald, I Gartside, R Gold, D Green, S Haroon, M Hayes,  
D Hill, J Hook, C Hunt, K Hussain, B Ibrahim, G Martin,  
G McGill, C Morris, E O'Brien, T Pilkington, A Quinn, D Quinn,  
T Rafiq, M Rahimov, I Rizvi, J Roith, M Rubinstein,  
J Rydeheard, S Shamim, J Sheppard, K Simpson, L Smith,  
M Smith, J Southworth, J Southworth, G Staples-Jones,  
T Tariq, S Thorpe, D Vernon, M Walsh, Y Wright and S Zaman

**Apologies for  
Absence** J Lancaster, L Ryder and S Walmsley

**Public Attendance:** 7 members of the public attended the meeting.

**C. 78 APOLOGIES FOR ABSENCE**

Apologies were received from Councillors Lancaster, Ryder and Walmsley

**C. 79 DECLARATIONS OF INTEREST**

There were no declarations of interest made at the meeting.

**C. 80 MAYORAL COMMUNICATIONS AND ANNOUNCEMENTS**

The Mayor as Bury's first citizen updated Members of the Council on work undertaken since the last meeting.

**C. 81 MINUTES**

The minutes of the two meetings held on 20 May 2026 were approved as a correct record and signed by the Mayor.

**C. 82 PUBLIC QUESTION TIME**

Notice had been received of the following questions:

| Questioner    | Topic                      | Responding           |
|---------------|----------------------------|----------------------|
| Andy Hay      | Prestwich regeneration     | Councillor E O'Brien |
| Nicholas Rose | Footways and Hamilton Road | Councillor L Smith   |
| Jonathan Moss | Barriers in Ramsbottom     | Councillor L Smith   |
| Emma Baxter   | Bury New Road              | Councillor L Smith   |

|                       |               |                       |
|-----------------------|---------------|-----------------------|
| Rebecca Ogujor        | SEND          | Councillor Pilkington |
| Sunil Bhardwaj        | Trees         | Councillor L Smith    |
| John Martins          | Bins          | Councillor L Smith    |
| Sofia Constantnou     | Indoor market | Councillor McGill     |
| Susan Hargreaves      | Indoor market | Councillor McGill     |
| Jennifer Eagle-Cooper | Indoor market | Councillor McGill     |
| Tracey Howarth        | Indoor market | Councillor McGill     |
| Mark Diggle           | Indoor market | Councillor McGill     |
| Chelsea Noone         | Indoor market | Councillor McGill     |

### **C. 83 RECOMMENDATIONS OF CABINET AND COUNCIL COMMITTEES**

The Monitoring Officer advised members that the Democratic Arrangements Forum met to discuss the matter of opposition parties. Leaders agreed that Radcliffe First would remain the official Opposition Party and that Reform would have a member attend opposition briefings. The matter of motions will be discussed at a future Democratic Arrangements Forum

Councillor O'Brien moved the motion, Councillor Birchmore seconded the motion and Councillor Rydeheard confirmed his agreement to the motion.

There were no further recommendations of Cabinet or Council Committees

### **C. 84 CONSTITUTION REPORT UPDATE**

It was moved by Councillor O'Brien, and seconded by Councillor Birchmore and Council agreed to:

Note the updated Members appointments and accept the proposed amendments to Bury Council's Constitution as set out in the report:

### **C. 85 ANNUAL APPOINTMENTS REPORT**

It was moved by Councillor O'Brien, and seconded by Councillor L Smith and Council agreed to:

Note the appointments and amendments to appointments made since the Annual Meeting of Council.

### **C. 86 LEADER STATEMENT AND CABINET QUESTION TIME**

#### **(a) Written questions (Notice given)**

The Leader of the Council, Councillor E O'Brien, made a statement on the work undertaken by him since the date of the last Council meeting.

The Leader and the relevant Cabinet Members answered questions raised by Councillors on the following issues:

|   | <b>Questioner</b> | <b>Cabinet member</b> | <b>Topic</b>                        |
|---|-------------------|-----------------------|-------------------------------------|
| 1 | Cllr M Smith      | Cllr Thorpe           | Councillor casework system          |
| 2 | Cllr Roith        | Cllr McGill           | Market traders                      |
| 3 | Cllr Gartside     | Cllr L Smith          |                                     |
| 4 | Cllr Ibrahim      | Cllr Gold             | Antisocial behaviour awareness week |
| 5 | Cllr Hayes        | Cllr Morris           | Inclusive growth                    |

|    |                |              |                                                  |
|----|----------------|--------------|--------------------------------------------------|
| 6  | Cllr Vernon    | Cllr Gold    | Pilot scheme to encourage resident participation |
| 7  | Cllr Sheppard  | Cllr L Smith | Green space                                      |
| 8  | Cllr Rydeheard | Cllr O'Brien | Scrutiny committee papers                        |
| 9  | Cllr S Arif    | Cllr L Smith | Puffin crossing on Ainsworth road                |
| 10 | Cllr Bayley    | Cllr L Smith | Fly tipping                                      |

The remaining questions submitted by elected members will receive written responses.

### **(b) Verbal questions**

The Leader received verbal questions from the following Councillors:

|   | <b>Questioner</b> | <b>Cabinet member</b> | <b>Topic</b>                                 |
|---|-------------------|-----------------------|----------------------------------------------|
| 1 | Cllr Birchmore    | Cllr O'Brien          | Development frameworks                       |
| 2 | Cllr Rydeheard    | Cllr O'Brien          | Cost of Number 10 North and raising taxes    |
| 3 | Cllr Vernon       | Cllr O'Brien          | Funding and financial support for Bury       |
| 4 | Cllr Wright       | Cllr L Smith          | Drain cover on Market Street                 |
| 5 | Cllr Duncalfe     | Cllr O'Brien          | Bridge over River Irwell                     |
| 6 | Cllr Martin       | Cllr O'Brien          | Turton Road                                  |
| 7 | Cllr Simpson      | Cllr Gold             | Funding for centre for armed forces veterans |

## **C. 87 QUESTIONS TO THE COUNCIL'S COMBINED AUTHORITY REPRESENTATIVES**

The following questions had been received in accordance with Council Procedure rules

|   | <b>Questioner</b> | <b>Cabinet Member</b> | <b>Topic</b>                                       |
|---|-------------------|-----------------------|----------------------------------------------------|
| 1 | Cllr Rydeheard    | Cllr Gold             | FTE Police Officers                                |
| 2 | Cllr Zaman        | Cllr Gold             | Review of GMP guidelines and policies              |
| 3 | Cllr Davies       | Cllr L Smith          | Public services                                    |
| 4 | Cllr Roith        | Cllr Tariq            | Health related incidents during recent hot weather |

## **C. 88 NOTICES OF MOTION**

### **(i) Zero Tolerance on Dodgy Shops**

Council considered a motion in the names of A Arif, N Bayley, C Boles, A Chaudhry, U Farooq, E FitzGerald, R Gold, D Green, S Haroon, M Hayes, J Hook, C Hunt, B Ibrahim, G McGill, C Morris, E O'Brien, T Pilkington, A Quinn, D Quinn, T Rafiq, M Rahimov, I Rizvi, M Rubinstein, L Ryder, L Smith, J A Southworth, J Southworth, G Staples-Jones, T Tariq, S Thorpe, S Walmsley

The motion was moved by Councillor Green and seconded by Councillor Rubinstein and on being put to members with 47 members voting for; the Mayor abstaining, the Mayor declared the motion carried.

### **(ii) Endometriosis friendly employer status**

Council considered a motion in the names of Councillors Carol Birchmore, Des Duncalfe, Judi Sheppard, Ken Simpson, Mike Smith and Mary Walsh

The motion was moved by Councillor Birchmore and seconded by Councillor Walsh and on being put to members with 47 members voting for; the Mayor abstaining, the Mayor declared the motion carried.

**(iii) Castle Armoury**

Council considered a motion in the names of Councillors P Davies, D Hill, G Martin, J Roith, J Rydeheard and S Zaman.

An amended version of this motion was circulated with the council papers that has been agreed with the Leader of Reform. This now forms the substantive motion.

The motion was moved by Councillor Rydeheard and seconded by Councillor Gold and on being put to members with 47 members voting for; the Mayor abstaining, the Mayor declared the motion carried.

**C. 89 SCRUTINY REVIEW REPORTS AND SPECIFIC ITEMS "CALLED IN" BY SCRUTINY COMMITTEES**

There were no questions on the work of outside bodies or partnerships.

**C. 90 QUESTIONS ON THE WORK OF OUTSIDE BODIES OR PARTNERSHIPS**

There were no questions on the work of outside bodies or partnerships.

**THE WORSHIPFUL THE MAYOR**

**(Notes:** Part 1 of the meeting started at Time Not Specified and ended at 3.00 pm  
Part 2 of the meeting started at xxxxx pm and ended at Time Not Specified)

|                               |                                                                                                                                                                                                                                                          |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Report to                     | Housing Advisory Board                                                                                                                                                                                                                                   |
| Date                          | 10/06/2026                                                                                                                                                                                                                                               |
| Agenda No. & Title            | 9 Annual review of HAB Terms of Reference                                                                                                                                                                                                                |
| Purpose of the Report         | To review and discuss any changes to the terms of reference for Housing Advisory Board and to advice of meeting dates for 2026/27                                                                                                                        |
| Status                        | For approval                                                                                                                                                                                                                                             |
| Author                        | Sian Grant<br>Director of Housing                                                                                                                                                                                                                        |
| Report Contact                | Sian Grant<br>Sian.grant@bury.gov.uk                                                                                                                                                                                                                     |
| Appendices                    | Appendix one – HAB terms of reference                                                                                                                                                                                                                    |
| Background Documents          | None                                                                                                                                                                                                                                                     |
| Recommendation/s              | <b>It is recommended that HAB;</b> <ul style="list-style-type: none"> <li><b>Discuss and recommend the revised Terms of Reference to the council for approval</b></li> <li><b>Note the meeting dates for 2026/27</b></li> </ul>                          |
| Corporate Plan Objective      | <input checked="" type="checkbox"/> Satisfied Tenants<br><input checked="" type="checkbox"/> Quality Homes<br><input checked="" type="checkbox"/> United Communities                                                                                     |
| Risk Implications             | H6: Failure to meet governance requirements for STH and BC stock                                                                                                                                                                                         |
| Risk Controls and mitigations | The Housing Advisory Board terms of reference will help mitigate this risk by providing clear structure and rules for the Housing Advisory Board including membership and how the Housing Advisory Board fits in the wider council governance structure. |
| Assets and Liabilities        | None as a result of this report                                                                                                                                                                                                                          |
| Resource Implications         | None as a result of this report                                                                                                                                                                                                                          |
| Customer Impact               | The terms of reference ensure that the tenant voice is heard at a strategic and decisions making level within housing services and that the tenants are able to influence the delivery of services. The terms of                                         |

|                                                    |                                                                                                                                                                                                            |
|----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                    | reference also ensure that the tenant's voice is represented on HAB and is able to represent the views of tenants at a strategic level.                                                                    |
| EDI Implications                                   | None as a result of this report                                                                                                                                                                            |
| Sustainability and Environmental Implications      | None as a result of this report                                                                                                                                                                            |
| Privacy/Data Protection                            | None as a result of this report                                                                                                                                                                            |
| Colleague Impact                                   | None as a result of this report                                                                                                                                                                            |
| Stakeholder Communications and Reputational Impact | The terms of reference ensure that the work of HAB will be shared with all councillors and tenant organisation. The meeting papers and minutes of the meetings will be published on the council's website. |
| Next Steps                                         | To report any changes to the terms of reference to the council for approval.                                                                                                                               |

## 1 Background

- 1.1 The terms of reference (ToR) for the Housing Advisory Board (HAB) define the purpose and structure of HAB and support the good governance of HAB. They also set out how HAB sits within the Council's wider governance and decision making structure.
- 1.2 The current terms of reference were initially agreed in February 2024 and revised in June 2025 as part of the annual review of the ToR.
- 1.3 The Terms of reference have been reviewed and a number of changes are proposed to make the terms of reference more robust

## 2 Proposed changes

- 2.1 The following changes are proposed to the ToR;
  - Overhaul of the purpose of the Housing Advisory board to make it stronger
  - Overhaul of the role and functions of the Housing Advisory Board to make it clearer and more robust, setting out in detail the role of the Housing Advisory Board and the areas it will cover.
  - Removed reference to the Tenant Voice Forum in relation to tenant members so tenants members can be appointed from the wider tenant

body

- Added in that no more than one tenant member can be a leaseholder.
- Add in more details about the recruitment process.
- Added in more details about meeting arrangements.

2.2 If the Housing Advisory board are happy with the proposed changes, the changes will be reported to council for approval.

### **3 Meeting dates 26/27**

3.1 Below are the dates for the Housing Advisory Board for 2026/27. All meetings are 5pm – 7pm;

- Tuesday 28<sup>th</sup> July 2026
- Thursday 10<sup>th</sup> September 2026
- Wednesday 18<sup>th</sup> November 2026
- Thursday 7<sup>th</sup> January 2027
- Thursday 4<sup>th</sup> March 2027.

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## **HOUSING ADVISORY BOARD TERMS OF REFERENCE**

### **1. Purpose**

The Housing Advisory Board (HAB) is a non-executive advisory body established to:

- Provide strategic advice and assurance to the Cabinet Member for Housing
- Ensure that the voice of tenants and residents informs housing policy, service design and delivery
- Support continuous improvement in housing services in line with the Regulator of Social Housing Consumer Standards

The Housing Advisory Board operates alongside, and does not replace:

- Overview and Scrutiny
- Audit Committee
- Cabinet
- Six Town Housing Board

### **2. Role and Functions**

The HAB will act as a strategic advisory and co-production forum, and will provide:

#### **2.1 Strategic Advice**

- Provide input into the development and review of:
  - Housing Strategy
  - Homelessness Prevention Strategy
  - Asset Management Strategy
  - Tenant Engagement Strategy

#### **2.2 Performance and Assurance**

- Review and provide assurance on:
  - Compliance with Housing Regulatory Standards
  - Tenant Satisfaction Measures (TSMs)
  - Complaints handling performance
  - Building safety and regulatory compliance
  - Delivery of the Housing Revenue Account Business Plan

#### **2.3 Tenant Voice and Engagement**

- Ensure:
  - Tenant feedback is effectively captured and acted upon
  - Diverse tenant voices are represented
  - Co-design principles are embedded in service delivery

#### **2.4 Service Delivery Oversight (Advisory)**

- Consider performance relating to:

- Repairs and maintenance
- Neighbourhood management
- Housing allocations and lettings
- Homelessness prevention

### **2.5 Pre-decision Input**

- Provide early advice on key housing policies prior to Cabinet consideration

## **3. Membership**

Membership of the Board will be as follows:

### **3.1 Core voting members:**

- 5 Elected Members (to include 2 opposition members to sit on the Board)
- Cabinet member for Housing to Chair the Board – this would ensure that the Board would be assured that there is a clear connection between it and Cabinet.
- 4 Tenant members appointed from the wider tenant body (not more than one of which can be a leaseholder)
- 2 Independent Members – one of who should bring skills and experience related to housing, tenancy management and customer service and the other to bring skills and experience related to asset management, repairs and building safety.
- Officers attending on an ex officio basis (Director of Housing Operations, any Council officer as the HAB may require.)

Tenant and independent members will be recruited through an open and transparent process.

For tenant members, the positions will be advertised to the wider tenant body and any tenant who does not have an active Notice Seeking Possession, can apply for the role. Applications will be shortlisted and interviewed based on the tenant member role profile.

For independent members, the positions will be advertised on Greater Jobs and other platforms to attract suitable candidates. Applicants will be shortlisted and interviewed based on the tenant member role profile.

### **3.2 Co-opted Members**

The Board may invite additional participants in a **non-voting advisory capacity** for specific items.

Substitutes are permitted for elected members in line with Council procedures.

### **3.3 Chairing Arrangements**

- The Cabinet Member for Housing will chair the Board
- In their absence, a Chair will be elected from elected members present

## **4. Meetings**

4.1 The Housing Advisory Board will meet every 2 months.

4.2 The date and timings of the meetings will be fixed in advance by the Council, as part of the agreed schedule of meetings.

4.3 Additional meetings may be convened at the request of the Chair, and with the agreement of the Council Leader.

4.4 The meeting will be Chaired by the Cabinet Member for Housing. In the absence of the Chair - A replacement Chair will be elected for the duration of the meeting from the Core Membership.

4.5 A quorum of three will apply for meetings of the Housing Advisory Board including at least one elected member and one other member.

4.6 Members will adhere to the agreed principles of the Council's Code of Conduct.

4.7 Declarations of Interest – Any personal, prejudicial or pecuniary interests held by members should be declared in accordance with the Council's Code of Conduct on any item of business at a meeting, either before it is discussed or as soon as it becomes apparent. Interests which appear in the Council Register of Interests should still be declared at meetings, where appropriate.

4.8 Decisions are to be taken by consensus. Where it is not possible to reach consensus, a decision will be reached by a simple majority of those present at the meeting. Where there are equal votes the Chair of the meeting will have the casting vote, there will be no restriction on how the Chair chooses to exercise his/her casting vote.

4.9 The Director of Housing Operations will act as the lead officer.

4.10 Workload – Work Programme to be determined annually by the Board.

4.11 The agenda and supporting papers shall be in a standard format and circulated at least five clear working days in advance of meetings.

4.12 The work of the HAB will be shared with all Councillors and, tenant organisations and placed on the Council's web site, minutes of the meetings will be shared with all members.

4.13 Meetings will be clerked by a representative of Democratic Services.

4.14 The Board may decide to establish short term task and finish groups to undertake specific pieces of work.

4.15 Members of the Board will be required to attend training to assist in undertaking the role as an advisory Board member.

### **5.1 Review of Terms of Reference**

These Terms of Reference will be reviewed annually to ensure continued effectiveness.

February 2024  
These terms and reference will be reviewed annually  
Revised May 2025 then on May 2026



|                                |                                  |
|--------------------------------|----------------------------------|
| <b>Classification:</b><br>Open | <b>Decision Type:</b><br>Non-key |
|--------------------------------|----------------------------------|

|                   |                                                    |                           |
|-------------------|----------------------------------------------------|---------------------------|
| <b>Report to:</b> | Audit Committee                                    | <b>Date:</b> 22 July 2026 |
| <b>Subject:</b>   | Financial Procedure Rules and Scheme of Delegation |                           |
| <b>Report of</b>  | Director of Finance (S151 Officer)                 |                           |

## Summary

In November 2019, Cabinet received a report on the Council's new constitution. These were formally approved by Council in January 2021. In the report to Cabinet it was stated that 'Contract Procedure rules and Finance Regulations are a technical finance matter and are subject to the review of the statutory finance officer and monitoring officer'. The report also stated that the Audit Committee be authorised to approve further revisions to the rules.

This report sets out the Financial Procedure Rules and the Scheme of Delegation – Financial Limits for consideration by the Committee. Attached to the rules are detailed guidance notes to support budget holders in performing their financial duties.

## Recommendation(s)

1. Approve the Financial Procedure Rules and Scheme of Delegation – Financial Limits appended to this report and recommend their adoption by Full Council
2. Note that the documents will form part of training for budget holders across the Council

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### Report Author and Contact Details:

Name: Neil Kissock

Position: Director of Finance (S151 Officer)

Department: Department for Corporate Core Services

E-mail: N.Kissock@bury.gov.uk

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## Background

- 1.1 Bury's Finance Transformation Programme is currently in progress, targeted with addressing longstanding issues that have limited finance capacity, including weaknesses in the current Unit 4 system and reliance on manual, time-consuming processes. The programme is designed to ensure the upgraded Finance system will be more efficient and user-friendly, while equipping finance with the tools needed to better support budget holders, decision-making, and the council's financial strategy.

- 1.2 The Programme is a key strand of the council's improvement plan that was developed in response to the statutory recommendation received from the external auditors in December 2024.
- 1.3 Any organisation with a large financial turnover needs to lay down the procedures to be observed in its financial dealings. Such procedures are especially necessary in the case of a local authority which is limited by legislation in what it is able to do, is subject to statutory audit and must account for its actions and stewardship to the general public
- 1.4 The purpose of these rules is therefore to set out, for the benefit of members, officers and the public, basic financial rules and guidance in order that everyone works to an approved common standard in the financial dealings of the council.
- 1.5 Given the multitude of improvements to controls and processes emanating from the Transformation Programme, it has been necessary to undertake a complete review and update of the Financial Procedure Rules and Scheme of Delegation in order to ensure that they reflect and support the way we intend to operate in future.

The Financial Procedure Rules and Scheme of Delegation must henceforth be reviewed and updated on an annual basis to safeguard against obsolescence.

- 1.6 A detailed list of the changes made to the Financial Procedure Rules and Scheme of Delegation, and the rationale for the changes, has been attached in Appendix A; the key changes being;
  - Re-appraising our approach to purchasing goods and services, which will deliver efficiency savings as well as increasing compliance and control.
    - We will create a Supplier Catalogue, with the bulk of our expenditure being channelled through this. Prospective suppliers will be subject to stringent security, with our relationship with each supplier being formalised via a mandatory contract, which will assure compliance. Our ability to offer surety of turnover will facilitate the negotiation of savings with suppliers
      - The two proposed exception routes for unplanned spend; Exemption forms for non-urgent spend and Purchase cards for urgent spend, will be subject to rigorous monitoring and controls
  - Approvals have been linked to the organisation's hierarchy, with the system being configured to enforce Segregation of Duties in relation to all transactions
    - No transaction may be raised and approved by the same person; this will assure scrutiny and control over the Council's finances
  - Measures have been put in place to limit in-year Budget virements
    - In year Budget movements can obscure variances to original estimations. Limiting these facilitates analysis of under/over spends in order to augment Bury's business intelligence
- 1.7 The revised Financial Procedure Rules apply to all areas of the Council and should be read in conjunction with the Council's constitution.

1.8 The following documents are attached as appendices to this report for consideration and approval by the Committee:

- Financial Procedure Rules
- Scheme of Delegation – Financial Limits
- Financial Procedure Rules - Guidance Notes

1.9 It is proposed that the documents will support the roll out of budget holder training across the whole of the Council and this will be delivered during the 2026/27 financial year

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

Ensuring a financial framework within which all budget holders and those charged with financial responsibilities can operate within.

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

Please provide an explanation of the outcome(s) of an initial or full EIA.

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 -

- 1 eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
- 2 advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
- 3 foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

The public sector equality duty (specific duty) requires us to consider how we can positively contribute to the advancement of equality and good relations and demonstrate that we are paying 'due regard' in our decision making in the design of policies and in the delivery of services.

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

There are no Environmental impacts

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**Assessment and Mitigation of Risk:**

| <b>Risk / opportunity</b>                                                                                      | <b>Mitigation</b>                                                                        |
|----------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| Lack of governance over financial transactions leading to qualified statutory accounts and Best Value opinion. | Detailed financial rules to support the Council's financial budget and policy framework. |
| Risk of fraud and financial mis-management                                                                     | Updated regulations ensure that there is a strong control environment                    |

**Legal Implications:**

Section 151 of the Local Government Act 1972 requires every authority in England and Wales to make arrangements for the proper administration of their financial affairs and secure that one of their officers has responsibility for the administration of those affairs. This means responsibility for managing the totality of the financial affairs of a local authority in all of its dealings. The Section 151 officer owes a fiduciary duty to the public to carry out those duties effectively and the Financial Procedure Rules and the Scheme of Delegations are essential tools in this process.

**Financial Implications:**

There are no financial implications arising from this report. The proposals underpin the Council's Constitution and Budget and Policy Framework

**Background papers:**

n/a

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

| <b>Term</b> | <b>Meaning</b>                                        |
|-------------|-------------------------------------------------------|
| CIPFA       | Chartered Institute of Public Finance and Accountancy |



# **FINANCIAL REGULATIONS**

## **Financial Procedure Rules and Scheme of Delegation**

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## 1. Financial Procedure Rules

### 1.1. Introduction

These Financial Regulations govern the financial management of the council and may only be amended or varied by resolution of the council. They are one of the council's governing documents and shall be observed in conjunction with the council's Standing Orders.

### 1.2. Purpose

The purpose of these rules is therefore to set out, for the benefit of members, officers and the public, basic financial rules and guidance in order that everyone works to an approved common standard in the financial dealings of the council.

They do not over-ride the requirement to observe statute in everyday matters.

### 1.3. Scope

These Financial Procedure Rules apply to all areas of the council and should be read in conjunction with the rest of the council's constitution.

### 1.4. Emergency Situations

The provision of these rules does not prevent the council acting through the Chief Executive and director(s) from incurring expenditure which is essential to meet any immediate needs created by a sudden emergency or situation relating to Section 138 of the Local Government Act 1972. This is subject to the action being reported as soon as practicable to the appropriate authority

### 1.5. Non Compliance

Any non-compliance with these rules will follow the relevant council performance management procedure and may result in disciplinary action being taken, or criminal investigation as appropriate

### 1.6. Definitions

In these Financial Regulations;

- 'Accounts and Audit Regulations' means the regulations issued under the Accounts and Audit Regulations 2015, the Local Audit and Accountability Act 2014, the CIPFA Code of Practice on Local Authority Accounting, the CIPFA Financial Management Code, the CIPFA Treasury Management Code and the CIPFA Prudential Code or any superseding legislation, unless otherwise specified.
- "Approve" refers to an online action, allowing an electronic transaction to take place.
- "Authorise" refers to a decision by the council, or a committee or an officer, to allow something to happen.
- 'Must' and **bold** text refer to a statutory obligation the council cannot change.
- 'Shall' refers to a non-statutory instruction by the council to its members and staff.

#### 1.7. **S151 Officer Responsibilities**

The Director of Finance (S151 Officer) holds a statutory office, and these regulations apply accordingly. The Director of Finance;

- Acts under the policy direction of the council
- Administers the council's financial affairs in accordance with all Acts, Regulations and proper practices;
- Determines on behalf of the council its accounting records and control systems;
- Ensures the accounting control systems are observed;
- Ensures the accounting records are kept up to date;
- Seeks economy, efficiency and effectiveness in the use of council resources; and
- Produces financial management information as required by the council.

#### 1.8. **Council Responsibilities**

The council must not delegate any decision regarding:

- **Approving the budget and policy framework and the precept (council tax requirement);**
- **Approval of the Treasury Management Strategy and prudential indicators**
- **The outcome of a review of the effectiveness of its internal controls**
- **Approval to borrow in order to fund new Capital or Revenue initiatives; and**
- **Addressing recommendations from the internal or external auditors**

#### 1.9. **Report Approvals**

The S151 Officer or nominated officer or a nominated representative must approve all financial implications on all decision reports and the relevant implications section of the report template must be completed.

#### 1.10. **Internal Audit**

The S151 Officer or nominated officer shall in accordance with the Global Internal Audit Standards in the UK Public Sector and relevant CIPFA public sector application guidance, arrange for a continuous and current internal audit of all activities of the council

Internal Audit may provide assurance and advisory work, subject to safeguards for independence and objectivity

**1.11. Financial Irregularities**

Where matters arise which involve or are thought to involve financial irregularities this will be referred to audit and follow the relevant procedures as disclosed in the anti-money laundering, anti-bribery, fraud and corruption and whistleblowing policies (with reference to Treasury Management Practice Statement 9) as necessary

**1.12. Treasury Management**

All treasury management activities will be carried out in accordance with the latest Chartered Institute of Public Finance and Accountancy (CIPFA) Treasury Management in the Public Services: Code of Practice and Cross-Sectoral Guidance Notes and the Treasury Management Strategy approved by Council

**1.13. Declarations of Interest**

Officers must, on an annual basis, declare an interest and absent themselves from any managerial involvement in any financial matter from which they or their family could directly or indirectly benefit as required in the employee code of conduct. Declaration records will be held on a register.

**1.14. Banking Arrangements**

No officer has authority to open a bank account or procure new electronic payment functionality or facilities without prior specific written delegation of that authority by the S151 Officer or nominated officer

**1.15. Budgetary Control**

Directors and the Chief Executive must ensure, that their Assistant Directors / Heads of Service are managing their budgets, including commitments, appropriately by requiring that the monthly budget monitoring position and any necessary mitigating actions are presented to the Finance Board for consideration and thereafter subsequently reported to the Executive Leadership Team.

**1.16. Role of Directors**

Budgets are allocated to Directors to enable them to deliver services approved by Members through the budget setting process. Directors are required to ensure budgets are deployed in accordance with these rules to deliver policies and plans determined by members, and to ensure that there are processes and procedures in place within their directorates to be compliant with systems of internal control

## **2. Scheme of Delegation – Financial Approval Limits**

### **2.1. Introduction**

In the constitution, the Policy and Budget framework sets out the delegation of financial responsibility and budget spending limits to the officers of the Council, in conjunction with the Executive.

This Financial Scheme of Delegation outlines officers' delegation levels, detailing the responsibility levels that council officers hold to make financial related decisions on spending, income and other financial related issues and sets out the approved financial limits within which authorised officers may conduct council business.

If an officer is unclear of their delegation level when making a relevant financial decision, this should be discussed with the relevant Executive Director prior to any financial decisions being made.

The Financial Regulations themselves are also made up of several Codes of Practice and specific policies which should be read in conjunction with this scheme of delegation

## 2.2. Summary of Finance Delegations & Thresholds

| <b>Approving the award of new contracts, and extensions / alterations to existing contracts</b><br>Where the appropriate authorisation to undertake a tender exercise is already in place<br>#Procurement advice must be sought in relation to 3 <sup>rd</sup> party spend |                                                                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| Value (before VAT)                                                                                                                                                                                                                                                         | Approval level                                                                                            |
| Uo to £10,000                                                                                                                                                                                                                                                              | Budget Holder                                                                                             |
| In excess of £10,000 but not more than £50,000                                                                                                                                                                                                                             | Service Manager                                                                                           |
| In excess of £50,000 but not more than £150,000                                                                                                                                                                                                                            | Head of Service                                                                                           |
| In excess of £150,000 but not more than £250,000                                                                                                                                                                                                                           | Director / Assistant Director                                                                             |
| In excess of £250,000 but not more than £500,000                                                                                                                                                                                                                           | Executive Director                                                                                        |
| In excess of £500,000                                                                                                                                                                                                                                                      | Cabinet                                                                                                   |
| <b>Approving Revenue Payments (invoice approvals) –securing spend authority - with an order in place</b><br>#Procurement advice must be sought in relation to 3 <sup>rd</sup> party spend                                                                                  |                                                                                                           |
| Value (before VAT)                                                                                                                                                                                                                                                         | Approval level                                                                                            |
| Uo to £10,000                                                                                                                                                                                                                                                              | Budget Holder                                                                                             |
| In excess of £10,000 but not more than £50,000                                                                                                                                                                                                                             | Service Manager                                                                                           |
| In excess of £50,000 but not more than £150,000                                                                                                                                                                                                                            | Head of Service                                                                                           |
| In excess of £150,000 but not more than £250,000                                                                                                                                                                                                                           | Director / Assistant Director                                                                             |
| In excess of £250,000 but not more than £500,000                                                                                                                                                                                                                           | Executive Director                                                                                        |
| In excess of £500,000                                                                                                                                                                                                                                                      | S151 Officer (note: approval of orders in excess of £500,000 remains a key decision for cabinet approval) |

| <b>Approving Capital Payments (invoice approvals) –securing spend authority - with an order in place</b>                                                 |                                                                                                           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| Approvals should be in consultation with the Finance Board<br>#Procurement advice must be sought in relation to 3 <sup>rd</sup> party spend              |                                                                                                           |
| <b>Value (before VAT)</b>                                                                                                                                | <b>Approval level</b>                                                                                     |
| Uo to £10,000                                                                                                                                            | Budget Holder                                                                                             |
| In excess of £10,000 but not more than £50,000                                                                                                           | Service Manager                                                                                           |
| In excess of £50,000 but not more than £150,000                                                                                                          | Head of Service                                                                                           |
| In excess of £150,000 but not more than £250,000                                                                                                         | Director / Assistant Director                                                                             |
| In excess of £250,000 but not more than £500,000                                                                                                         | Executive Director                                                                                        |
| In excess of £500,000                                                                                                                                    | S151 Officer (note: approval of orders in excess of £500,000 remains a key decision for cabinet approval) |
| <b>Amendments to the Capital Programme</b>                                                                                                               |                                                                                                           |
| The overall Capital programme is scrutinised and approved on an annual basis. This scheme of delegation therefore related to operational in-year changes |                                                                                                           |
| <b>Value (before VAT)</b>                                                                                                                                | <b>Approval level</b>                                                                                     |
| New Capital Schemes Funded by borrowing includes spend funded by S106 agreement where spend incurred before funds received                               | Cabinet then Council                                                                                      |
| New 100% externally funded schemes valued at not more than £1,000,000. Includes Schemes funded by capital receipts or revenue contributions              | S151 Officer                                                                                              |
| New 100% externally funded schemes valued in excess of £1,000,000. Includes Schemes funded by capital receipts or revenue contributions                  | Cabinet                                                                                                   |
| Virements (the movement of finances (budget or expenditure) between projects) valued at not more than £250,000                                           | S151 Officer                                                                                              |
| Virements (the movement of finances (budget or expenditure) between projects) valued in excess of £250,000                                               | Cabinet                                                                                                   |

| Approving payments that do not have an order – Exemption forms (for exceptional / unforeseen payments)                     |                                                                                             |                                 |
|----------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------|
| Value (before VAT)                                                                                                         | Approval level                                                                              |                                 |
| Up to £150,000                                                                                                             | Head of Service                                                                             |                                 |
| In excess of £150,000 but not more than £250,000                                                                           | Director / Assistant Director                                                               |                                 |
| In excess of £250,000 but not more than £500,000                                                                           | Executive Director                                                                          |                                 |
| In excess of £500,000                                                                                                      | Cabinet                                                                                     |                                 |
| Budget Movements ( revenue and capital virements)                                                                          |                                                                                             |                                 |
| If a virement impacts more than one service, approval is required at the appropriate level from all impacted service areas |                                                                                             |                                 |
| Value (before VAT)                                                                                                         | Approval required                                                                           | Required to obtain consent from |
| Up to £25,000                                                                                                              | Head of Service                                                                             | Strategic Finance Lead          |
| In excess of £25,000 but not more than £100,000                                                                            | Director                                                                                    | Deputy S151 Officer             |
| In excess of £100,000 but not more than £500,000                                                                           | Director                                                                                    | S151 Officer                    |
| In excess of £500,000                                                                                                      | Executive Director. Virement is disclosed in Monitoring report which is Approved by Cabinet | S151 Officer                    |
| Debt Write-off approval                                                                                                    |                                                                                             |                                 |
| The values relate to individual debts                                                                                      |                                                                                             |                                 |
| Value (before VAT)                                                                                                         | Approval required                                                                           | Required to obtain consent from |
| Uo to £10,000                                                                                                              | Head of Service                                                                             | Director                        |
| In excess of £10,000 but not more than £25,000                                                                             | Responsible Director in consultation with the Assistant Director of Finance                 | S151 Officer Officer            |
| In excess of £25,000 but not more than £50,000                                                                             | S151 Officer in consultation with the Monitoring Officer                                    | Relevant Cabinet Member         |
| In excess of £50,000                                                                                                       | Cabinet                                                                                     |                                 |

|                                                                                                                |                                                                |                 |
|----------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|-----------------|
| Bids for external grant funding – expenditure of funds to follow revenue expenditure delegations set out above |                                                                |                 |
| Value (before VAT)                                                                                             | Approval level                                                 |                 |
| All                                                                                                            | S151 Officer and Executive Director(s) must agree and sign off |                 |
| Treasury transactions                                                                                          |                                                                |                 |
| Value (before VAT)                                                                                             | Approval level                                                 |                 |
| All                                                                                                            | S151 Officer or delegated to nominated officer(s)              |                 |
| Purchase Cards                                                                                                 |                                                                |                 |
| Transaction Limit / Monthly card Limit                                                                         | Card User                                                      | Card Authoriser |
| £200 / £2,000                                                                                                  | Nominated operational staff                                    | Head of Service |
| £500 / £5,000                                                                                                  | Head of Service                                                | Director        |
| £10,000 / £50,000                                                                                              | On call emergency manager                                      | Exec Director   |
| Reserves                                                                                                       |                                                                |                 |
| Value (before VAT)                                                                                             | Approval level                                                 |                 |
| All                                                                                                            | S151 Officer                                                   |                 |



# **FINANCIAL PROCEDURE RULES**

## **Guidance Notes**

### **3. Financial Integrity**

The council must ensure that it has a sound system of internal control, which delivers effective financial, operational and risk management

#### **3.1. Accounting Procedures**

All accounting procedures and records of the Council and its Officers shall be determined by the S151 Officer or nominated officer in consultation, where necessary, with the appropriate Director or Head of Service / Assistant Director (or equivalent) concerned. Such procedures shall be in accordance with statutory Accounts and Audit Regulations.

#### **3.2. Responsibility of S151 Officer or Nominated Officer**

The S151 Officer or nominated officer shall be responsible for the compilation of the main accounting records for the Council.

The S151 Officer or nominated officer may from time-to-time issue written “financial instructions” dealing with detailed procedures to be followed in certain matters. Such instructions shall be issued after consultation with the Director, Assistant Director or Heads of Service affected.

The S151 Officer or nominated officer shall be responsible for the maintenance of a management information system, the General Ledger.

#### **3.3. Segregation of Duties**

The following principles shall be observed in the allocation of accounting duties by all employees or consultants engaged by the Council:

- All material Transactions, including those associated with the movement of existing funds and budgets within the General Ledger or sales and purchase requests, must be Prepared and Authorised by different individuals, in accordance with the Scheme of Delegations and the Journal policy outlined in Appendix B.
- Approval must be obtained from the officer responsible for any budget impacted by a proposed transaction, in accordance with the Scheme of Delegations and the Journal policy outlined in Appendix B, before the Transaction may be processed
- The duties of providing information regarding sums due to or from the Council and of calculating, checking, and recording these sums, shall be separated as completely as possible from the duty of collecting or disbursing them.
- Officers charged with the duty of examining and checking the accounts of cash transactions shall not themselves be engaged in any of these transactions.

### 3.4. **Maintenance of the core Finance System**

The S151 officer shall assure the integrity of data held on the Finance System by delegating the below tasks to nominated Officers;

- The routine completion of a dedicated suite of reconciliations designed to give assurance that the data held on the General Ledger is accurate
- Maintenance of the Chart of Accounts and all supporting coding structures, in accordance with the COA Maintenance policy outlined in Appendix C
- Maintenance of key system-generated Statutory and Management reports to ensure that they reflect impactful developments as they occur (for example restructures or changes to legislation)
- Timely Maintenance of changes to system user access requirements (for example in relation to new starters, leavers or user role changes)
- Maintenance of System user guides and training requirements

## 4. **Accounts and Audit**

### 4.1. **Accounting records**

The accounting records determined by the S151 Officer must be sufficient to explain the council's transactions and to disclose its financial position with reasonable accuracy at any time. In particular, they must contain:

- Day-to-day entries of all sums of money received and expended by the council and the matters to which they relate;
- A record of the assets and liabilities of the council

The S151 Officer shall complete and certify the annual Accounting Statements of the council contained in the Annual Statement of Accounts and Annual Governance Statement, prepared and approved in accordance with the Accounts and Audit Regulations 2015 and relevant CIPFA proper, as soon as practicable after the end of the financial year. Having certified the Accounting Statements, the S151 Officer shall submit them with any related documents to the council, within the timescales required by the Accounts and Audit Regulations.

### 4.2. **Role of Internal Audit**

**The council must ensure that there is an adequate and effective system of internal audit of its accounting records and internal control system in accordance with proper practices**

This service is currently provided by an Internal Council Team of staff and will assist Directors, Assistant Directors, Heads of Service and Senior Managers in the effective discharge of their responsibilities by giving assurance on financial and management control systems, identifying weaknesses, giving advice on how to resolve financial and management problems and improve control, investigating suspected irregularities and by undertaking Value for Money (VFM) reviews and management studies

The internal auditor shall be appointed by the council and shall carry out their work to evaluate the effectiveness of the council's risk management, control and governance processes in accordance with proper practices specified in the Practitioners' Guide.

The council shall ensure that the internal auditor:

- is competent and independent of the financial operations of the council;
- Prepares and presents to Audit Committee an annual report outlining the work undertaken, and future work programme, of Internal Audit
- can demonstrate competence, objectivity and independence, free from any actual or perceived conflicts of interest, including those arising from family relationships; and
- has no involvement in the management or control of the council aside from assigned input into the maintenance of the Corporate Risk Register, which sits within Fraud, Audit, Insurance and Risk (FAIR)

Internal or external auditors may not under any circumstances:

- perform any operational duties for the council;
- initiate or approve accounting transactions; other than those necessarily undertaken to enact effective management of their own budget areas
- provide financial, legal or other advice including in relation to any future transactions; or
- direct the activities of any council employee, except to the extent that such employees have been appropriately assigned to assist the internal auditor.

For the avoidance of doubt, in relation to internal audit the terms 'independent' and 'independence' shall have the same meaning as described in The Practitioners Guide

#### **4.3. Accounts and Audit Regulations required by the Secretary of State**

**Any officer or member of the council must make available such documents and records as the internal or external auditor consider necessary for the purpose of the audit** and shall, as directed by the council, supply the S151 Officer, internal auditor, or external auditor with such information and explanation as the council considers necessary

The S151 Officer shall make arrangements for the exercise of electors' rights in relation to the accounts, including the opportunity to inspect the accounts, books, and vouchers and display or publish any notices and documents required by the Local Audit and Accountability Act 2014, or any superseding legislation, and the Accounts and Audit Regulations.

#### **4.4. Powers of Internal Audit**

The S151 Officer or nominated officer and all authorised Internal Audit staff are empowered to enter at reasonable times any premises or land owned by or in the control of the Council, if appropriate, and require employees to produce Council property and records under their control

#### **4.5. Financial Irregularities with regard to Council Functions**

Where matters arise, which involve or are thought to involve financial irregularities this will be referred to audit or follow Anti-money Laundering procedures and Treasury Management Policy Statements as necessary

### **5. Financial Planning, the Budget Process and Precept Setting**

#### **5.1. Financial Strategy**

The Medium-Term Financial Strategy (MTFS) sets the framework for understanding the challenges and forecasted future financial position of the council. The MTFS supports the council's aims and objectives and encourages discussions about the allocation of resources, helping the council to understand its financial resilience.

The MTFS gives a 3-year forecast of the Council's projected financial position, enabling officers to consider the scale of any financial challenges over the medium term to enable appropriate actions and interventions to achieve financial sustainability. This effectively ensures that the council aligns its resources to its priorities and enables the prioritisation of investment based on the deliverability of outcomes

The MTFS process is an integral part of the council's financial planning process. The development of the MTFS is iterative and must be updated whenever officers become aware of any event causing a material change to the underlying financial projections, to ensure that it reflects the most up to date information and issues. The S151 Officer will also oversee three overarching reviews of the MTFS at the following points;

- When setting the Council's draft budget (Oct/Nov)
- When setting the Council's final budget and updated budget strategy (Feb)

The medium-term financial strategy will set out the parameters for the budget build process for the coming year. The Budget and Policy Framework will be followed and the strategy will be approved at Council

#### **5.2. Capital and Revenue Budgets**

The detailed form of Capital and Revenue budgets shall be determined by the S151 Officer or nominated officer consistent with the general directions of the Finance Board. The Budget and Policy Framework will be approved by Council following recommendation from Cabinet.

Where there is an element of Council revenue or capital match funding identified this must already exist within the revenue budget or capital investment budget (or recommended by Cabinet for approval at the next Council meeting to add to the capital investment budget).

Directors are responsible for delivering approved budgets, including achievement of savings, management of demand and cost pressures and identifying mitigations where required. Progress against saving plans must be regularly reported and monitored

### **5.3. Capital Programme**

The S151 Officer will maintain a Capital Strategy to feed into the annual Capital Programme. Directors and their nominated budget holders, in consultation with the S151 Officer or nominated officer, shall jointly prepare for consideration by the Executive Team, a draft Capital Budget alongside the revenue income and expenditure budgets. These must be prepared in accordance with the policies and timescales determined by the Cabinet. The Budget and Policy Framework, including the Capital Programme, will be approved by Cabinet and then Council.

### **5.4. Approval of Estimates**

The budget, once approved by the Council shall become the Council's Revenue Budget and Capital Budget for the next financial year.

Approval of the annual budget by the Council will confer authority on the Directors, Assistant Directors and Heads of Service of the Council to incur revenue expenditure so provided for the next financial year subject to compliance with the relevant provisions of the Contract Procedure Rules.

### **5.5. In-year adjustments to Capital and Revenue Budgets (Virements)**

Budgets, once set, are an important analytical tool for the council. Under/Overspends should be analysed in order to augment Bury's business intelligence. It is impossible to forecast operational activity (set a budget) with 100% accuracy therefore an overspend does not indicate wrongdoing - instead it signals a need to re-appraise the original assumptions made at the time of budget-setting. Adjustments to budgets in reaction to over/under spends should therefore be discouraged

Virement approvals must be granted in accordance with the Scheme of Delegations. Virements between service areas require approval, at the appropriate level, from all impacted service areas.

The following transfers will not count as virement for these purposes:

- Budget movements which occur as a result of year end procedures.
- Transfers of budgets when a whole or part service transfers from one directorate to another as a result of a service restructure or change in line management responsibilities.
- Income and expenditure budget changes reflecting additional grants not included in the Council's approved budget.
- Transfers arising from changes in legislation.
- Any support service recharges (allocation of overheads) for accounting purposes

### **5.6. In-year amendments to the Capital Programme**

The overall Capital programme is scrutinised and approved on an annual basis. Operational in-year changes must be made in accordance with the stipulations of the Scheme of delegation

In-year additions to the capital programme which are funded by external borrowing must firstly be approved by Cabinet and then by full council. Additions which are externally funded, funded by Capital Receipts or by Revenue Contributions and are valued under £1m may be approved by the S151. Those with a value exceeding £1m need to be approved by Cabinet.

The movement of finances (budget or expenditure) between projects which do not alter the overall financial envelope of the Capital programme may be authorised by the S151 Officer provided they do not exceed £250k. Any virements exceeding £250k will be noted in the Quarterly financial performance reporting and reviewed by Cabinet

#### **5.7. Payments under contracts for building or other construction works**

Where contracts provide for payment by instalments the responsible officer shall maintain a record of all such payments, which shall be made within the time specified in the contract based on signed certificates from the architect or other consultant engaged to supervise the works.

Any variation of, addition to or omission from a contract must be authorised by the Finance Board, with the board being informed where the final cost is likely to exceed the contract sum by 5% or more, or likely to exceed the budget available.

#### **5.8. External Funding**

External funding may be granted subject to various obligations, with successful bids therefore resulting in the Council being bound by the resulting requirements. On this basis, to ensure the relevant measures are put in place to assure compliance, all bids for external funding must be signed off by the S151 and the Executive Director of the service making the bid

Authorisation to submit a bid for grant or other external funding, or accept an offer of such funding, must be obtained in advance of bid documents or acceptance documents being signed. This includes a situation where the Council intends to act as Accountable Body in respect of partnership funding, in which case authorisation to accept this Accountable Body status must also be obtained.

Developer contributions continue to support investment need associated with developments throughout the Country. Once a S106 has been completed, planning permission has been granted and the development subject to agreement has commenced, with the right governance in place the Council will be able to internally borrow to fund the project to commence prior to the developer contributions being received. The borrowing will be funded short term within the cash balances and repaid once the developer contributions have been received.

#### **5.9. Council Tax, budget and Precepts**

**Before setting a precept, the council must calculate its council tax requirement for each financial year by preparing and approving a budget, in accordance with The Local Government Finance Act 1992 or succeeding legislation.**

Once the Council has set the council tax requirement and administered the relevant precepts from precepting bodies, the S151 Officer is responsible for informing preceptors of the taxbase who then in turn agree their own budgets

The Council is responsible for the completion of the statutory NNDR returns, which inform the Greater Manchester Fire Rescue Service and the PCC of their precept amounts, in accordance with set deadlines.

**Any Member with council tax unpaid for more than two months is prohibited from voting on the budget or precept by Section 106 of the Local Government Finance Act 1992 and must disclose at the start of the meeting that Section 106 applies to them.**

## **6. Expenditure – Controls**

### **6.1 Role of Directors**

Directors are accountable for the effective financial management of their services and must ensure that:

- Expenditure is contained within approved budgets
- All expenditure complies with the Contract Procedure Rules
- Resources are aligned to service priorities
- Financial risks are actively managed
- Allocate responsibility for managing each budget area within their service and inform S151 Offer or nominated of the allocation and any changes as soon as they occur

Where financial pressures arise, Directors must take timely corrective action and escalate issues in accordance with the financial monitoring framework and must apply the rules set out under cash limited budgets below.

Directors must ensure that Budget Holders:

- Understand their responsibilities
- Liaise with the Finance service to ensure that they have access to timely and appropriate financial information
- Receive appropriate budget management training and support
- Work with stakeholders, including the finance service, to provide accurate and timely budget monitoring information as well as having input into any other Financial reports which impact, or are impacted by, their budget area
- Ensure that all expenditure complies with the Contract Procedure Rules

### **6.2 Role of Budget Holders**

Budget Holders are responsible for:

- Monitoring income and expenditure against budget
- Ensuring commitments are properly recorded
- Complying with Financial Regulations and procurement rules
- Taking action to manage variances
- Ensuring value for money in all spending decisions
- Taking agreed actions to deliver any approved savings that they are accountable for, monitoring and reporting progress as necessary

### 6.3 Monthly Forecasting

Preparation of Financial information shall be the joint responsibility of budget holders and assigned members of the Finance service, who will collaborate to ensure the presented information is an accurate reflection of the council's operations

The S151 Officer will provide Monthly reports (with the exception of Period 1) on the Council's overall financial position to the Finance Board and Cabinet. For budgets assessed as being "high risk", monthly reporting will be provided to the Finance Board.

"High risk" budgets are those which are volatile and are impacted by increasing demand and material. These will be subject to additional scrutiny, with the focus being on plans that services have to mitigate spending pressures

Material variances between actual and forecasted expenditure will be discussed and understood, with any significant changes to underlying assumptions being assimilated into the Council's projected financial position

The delivery of approved savings will also be monitored and reported on, with mitigations agreed should any savings be non-achievable or delayed.

### 6.4 Cash Limited Budgets

Budgets are cash-limited to the net annual budget for each service with Directors being required to ensure that they operate within these limits and do not overspend their service budgets.

Budget holders, in collaboration with the Finance Service will be required to agree and sign off their budgets on an annual basis as part of the budget-setting process; to do this, they will be expected to understand the composition of their budgets and their relevant financial drivers

The use of reserves must not be relied upon as a substitute for effective budget management and may only be applied in accordance with the Scheme of Delegation for reserves. The Council maintains a general reserve to be used only in exceptional circumstances where there is an unavoidable year-end overspend and will require approval from the S151 Officer in line with the Scheme of Delegation.

Revenue Expenditure in non "high-risk" budget areas may not be automatically incurred if it will result in a breach of the overall Service Budget, unless alternative funding sources have been secured or agreed. Any such proposed expenditure will be subject to scrutiny and approval by the Finance Board, or Cabinet if the value exceeds £500,000, alongside the monthly review of any pressures in "high risk" Budget areas

The approval criteria for the additional expenditure may include provision for repayment of the overspend if the Finance Board deems this to be appropriate (for example reimbursement from future savings generated by invest-to-save proposals) over an agreed timescale.

The S151 Officer, through the Finance Board and Cabinet will, receive quarterly finance reports outlining all forecasted over/underspends.

## **6.5 Overspends; Exceeding Cost Centre Budget**

Directors may authorise expenditure which would otherwise exceed the estimate for a cost centre, provided that the expenditure:

- can be met from savings or under spending on other cost centres within the same service provided that these are not the result of non-recurrent increases in income or decreases in expenditure, will not constitute Capital Expenditure or result in:
  - a change in the level of service provision; or
  - a commitment to incur expenditure in future years; or
  - a change in policy; or
  - a breach of the Council's Workforce Strategy.
- is not a virement from a support service recharge code.
- is approved by the Finance Board if less than £500,000, or by Cabinet if the value exceeds £500,000

All such adjustments must be recorded and notified to finance

## **6.6 Carry forward of Underspends**

Genuine provisions for liability as recognised by the Code in force must be accounted for in accordance with this guidance. Where budget holders wish to carry forward any unspent monies into the next financial year, then they must provide a business case to the S151 Officer.

These cases will be assessed against the relevant accounting guidance and the explanations provided in the case. The final decision for the carry forward of under spends is for the S151 Officer.

## **6.7 Approval of Expenditure**

The scheme of delegations stipulates sign-off limits relating to the approval of Revenue Expenditure. The assumption is that the appropriate contract is already be in place, and that the approvals conform to the "no po no pay" policy

## **6.8 Recognition of Capital Expenditure**

The Council has a £15,000 de-minimis limit for the recognition of Capital Expenditure

## **6.9 Raising Invoices**

The Head of Service / Assistant Director (or equivalent) shall nominate those Officers eligible to raise Purchase Requisitions on the Council's financial system

Purchase Requisitions will be linked to the Supplier Catalogue; officers raising a requisition will be required to select an approved Supplier and Product

The Finance system converts the Purchase Requisition into a Purchase Order upon the approval of the appropriate Authorising Officer, as set out in the Scheme of Delegations

All routine expenditure must be made by raising a Purchase Requisition; any exceptions to this must follow the outlined process for either Exception firms or Purchase Cards

The duties of requisitioning goods or services and the subsequent confirmation of their receipt (goods received note process) shall not be performed by the Officer authorising the same Order

#### **6.10 Goods Received Process**

The Head of Service / Assistant Director (or equivalent) or Delegated Officer shall ensure that the Corporate Finance System is promptly updated when goods or services are received. Before completing the Goods Received Note process the verifying Officer shall, save to the extent that the S151 Officer or nominated Officer may otherwise determine, be satisfied:

- that the goods have been duly received examined and approved as being in accordance with the specification or match the official order and are satisfactory.
- that the works done, or services rendered have been satisfactorily carried out and that, where applicable, the materials used were of the requisite standard.
- that the proper entries have been made in the inventories or stores records, where appropriate.
- that the Council's purchasing guidance has been followed

Payment of invoices is dependent upon the satisfactory completion of this process

#### **6.11 Coding of Expenditure and Income**

All expenditure and income must be accurately to the correct cost centre and account code to which it relates. Miscoding expenditure / income distorts the Council's financial information

Journal transfers must comply to the Journal Governance Policy (Appendix B). The appropriate supporting documentation must be attached, and the appropriate level of approval obtained from all impacted service areas before they may be processed

Officers processing financial transactions shall be responsible for ensuring that all Value Added Tax is correctly accounted for.

#### **6.12 Use of Reserves**

Section 25 of the Local Government Act 2003 requires the Chief Financial Officer (S151 Officer) to report to Council on the robustness of estimates and adequacy of reserves. As such, the management of financial reserves and provisions is ultimately a S151 responsibility

When establishing reserves, the Council needs to ensure that it is complying with the Code of Practice on Local Authority accounting and in particular the need to distinguish between reserves and provisions

- Reserves are funds set aside to cover unexpected expenses, meet future obligations, or manage risks
- A provision is recorded as a cost against a cost centre when the council has a present obligation as a result of a past event, it is probable that the cost will be paid to settle the obligation, and a reliable estimate of the value of the cost can be made

The overall level of reserves balances will be reported to Cabinet on an annual basis.. The annual budget report to Council will include:

- A statement of movements in reserves for the year ahead and the following two years
- A statement of the adequacy of general reserves and provisions in the forthcoming year and in the Medium-Term Financial Strategy; and
- A statement on the annual review of reserves.

Once a reserve has fulfilled the purpose for which it was established, any remaining balance should be reallocated to another similar purpose earmarked reserve or surrendered to General Reserves

## **7. Procurement**

### **7.1. Supplier Catalogue**

Catalogues or Product Lists are Mandated for the ordering of all goods, services and works related to 3<sup>rd</sup> party spend. The only exceptions to this will be expenditure raised via an Exemption form or procured via a Purchase Card.

Staff who require a good or service must ensure that they complete a catalogue template and send this to Procurement before ordering and goods, services or works

This approach will ensure that staff and suppliers are compliant and deliver high-quality goods and services at an economical price.

Any requests to add a Supplier or Product to the Supplier Catalogue must be directed to the Procurement Service via completion of the relevant template

All requests to add a supplier must be Prepared and Authorised by different individuals.

All prospective additions to the supplier catalogue will be subject to the appropriate due diligence protocols and may only be used once a contract is in place.

Checks and balances will be in place to monitor compliance, underpinned by regular reviews of expenditure activity.

The Procurement Continuous Improvement Group, reporting to the Finance Board, is tasked with ensuring that this process maximises the efficient, effective and economic use of resources.

## 7.2 Contracts

Every contract shall comply with the council's Standing Orders, these Financial Regulations and the Contract Procedure Rules.

**For a contract for the supply of goods, services or works where the estimated value will exceed the thresholds set by the UK Government, the full requirements of The Procurement Act 2023 and The Procurement Regulations 2024 or any superseding legislation ("the Legislation"), must be followed in respect of the tendering, award and notification of that contract**

**For contracts estimated to be over £30,000 including VAT, the council must comply with any requirements of the legislation regarding the publication of invitations and notices.**

The sign-off limits in the Scheme of Delegations relate to the award of new and renewed contracts. The assumption is that the appropriate approvals required in order to undertake a tender exercise will already be in place, and that the scheme of delegation relates to the award of a contract to a preferred bidder or extension / alteration of a contract with an existing supplier

**Contracts must not be split to avoid compliance with these rules.**

## 7.3 Exceptions

The requirement to obtain competitive prices in these regulations need not apply to contracts that relate to specialist professional services, such as legal professionals acting in disputes;

## 7.4 Financial Control

No contractual commitments which will cause an overspend may be made other than by resolution of Cabinet except in an emergency.

Finance involvement should be sought in order to obtain confirmation of the budget available, or to discuss mitigating options

No expenditure shall be authorised, no contract entered into, or tender accepted in relation to any major project, unless [the council] is satisfied that the necessary funds are available and that where a loan is required, Government borrowing approval has been obtained first.

## 8. Banking and payments

### 8.1. Arrangements with Council's Bankers

All arrangements with the Council's bankers must be made by or under arrangements approved by the S151 Officer or nominated officer, who is authorised to operate such banking accounts and other electronic transactions as they may consider necessary.

All bank accounts must be reconciled on a regular basis (at least monthly). Reconciliations must:

- Be completed promptly
- Be independently reviewed
- Be retained for audit purposes

## **8.2. Payment of Invoices**

It is the Council's policy to pay all invoices within 30 days of invoice date. It is therefore the responsibility of all staff to assist Pay Services in ensuring invoices can be processed for payment as soon as possible through full compliance with all the relevant financial procedures.

## **8.3 Invoice Authorisation**

Invoices for payment should be examined for arithmetical accuracy, analysed to the appropriate expenditure heading and verified to confirm that the work, goods or services were received, checked and represent expenditure previously authorised by the council. Invoices may therefore only be released for payment when an appropriately authorised purchase order, exemption form or purchase card authorisation is in place

CIS Invoices are bills issued by a sub-contractor to a contractor for construction work, which include tax deductions required by HMRC under the Construction Industry Scheme (CIS). These should include the gross amount due, the appropriate deduction rate (20% for registered subcontractors or 30% for unregistered) and the net amount payable to the subcontractor. In order to assure compliance with these requirements, it is essential that labour and materials are itemised separately on all applicable requisitions raised (and invoices received against the requisitions) in order to meet the criteria for processing

## **8.4. Amendments and Deletions**

Amendments to or deletions from an invoice must only be made in exceptional circumstances and must be authorised by the S151 Officer or nominated officer. No alterations to a Value Added Tax invoice may be made but a new invoice or credit note must be sought from the supplier. To avoid the possibility of duplicate payments photocopies or faxes are not accepted as valid invoices except in emergencies

## **8.5. Safeguarding against Fraud or Error**

The council must have safe and efficient arrangements for making payments, to safeguard against the possibility of fraud or error. More than one person should be involved in any payment, following the principles outlined in the Scheme of Delegations and these financial regulations. Additional checks and balances, including daily bank reconciliations, should be in place to further mitigate risk.

## **8.6. Data Security**

Personal payments (including salaries, wages, expenses and any payment made in relation to the termination of employment) may be summarised to avoid disclosing any personal information.

### **8.7. Payment methods**

All payments shall be made using electronic payment methods (e.g., BACS, CHAPS, faster payments) or by virtual and physical purchase cards in accordance with the Purchase Card Policy (Appendix D)

Segregation of duties must strictly be applied in relation to payments. The preparation, authorisation and processing of payments need to be actioned in separate stages by different individuals.

### **8.8. Funds Held on Behalf of Others**

All funds held on behalf of others (Trust or Private) shall be subject to an annual audit, which shall be undertaken by a suitably qualified person. A copy of all audit reports and the final accounts shall be made available, on request, to Internal Audit for information. In respect of Schools, the audit report and the findings shall be presented to their School Governors.

The appropriate officers who are responsible for the administration of Trust or Private funds shall be responsible for ensuring that all Value Added Tax is correctly accounted for and shall have due regard to the treatment of Value Added Tax on donated funds (as detailed in Section 15 of the Local Government Act 1972).

Officers shall be responsible for ensuring that Trust and Private Funds are appropriately invested for the benefit of the fund. Advice as to the most appropriate method of investment will be obtained from the S151 Officer or nominated officer.

## **9. Purchase Cards**

### **9.1. Policy**

All usage of Purchase Cards must be compliant with the Purchase Card Policy (Appendix D)

### **9.2. Purpose**

Purchase cards are intended to be used only on occasions where there is a need for an unforeseen immediate payment, for example to pay for an emergency care placement.

Less urgent unforeseen payments should be made using exception forms. All other payments should be made by raising a purchase requisition against an existing contract, in line with the Contract Procedure Rules

### **9.3. Card Holders**

Purchase cards will be specifically allocated to approved officers (including on-call emergency managers) and usage restricted to the recipients

A cardholder must be a permanent member of staff who has worked for Bury Council for a period of at least six months in an eligible role and must also have completed the probation period.

Unless there are exceptional business needs, cards must not be allocated to temporary staff. In special circumstances when an exception can be justified and a member of staff requires a Purchase card to carry out the nature of their work written approval from their service director can waive these rules.

Line Managers are responsible for reporting changes in the cardholders' circumstances that might affect their card use (such as name or job changes, long term sickness, and maternity leave) promptly to Procurement

#### **9.4. Card Limits and authorisation**

Limits for individual transactions and card limits are outlined in the Scheme of Delegations. Itemised card expenditure and accompanying receipts must be reviewed for appropriateness and compliance and approved on a monthly basis.

#### **9.5. Compliance and VAT**

The cardholder must ensure that VAT receipts are retained for all transactions and that VAT is correctly identified and recorded. All expenditure must be accurately coded to the correct cost centre and account code to which it relates

### **10. Local Bank Accounts – Imprest / Petty Cash Accounts**

#### **10.1 Imprest / Petty Cash Advances**

The S151 Officer or nominated officer will provide imprests and petty cash advances, where appropriate, to Officers for the purpose of defraying expenses. A receipt shall be signed in respect of each advance by the Officer concerned, who shall be responsible for accounting for monies. A receipt should be signed in respect of floats issued to Officers

#### **10.2. Changes to Officers**

Any changes to Officers responsible must be immediately notified to the S151 Officer or nominated officer. An outgoing imprest holder must reconcile the imprest to the total amount held, whilst the incoming responsible Officer should satisfy themselves that all is in order before accepting responsibility for the imprest

#### **10.3. Disbursements**

Vouchers for disbursements must be obtained and attached to claims for reimbursement. Claims must be properly certified and forwarded for payment to the Payments Team at specified intervals, normally not exceeding one month

#### **10.4. Security of cash**

Heads of Service are responsible for ensuring that all cash is kept in a safe and secure place and that bank accounts are reconciled on a regular basis, not less than monthly. A bank statement must be received at least monthly for all imprest bank accounts

#### **10.5. Use of Imprest Accounts**

Imprest accounts can be used for amounts agreed by the S151 Officer or nominated officer:

- to pay for local purchases by cheque at the time of collection or delivery.
- to secure discounts or take advantage of special offers.
- to reimburse staff who have purchased small value items directly.
- all such payments must be supported by VAT invoices or receipts

#### **10.6 Use of Imprest Funds**

Imprest funds must never be used to pay salaries, wages, or other employee expenses i.e., travel/subsistence and removal/relocation expenses, without the specific approval of the S151 Officer or nominated officer. Such payments may attract liability to Income Tax or National Insurance contributions and must therefore be made via the payroll system

#### **10.7 Examination of Local Bank Accounts**

The S151 Officer or nominated officer may at their discretion examine and reconcile Local Bank Accounts and for this purpose shall be entitled to receive such information and explanation as may be required

#### **10.8. Partnership Arrangements**

Where it is intended that the Council should enter into a partnership arrangement to further the delivery of Council policy and/or services, this must be approved by the Executive Team and a supporting assurance self-assessment process must be completed.

Where the Council's financial contribution to the partnership exceeds £100,000 per annum, including any grant or external funding for which the Council would act as Accountable Body, a full assessment must be carried out using the self-assessment process

### **11. Payment of salaries and allowances**

As an employer, the council must make arrangements to comply with the statutory requirements of PAYE legislation. Councillors' allowances (where paid) are also liable to deduction of tax under PAYE rules and must be taxed correctly before payment.

The S151 Officer shall be responsible for ensuring appropriate arrangements are in place for the payment of all salaries, wages, pensions and other payments to all current and former employees of the Council

Payment of salaries shall be made, after deduction of tax, national insurance, pension contributions and any similar statutory or discretionary deductions, on the dates stipulated in employment contracts.

Deductions from salary shall be paid to the relevant bodies within the required timescales, provided that each payment is reported, as set out in these regulations above.

Any termination payments shall be supported by a report to the council, setting out a clear business case. Termination payments shall only be authorised by the full council.

All claims for payment of officer car allowances, subsistence allowances, travelling and incidental expenses shall be made through the Council's financial system

Officer's claims should be submitted promptly at the end of each month in which the journeys were made, or the expenses incurred. The S151 Officer or nominated officer may refuse to make payment of claims over 3 months old.

Payroll must be subject to regular reconciliation and review between payroll system and general ledger.

## **12. Treasury Management**

### **12.1. Treasury responsibilities**

All Treasury Management Activities, including borrowing and investing, must be conducted in accordance with the latest CIPFA Treasury Management Code, relevant statutory requirements and the Council's Treasury Management Strategy which is approved by Council on an annual basis

The S151 Officer is responsible for the Council's Treasury Management function and for ensuring effective arrangements are in place to process all operational Treasury transactions, with amendments to policy being subject to council approval

The S151 Officer must ensure regular reporting of treasury activity. The Council is responsible for:

- Approval of the Treasury Management Strategy
- Approval of borrowing limits and prudential indicators
- Oversight of treasury performance

Cabinet will receive:

- Regular treasury monitoring reports including performance against prudential indicators
- Annual treasury outturn report

Treasury activities must be supported by appropriate controls, including segregation of duties, authorisation of transactions, audit trails and reconciliations

### **12.2 Borrowing and Financing**

All borrowing must be:

- Approved as part of the Capital Programme and Treasury Strategy
- New schemes or activities which are to be financed from borrowing must be authorised by Council, prior to borrowing
- Affordable, prudent and sustainable
- Compliant with statutory requirements and prudential indicators

### **12.3 Investments**

Investment decisions must:

- Prioritise security, liquidity and yield (in that order)
- Comply with the Treasury Management Strategy
- Be undertaken by authorised officers

Investments must not expose the Council to undue financial risk.

#### **12.4 Cashflow forecasting**

Accurate cashflow forecasting drives the efficient use of council borrowing and investments, resulting in potential improvements to the Council's net interest payments / receipts

The Treasury Officers shall therefore ensure the appropriate links to services which have key influence on the Council's payments and receipts, such as Accounts Payable and Accounts Receivable, are in place and maintained. The obtained information shall feed into cashflow information which shall be used to help inform short and long-term decision making

Services must provide timely and accurate information to support cashflow forecasting

### **13. Income**

The Council must operate a robust income management framework to ensure that all income due is identified, collected, recorded and recovered efficiently.

The S151 Officer is responsible for overseeing corporate income collection arrangements. Directors are responsible for ensuring effective income management within their services.

#### **13.1. Collection of Monies**

The S151 Officer is responsible for ensuring that effective arrangements are in place to securely and efficiently process the collection of all sums due to the council

The general ledger shall be updated promptly of all monies due to the Council and of contracts, leases and other agreements and arrangements entered into which involve the receipt of money by the Council. The S151 Officer or nominated officer shall have the right to inspect any documents or other evidence in this connection as they may decide.

Debt recovery must be undertaken promptly and in line with the Council's debt management strategy and write off policy

#### **13.2. Invoicing for sums due**

Each Head of Service / Assistant Director (or equivalent) shall ensure that the established procedure is followed when raising invoices on the Council's Finance System in respect of work done, goods supplied, services rendered and all other amounts due to the Council

All services are required to raise invoices within 30 days of the chargeable activity being delivered or in advance where appropriate.

Periodic monitoring of invoicing activity across all service areas will be carried out. This will include reviewing the timeliness of invoice submission, the accuracy of information provided, and the completeness of supporting documentation

### **13.3 Payment of Amounts Due**

All accounts rendered in respect of amounts due to the Council shall contain a statement that payment must be made directly to the Council's bank account and that cheques, money orders, and postal orders should be made payable to Bury Council.

All cheques, money orders and postal orders received in any Service Unit shall be crossed "Bury Council". Personal Cheques must not be cashed out of the money held on behalf of the Council.

Our preferred payment method is though utilising the Bankers Clearing Automated System (BACS)

### **13.4 Payment into Council Account**

All monies received by an Officer on behalf of the Council shall, without delay, be transferred into the Council's bank account. No deduction may be made from such money save to the extent that the S151 Officer or nominated officer may specifically authorise.

Officers who bank money shall enter on the paying in slip and on the reverse of each cheque a reference to the related debt (receipt number or the name of the debtor) or otherwise indicate the origin of the cheque.

The name of the originating Service/Section shall be recorded on the paying in slip

### **13.5 Issue of Receipts**

Every sum received by a cashier or other officer of the council shall be immediately acknowledged by the issue of an official receipt, ticket or voucher except in the case of cheques or other arrangements may only be established with the express approval of the S151 Officer or nominated officer.

All official receipts, tickets, books and other cash tokens shall, except by special arrangements approved by the S151 Officer, be controlled and issued by the S151 Officer or nominated officer, who shall keep a register of their receipt and issue. Departments shall keep proper records of the issue and use of all receipts, tickets and cash tokens.

### **13.6 Recording Receipt of Monies**

Each Officer who receives monies on behalf of the Council, or for which they are accountable to the Council, shall keep records in a form approved by the S151 Officer or nominated officer.

### **13.7 Transfer of Monies**

Every transfer of official money from one member of staff to another will be evidenced in the records of the departments concerned by the signature of the receiving Officer

### **13.8. VAT Treatment**

The S151 Officer is responsible for ensuring that robust VAT arrangements are in place in compliance with HMRC requirements, including the accurate submission of VAT returns from the Council's financial systems within statutory deadlines

Services are responsible for ensuring that all transactions are correctly coded for VAT purposes within the Council's accounting system and are supported by appropriate documentation

### **13.9. Significant receipts**

Where significant sums of cash are regularly received by the council, the S151 Officer shall ensure that more than one person is present when the cash is counted in the first instance, that there is a reconciliation to some form of control record such as ticket issues, and that appropriate care is taken for the security and safety of individuals banking such cash.

### **13.10 Fees and Charges Schedule**

A Schedule of Fees and Charges shall be maintained for all charges where the council has discretion over the amounts charged for services provided, for income generating activities and for charges where there are statute limits. All decisions on charges for services and income generating activities will be taken with reference to and in support of council priorities and recorded as delegated decisions, as appropriate

All charges and the scope for charging will be reviewed at least annually within the service area, though charges within the same service area may need reviewing at separate times in the year. The review will include those services which could be charged for, but which are currently provided free of charge

### **13.11 Monitoring**

Income performance must be regularly monitored as part of the monthly financial budget monitoring information reviewed by the Finance Board. Reports must be comprehensive and include all sources of income, including Council Tax and NNDR, and outline details relating to income collection performance, outstanding debt levels, debt write-offs and key risks and issues

## **14. Write-offs**

### **14.1 Policy**

The governance applicable to Write-offs is outlined in the attached Write-off Policy (Appendix E)

## **14.2 Discharge of Debts**

No debt due to the Council, after it has been correctly established, shall be discharged otherwise than by payment in full or by the writing-off of the debt or the unpaid portion of it, on the authority of the S151 Officer or nominated officer where either:

- The debt is not enforceable, or that attempted recovery is likely to involve expensive litigation with limited hope of success; or
- The cost of recovery would be disproportionate to the amount involved

## **14.3 Written-off Debts**

The approval limits for debt write offs, which are set out in the Scheme of Delegations, relate to individual debts.

Budget Holders and Corporate Finance will be provided with details of those debts where write off is appropriate. Such details are to include information on recovery action already taken.

Corporate Finance shall use prudent estimation techniques to create and maintain adequate Bad Debt Provisions, to ensure that written-off debts represent minimal financial risk to the Council.

## **14.4 Reporting**

The write-off of debts in accordance with the list of exceptions will be reported quarterly to the Council's Finance Board & S151 Officer

# **15. Stocks and Stores**

## **15.1 Responsibility for Stocks**

Each Head of Service / Assistant Director (or equivalent) shall ensure:

- the proper custody of their stocks and stores in their Service Unit and shall ensure that they are subject to an effective system of stock recording and control.
- that stores are held in reasonable quantities and that consideration has been given to turnover, value, delivery quantities and delivery periods.
- that practicable steps are taken to ensure that a delivery note is submitted by a supplier for every delivery at the time of delivery.
- as soon as practicable after the delivery has been made that goods are checked to ensure that the correct quantity has been delivered and that they meet the appropriate quality standard.
- that no articles or goods are removed from stock without proper authority.
- that an annual review of stocks held is undertaken with a view to reducing the number of slow-moving items and disposing of obsolete stock items;
- that obsolete or other stocks no longer required for the purpose acquired are disposed of under the disposals policy.
- that accounts and records are maintained in connection with the receipt and issue of stores in such form and timetable as the S151 Officer.

- that on the 31st March each year the value of stocks held is certified and reported to the S151 Officer or nominated officer

## **15.2 Surplus or Deficiency**

Where any surplus or deficiency exceeds £5,000 in relation to any item of stock the S151 Officer shall be advised, and action taken where necessary

## **15.3 Checking of Stock**

The S151 Officer or nominated officer is entitled to check stores and be supplied with any information relating to the accounting, costing, and financial records of the Council

# **16. Disposal of Surplus or Obsolete Goods, Plant and Stocks**

## **16.1 Authorisation for Disposal**

Surplus or obsolete goods or plant, whether held in store, on inventories or otherwise up to the value of £2,000 per item or group of like items, must not be disposed of either by sale or destruction except upon the authorisation of the appropriate Director of the Assistant Director. Where the value is between £2,001 and £10,000 the authorisation of the Deputy S151 Officer or nominated officer must also be obtained. Where the value exceeds £10,000, authorisation from the S151 Officer must be obtained.

In relation to inventory items (e.g., IT equipment etc.) all items surplus to requirements should, in the first instance, be offered to other Council departments, schools etc. prior to being disposed of.

## **16.2 Sale of stock**

Sale must be affected by public tender except when, in the opinion of the appropriate Head of Service / Assistant Director (or equivalent) concerned and the S151 Officer or nominated officer, the financial interest of the Council is better served by disposal by any other means. This could be by public auction

## **16.3 Recording Disposal**

A record of each disposal should be maintained (i.e., the approval, the price obtained and if appropriate the alternative method of disposal used). Inventories or stock records should be updated in a timely fashion to reflect the disposal. Officer decisions for disposals in excess of £50,000 must be published.

## **16.4 Income from Disposal**

Income from disposals shall be credited to the cost centre unless a capital receipt. Capital receipts are sales of assets recorded on the asset register in excess of £10,000, either individually or cumulative. These are credited to the capital receipts reserve and used in accordance with statutory requirements

## **16.5 VAT**

Value Added Tax shall be accounted for on the sale proceeds if appropriate and the amount identified when banking the income. The S151 Officer or nominated officer should be contacted if clarification of the VAT position is required.

## **17. Assets, Property and Estates**

### **17.1. Responsibility of Directors in Relation to Asset Register**

The S151 Officer or nominated officer is responsible for maintaining the Council's asset register and ensuring appropriate accounting treatment of assets. The asset register will include all land and properties owned by the Council recording the purpose for which the property is held, the location, extent and plan reference(s), purchase details where available, details of interest and rents payable and particulars of tenancies of other interests granted. This register is also updated by the assets team as appropriate.

Directors are responsible for ensuring assets within their services are properly managed and safeguarded, notifying finance of any changes (acquisition, disposal, impairment) and ensuring accurate records are maintained

All changes to the asset register must be communicated through the Council's systems.

Assets must be subject to periodic verification to confirm existence and condition, continued operational use and accuracy of asset records. Differences between physical assets and records must be investigated and corrected.

### **17.2. Valuation of Assets**

The S151 Officer or nominated officer shall ensure that all assets are valued in accordance with the latest CIPFA Code of Practice. Valuations must be undertaken on a regular basis in line with accounting requirements, use appropriate professional methodologies and be supported by qualified valuers where required.

### **17.3. Notification of Purchase or Disposal of land and / or buildings**

Any purchases or disposals of property must be actioned on the Council's financial systems and asset registers (including requiring a valuation prior to disposal).

## **18. Security**

### **18.1 Responsibility**

All Heads of Services are responsible for maintaining proper security at all times for all information, buildings, stocks, stores, furniture, equipment and cash under their control. They should report to Facilities Management where they consider security is thought to be defective or where they consider special arrangements are needed.

Appropriate security controls for all assets shall be identified by the risk assessment process and by referring to security standards and procedures. Arrangements shall be agreed as above.

Maximum limits for cash holdings shall be identified by the risk assessment process and agreed with the S151 Officer or nominated officer and shall not be exceeded without permission.

Key holders for safes and similar security receptacles are to be agreed by each Head of Service / Assistant Director (or equivalent) in conjunction with the S151 Officer or nominated officer. The loss of keys shall be reported immediately using the security incident reporting procedures

## **18.2 Data Protection Legislation**

The Chief Executive in conjunction with the Monitoring Officer and in consultation with Heads of Service and the Chief Information Officer, will ensure that all computer systems and written records, (including those in the possession of elected Councillors) which store sensitive personal data are operated in accordance with the Council's Data Protection Policy, Data Protection legislation, and that proper security and confidentiality is maintained

## **18.3 Anti money laundering, bribery and corruption**

All staff must have regard to the Council's Anti-Money Laundering Policy and Anti Bribery and Corruption Policy. A member of staff should consider, in line with the Policy and Guidance, reporting any transaction which involves the receipt of £5,000 or more of cash to the Money Laundering Officer (the Head of Internal Audit); notwithstanding such financial limit, any member of staff who has reasonable grounds to believe that money laundering is taking place (or is being attempted) in respect of a smaller amount of cash should report the matter to the Council's Money Laundering Officer.

Staff should also have regard to the Council's Gifts and Hospitality Protocol. All staff must immediately report to their manager or the Monitoring Officer any circumstances where inappropriate gifts or hospitality have been offered to them

## **19. Insurance**

### **19.1. Responsibility for Insurance**

The S151 Officer or nominated officer is responsible for the arrangement of risk funding on advice from Internal Audit. The administration and resolution of all losses is the responsibility of the nominated officer in consultation with other Officers where necessary by reporting to the S151 Officer or nominated officer.

### **19.2. Record of Insurances**

The S151 Officer will keep a permanent record of all insurances, risks covered, premiums paid and of all self-funded risks and losses paid. This includes third parties arranging insurance where the Council has an insurable interest. Documents to be permanently

retained must include policy schedules and all liability insurance certificates for every period of insurance. Such responsibilities may be delegated to the nominated officer.

### **19.3. Incident / Accident Reporting**

Every event with the potential to give rise to a financial loss, or involving injury to a member of staff, an elected Councillor or client of the Council, must be reported in accordance with the Health & Safety Arrangements Policy.

### **19.4. Review of Risk Financing Arrangements**

The S151 Officer or nominated officer and Internal Auditor shall annually review the Council's risk financing arrangements and look at adequacy of provision in the light of changes in the environment including new legislation, imposed or contractual responsibilities, legal precedent, newly identified and quantified risks, or other concerns identified.

### **19.5. Indemnity**

Before any indemnity requested from the Council is provided, the Head of Service / Assistant Director (or equivalent) responsible shall obtain written agreement from the S151 Officer or the nominated officer. Generally, Heads of Service should not allow burdens or responsibilities to be imposed on the Council through contract that would not otherwise be imposed by common law or statute

The nominated officer shall keep a record of all insurances effected by the council and the property and risks covered, reviewing these annually before the renewal date in conjunction with the council's review of risk management.

## **20. Voluntary Funds**

A voluntary fund is any fund which is held or controlled by the Council as trustee for the benefit of a third party and/or for a specified purpose. Such funds may be administered solely, or in part, by an officer by reason of his or her employment with the Council.

The S151 Officer shall be informed of the purpose and nature of all voluntary funds maintained or managed by any Officer in the course of their duties with the Council.

Voluntary funds registered with the Charity Commissioners must comply with all requirements set by the Commission in respect of the format of accounts and the need for audit or independent examination by a competent person and must meet the timescales set out for such reports.

Voluntary funds not registered with the Charity Commissioners shall have formal accounts prepared and examined annually by a competent person independent of the fund. A copy of the accounts and Independent Examiner's Statement shall be supplied to the S151 Officer immediately after the examination. The S151 Officer shall be entitled to verify that the reports have been made and to carry out such checks on the accounts as he considers appropriate

## **21. Suspension and revision of Financial Regulations**

The Audit Committee shall review these Financial Regulations and following any change of S151 Officer. The S151 Officer shall monitor changes in legislation or proper practices and advise the council of any need to amend these Financial Regulations.

The Audit Committee may, by resolution duly notified prior to the relevant meeting of the Audit Committee, suspend any part of these Financial Regulations, provided that reasons for the suspension are recorded and that an assessment of the risks arising has been presented to all members. Suspension does not disapply any legislation or permit the council to act unlawfully.

The Audit Committee may temporarily amend these Financial Regulations by a duly notified resolution, to cope with periods of absence, local government reorganisation, national restrictions or other exceptional circumstances.

## **22. Training and Documentation**

### **22.1 User Guides**

User Guides and are essential tools which ensures processes are undertaken in accordance with best practice, and in a uniform way across the council

The S151 Officer shall be responsible for ensuring that a suite of user guides covering all key processes is available to officers across the council, and that these are reviewed and updated annually or whenever a process change occurs

### **22.2 Staff training**

Any member of staff required to undertake a process must be given appropriate training before commencing, and at predetermined intervals thereafter.

### **22.3 Inductions and role changes**

Appropriate training shall be given to any new member of staff, and to those changing roles, as an integral part of the induction process

## Appendix A:

## Summary of changes to the Scheme of Delegation and the Financial Procedure Rules

| Changes to the Scheme of Delegations         |                                                                                                                                                   |                                                                                                                                                                                                                        |
|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Area                                         | Summary of change                                                                                                                                 | Impact                                                                                                                                                                                                                 |
| Contract Approvals                           | These have now been incorporated into the Scheme of Delegations                                                                                   | Ensures mechanisms are in place to support the creation of a supplier catalogue underpinned by Contractual Compliance                                                                                                  |
| Revenue Approval - with order                | Revision of limits and levels                                                                                                                     | Aligns approvals with Hierarchy, to support segregation of duties; the system will ensure that authorisation of a proposed order will be routed to someone with greater seniority than the person raising the request. |
| Capital Approval - with order                | Revision of limits and levels                                                                                                                     |                                                                                                                                                                                                                        |
| Amendments to Capital Programme              | Virements added<br>In year externally funded approval split by value                                                                              | Ensures that every key transaction type is subject to regulation.<br>Ensures approval of major externally-funded schemes is a Cabinet decision.                                                                        |
| Treasury Management                          | No change                                                                                                                                         |                                                                                                                                                                                                                        |
| Purchases without an order (Exception forms) | Higher level of approvals; Anything below £150k to be approved by Head of service                                                                 | Reinforces that these are for unforeseen spend only; increased seniority of approvers aids greater control of approval process                                                                                         |
| Budget Virements                             | Approval levels adjusted to ensure quicker Director / S151 involvement<br>Emphasis that approval must be obtained from all impacted service areas | Ensures spend against budget is not obscured by budget virements; aids analysis. Increases control and accountability of budget holders                                                                                |
| Write offs                                   | Team manager approval level removed                                                                                                               | Per new policy. Better control                                                                                                                                                                                         |
| Bid for External Funding                     | No change                                                                                                                                         |                                                                                                                                                                                                                        |
| Purchase Cards                               | Introduction approval levels and spend controls                                                                                                   | Ensures Purchase Card spend is restricted to unexpected, urgent Expenditure. Increases compliance and control.                                                                                                         |
| Use of Reserves                              | S151 responsibility                                                                                                                               | In line with section 25 of the 2003 local government act                                                                                                                                                               |

## **Changes to the Financial Procedure Rules**

### **Overall**

All references to statutory legislation and internal process reviewed and updated

### **Opening background section**

- Greatly expanded to give context for the full review and refresh of the Scheme of Delegation and Financial Regulations
- The need to review and update the Scheme of Delegation and Financial Regulations on an annual basis has been highlighted to safeguard against future obsolescence

The current regulations are over 5 years old. The Finance Transformation Programme, underpinned by the new Unit4 finance system implementation, seeks to embed a multitude of improvements to controls and processes. Updating The Financial Regulations and Scheme of Delegation is therefore critical, as this will ensure that Bury's governance supports the new ways of working.

### **Financial Procedure Rules**

- Definitions section added
- Responsibilities sections added

This section has been expanded to ensure all stakeholders and their responsibilities are defined within the regulations

### **Scheme of Delegation**

- Introduction added

The introduction gives context and clarity as to how the Scheme of Delegations should be applied to Council transactions.

All changes made to the Scheme of Delegation itself, and the rationale for the changes, are listed in the opening table of Appendix A

### **Financial Integrity**

This is a new segment with a focus on measures intended to bolster internal control and risk management

- The key responsibilities of the S151 officer in this regard are outlined
- The segregation of duties section has been expanded to incorporate sales/purchase requests and journals. Segregation of Duties (all material

transactions must be prepared and authorised by separate individuals) is a key control, safeguarding against error or fraud

- A section on system maintenance (including reconciliations, Chart of Accounts maintenance, reporting maintenance and access controls) added, detailing the key controls needed to ensure that system-generated information is accurate and reliable

### **Internal Audit and Internal Control changed to “Accounts and Audit”**

This has been heavily revised

- The regulations regarding Accounting records have been iterated
- The role of Internal Audit, a key independent check and balance for the Council, has been detailed, along with the Council’s responsibilities regarding Internal Audit
- The relevant elements Accounts and Audit regulations have been iterated

### **Financial Planning ‘Accounting’ and the Budget Process changed to “Financial Planning, the Budget Process and Precept Setting”**

- A Financial strategy section has been added giving detail regarding why the MTFS is important and how the MTFS process will work
- A section detailing restrictions to in-year Budget virements has been added. There is currently a culture of making in-year budget adjustments to obscure variances, which needs to change. Original estimations will not always be correct; it is important to learn lessons by analysing variances to help make more informed estimations in future budget iterations
- Greater detail regarding the governance of in-year amendments to Capital programme added
- A section detailing the process for in-year estimates to aid monitoring of Construction works added
- The section on External funding has been expanded to cover all potential scenarios
- A section giving a regulatory overview of the Council’s duties regarding Council tax and setting the Precept has been added

### **Expenditure – Controls**

- The roles and responsibilities of Directors and Budget Holders have been added
- The Monthly Forecasting section has been updated outlining responsibilities and the links to forecasting / MTFS
- Much more detail has been added regarding the protocols regarding high risk budgets, overspends and underspends

- Approval of Expenditure has been linked to Scheme of Delegation and “no po no pay”
- Raising Invoices updated: link to the Scheme of Delegation ; Purchase Requisitions must be linked to the supplier catalogue or, for unplanned expenditure, using Exemption forms or Purchase cards.
- The updated Goods Received Note Process added – invoices may only be paid once confirmation the goods or services have been received
- Coding of Expenditure & Income updated and linked to the updated Journal Governance
- The De-Minimis limit for Capital Expenditure has been included
- The section covering the use of Reserves has been updated to include the relevant statute and definition

### **Procurement**

A new procurement section has been added, to reflect the critical role Procurement will now play in our purchasing goods and services, with the key sections being;

- A section detailing the Controls, Governance and Processes required to effectively operate Bury's new Supplier Catalogue
- Details regarding statutory obligations regarding Contracts, and the links between Contract Authorisations and the Scheme of Delegations link
- A section detailing the Financial controls in relation to contracts has been added

### **Banking and Payments**

Additional detail has been added regarding;

- Adding extra control governing the Council's banking arrangements (adding new bank accounts)
- Bury's 30 day payment terms have been referenced
- Updated controls governing the authorisation of invoices, re-iterating that the old valid routes are via appropriately authorised purchase orders (for most expenditure), or Exemption forms and purchase cards for unexpected expenditure
- Detail regarding the processing of CIS invoices has been added
- A section restricting the amendment of invoices has been added
- The safeguarding section has been updated to include dual authorisation (Segregation of Duties) and supporting reconciliations

### **Purchase Cards**

A new Purchase Card section has been added to introduce controls and governance regarding their use, with the key sections being;

- Signposting the Purchasing Vard Policy

- Outlining the intended circumstances under which Purchase Cards may be used
- Outlining the eligibility criteria for potential Card Holders, and the protocol to follow should there be any relevant changes in the cardholders circumstances
- Signposting links to the authorisation levels within the Scheme of Delegations
- Compliance; ensuring transactions are coded correctly and all VAT implications are accurately identified and recorded

### **Local Bank Accounts – Imprest / Petty Cash Accounts**

There are no material changes to this section

### **Payment of Salaries and allowances**

- Details of the relevant Statute have been added
- A good deal more definition has been added to include all potential transactions, such as termination payments, and the controls and reconciliations required to give appropriate assurance against error or fraud

### **Treasury Management**

- Appropriate reference to the CIPFA Treasury Management Code, relevant statutory requirements and the Council's Treasury Management Strategy has been added
- Detail concerning compliance requirements in relation to Borrowing and Investmentss has been added
- A Cashflow forecasting section added, highlighting the link between accurate forecasting and the efficient use of council borrowing and investments

### **Income**

- The requirement to raise invoices within 30 days of the chargeable activity being delivered or in advance where appropriate has been referenced
- The need and responsibility to ensure all transactions receive the correct VAT treatment has been highlighted
- A section outlining the maintenance and governance of a full Fees and charges schedule section has been added
- A section detailing the income monitoring requirements has been added

### **Write offs**

- The write off policy has been signposted and added as an appendix

- The approval limits for debt write offs, which are set out in the Scheme of Delegations has been referenced, alongside detail of the relevant processes and link to Bad Debt provisions
- A section detailing the monitoring requirements of Bad Debt write-offs has been added

### **Stocks / Stores**

There are no material changes to this section

### **Disposals**

There are no material changes to this section

### **Assets Property and Estates**

There are no material changes to this section

### **Security**

There are no material changes to this section

### **Insurance**

There are no material changes to this section

### **Voluntary Funds**

There are no material changes to this section

### **Suspension of Financial Regulations**

This section has been added to identify exceptional circumstances which may lead to suspension of the Financial Regulations

### **Training and User Documentation**

This section has been added to highlight the need for continuous staff training, a requirement to ensure ongoing compliance with best practice and these Financial regulations; key sections are

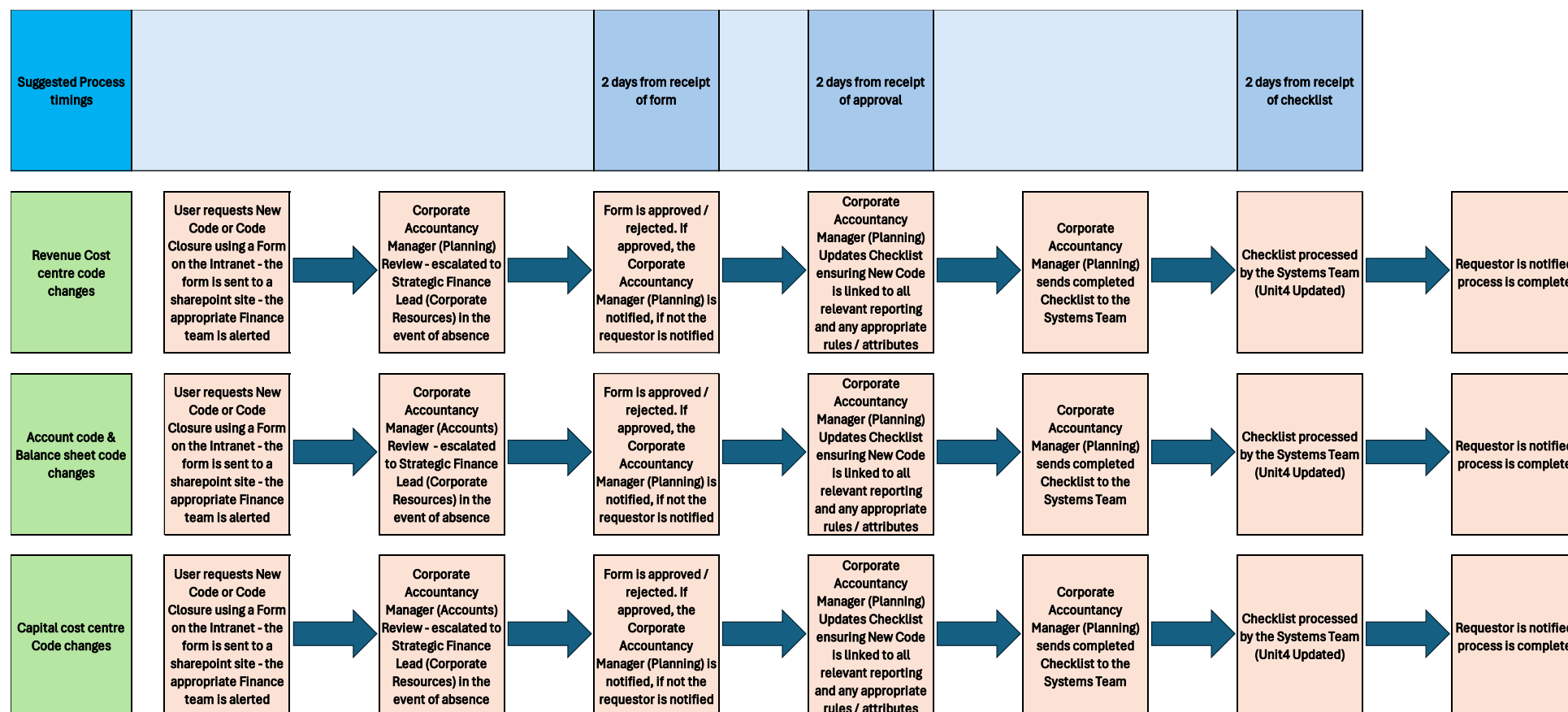
- The creation and maintenance of a suite of user guides covering all key processes is available to officers across the council, and that these are reviewed and updated annually or whenever a process change occurs

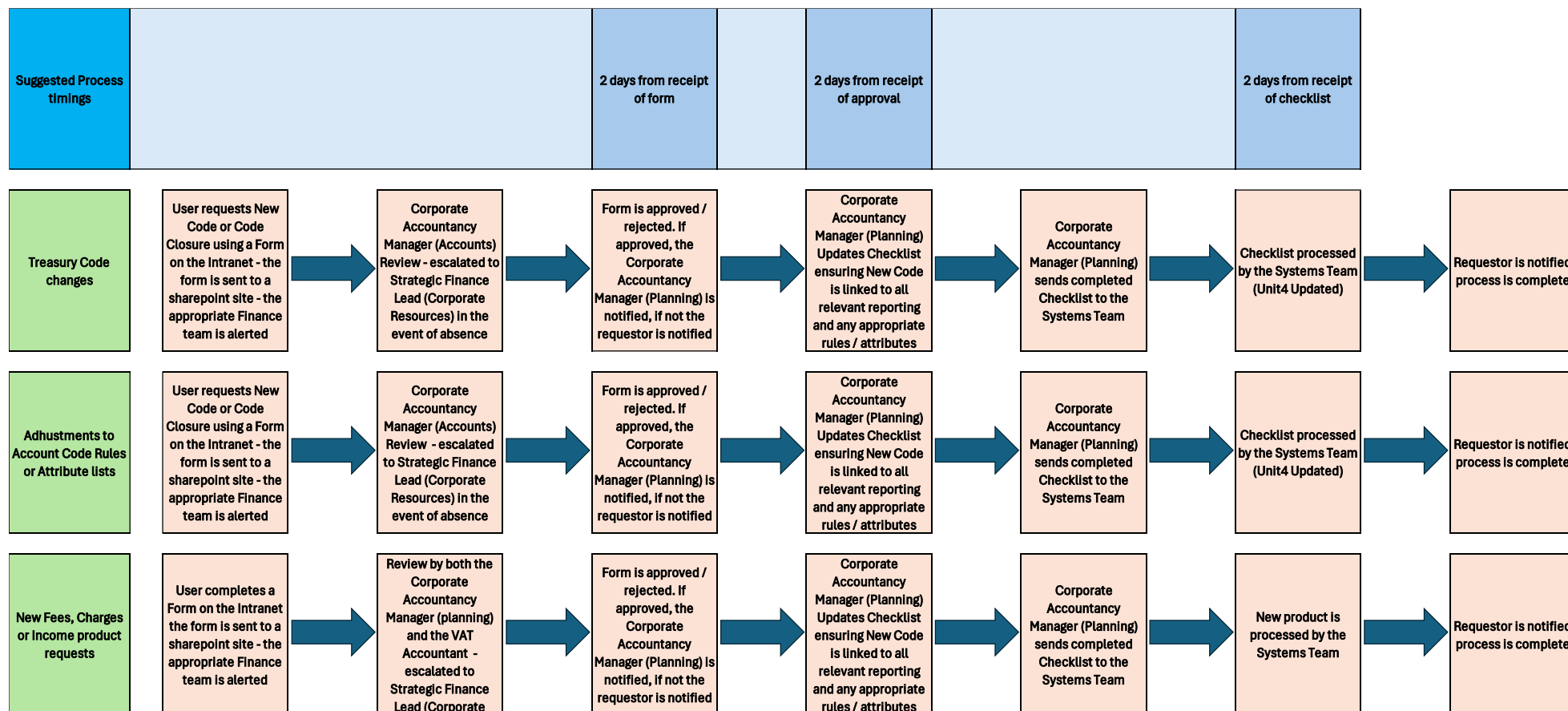
- The need for appropriate training to be given to any officer before they undertake any processes required as part of their role
- The need to routinely incorporate training as an integral part of the Induction of new staff, or Role Changes of existing staff

## Appendix B: Journal Approvals

| BURY COUNCIL JOURNAL APPROVALS |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                   |                                                                                             |
|--------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------------------------------------------------------|
| Approval Level                 | Finance Roles / Levels                                                                      | Standard Journal                                                                            | Technical                                                                                   | HR Payroll                                                                                  | CSSC Recharges                                                                              | Capital Recharges (Service Revenue Side)                                                    | Schools Recharges (service side)                                                            | Internal Department charges                                                                 | Accruals Journal (service side)                                                             | Accruals Journal (balance sheet side)                                                       | Schools Recharges (schools side)  | Capital Recharges (Capital Side)                                                            |
| < £10,000                      | Principal Finance Business Advisor / Principal Corporate Accountant                         | Principal Finance Business Advisor / Principal Corporate Accountant                         | Corporate Finance Pool for approvals                                                        | Principal Finance Business Advisor / Principal Corporate Accountant                         | Corporate Finance Pool for approvals                                                        | Principal Finance Business Advisor / Principal Corporate Accountant                         | Principal Finance Business Advisor / Principal Corporate Accountant                         | Principal Finance Business Advisor / Principal Corporate Accountant                         | Principal Finance Business Advisor / Principal Corporate Accountant                         | Corporate Finance Pool for approvals                                                        | Head Teachers (Per UNIT 4 Access) | Corporate Finance Pool for approvals                                                        |
| £10,001 - £50,000              | Senior Business Partner / Corporate Accountancy Manager                                     | Senior Business Partner / Corporate Accountancy Manager                                     |                                                                                             | Senior Business Partner / Corporate Accountancy Manager                                     |                                                                                             | Senior Business Partner / Corporate Accountancy Manager                                     | Senior Business Partner / Corporate Accountancy Manager                                     | Senior Business Partner / Corporate Accountancy Manager                                     | Senior Business Partner / Corporate Accountancy Manager                                     |                                                                                             |                                   |                                                                                             |
| £50,001 and over               | Strategic Finance Lead                                                                      | Strategic Finance Lead                                                                      |                                                                                             | Strategic Finance Lead                                                                      |                                                                                             | Strategic Finance Lead                                                                      | Strategic Finance Lead                                                                      | Strategic Finance Lead                                                                      | Strategic Finance Lead                                                                      |                                                                                             |                                   |                                                                                             |
| Substitute Requirements        |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                                                                             |                                   |                                                                                             |
| <£50k                          | Go to next level above                                                                      | Go to next level above                                                                      | Go to next level above                                                                      | Go to next level above                                                                      | Go to next level above                                                                      | Go to next level above                                                                      | Go to next level above                                                                      | Go to next level above                                                                      | Go to next level above                                                                      | Go to next level above                                                                      | N/A                               | Go to next level above                                                                      |
| >£50k plus                     | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) | N/A                               | Assistant Director of Finance (For all levels above £50k - Substitute for SFL annual leave) |

## Appendix C: Chart of Accounts Maintenance







## **PURCHASE CARD POLICY v1.4 Final**

Date: 2<sup>nd</sup> July 2026

Subject: Purchase Card Policy

Report by: Kevin Fletcher - Interim Head of Procurement

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### **1. Purpose of the Policy**

Purchase Cards, including physical and virtual cards, are a strategic procurement control that enables efficient purchasing, reduces internal purchase-to-pay overheads, and supports Council's in achieving their compliant payments targets. When governed effectively, they strengthen financial control, support supplier cashflow, and help the Council consistently achieve its prompt payment and audit assurance objectives, while complementing formal contract and procurement arrangements.

This policy sets out the rules and controls governing the use of Purchase Cards (Physical P-Cards) and Virtual Cards to ensure that expenditure is:

- Properly authorised and recorded
- Fully compliant with VAT, financial regulations, this policy and Contract Procedure Rules; and
- Transparent, auditable, and subject to robust corporate oversight

The policy implements recommendations arising from the Purchase Card Expenditure Internal Audit Report and adopts the Lloyds Bank Purchase Card system as the Council's primary mechanism for all purchase card management, monitoring, and compliance.

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### **2. Scope**

This policy applies to:

- All staff issued with a physical Purchase Card
- All transactions conducted using a Purchase Card (Physical and Virtual card)

- Line managers, budget holders, Procurement, Finance, and Audit teams involved authorisation and oversight

Physical Purchase Cards must only be used where no suitable corporate contract, framework, or purchase order process is available and where use represents value for money. P-Cards must not be used as a substitute for planned procurement or contract spend.

Examples of scenarios where P-Card may be permitted:

- Urgent / Out of hours purchases
- Situations where PO systems are impractical e.g. Subscriptions

Physical cards must not be used to circumvent the Contract Procedure Rules.

---

### **3. Purchase-Cards (P-Cards)**

There are two types of Purchase Cards in use across the Council:

- Physical Card
- Virtual Card

Physical purchase cards is a named, chip and pin payment card issued to a staff member for authorised business expenditure. Physical P-Cards are provided through the Lloyds Bank Purchase Card system and remain the property of the Council at all time

Virtual Purchase Cards are as the name suggests – an electronic way of paying Suppliers via the Lloyds P-Card system to support secure, controlled, and efficient purchasing where a physical card is not required. Virtual Cards are intended to reduce risk, improve control, and enhance auditability, particularly for online, one-off, or supplier/Contract specific transactions.

All use of Virtual Cards is subject to the same governance, compliance, and audit requirements as physical Purchase Cards, unless explicitly stated otherwise in this policy.

Both cards under the Greater Manchester contract attract a 1.22% rebate for the Council.

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## **4. Governance and Responsibilities**

### **4.1 Eligibility for a purchase card**

It is the Line Managers discretion and based on business need to nominate staff for assignment of a P-card.

All requests should have a valid and sound business case for application of the P-card

All requests should have single transaction and monthly spend limits identified. The transaction and monthly spend limits are detailed in Appendix 1

All requests must be approved by the individuals line manager or designated department approver of P-cards. The request will then also be reviewed and approved by Procurement to ensure that appropriate levels of transaction and monthly levels of spend are allocated.

A cardholder must be a permanent member of staff who has worked for Bury Council for a period of at least six months and must also have completed the probation period.

Unless there are exceptional business needs, cards must not be allocated to temporary staff. In special circumstances when an exception can be justified and a member of staff requires a P-card to carry out the nature of their work written approval from a chief officer can waive these rules.

## 4.2 Cardholders

Cardholders are responsible for:

- Using the card strictly in accordance with this policy
- Ensuring all transactions are legitimate, business related, and appropriate
- Uploading a valid VAT receipt or invoice to the Lloyds P-Card system for every transaction
- Reconciliation within 5 working days of statement
- Completing mandatory training prior to card activation and periodically thereafter.

## 4.3 Line Managers

Line Managers must:

- Approve the issue of Purchase Cards
- Review transactional activity for appropriateness and compliance
- Ensure that the cardholder keeps up to date with transaction processing.
- Support escalation where transactions remain unauthorised
- Report any problems that the cardholder is experiencing to the Department Administrator.
- Identify personal transactions, and report these promptly to the Departmental Administrator

- Report changes in the cardholders' circumstances that might affect their card use (such as name or job changes, long term sickness, and maternity leave) promptly to Procurement

Via the Lloyds card management system

- Approve the cardholders transactions via the card management system within 10 working days once these have been reconciled by the cardholder. Where approvers do not approve the cardholders transactions every month, this will be reported to the approvers line manager. Repeated failure to approve transactions will be reported to your Chief Officer and may result in your cardholder having their card removed which may affect your service delivery
- Ensure that the cost centre and subjective codes are correct.
- Review all receipts to ensure compliance with the policy on items purchased before approving and that the receipts submitted are valid and match to the transactions on the submitted statement.
- Ensure VAT receipts are obtained and that VAT is correctly reconciled to ensure the Council can claim back the VAT (gross amounts will be charged to cost centre where no VAT receipt is obtained). It is vital that VAT is set correctly as any fines incurred from HMRC due to incorrectly coded VAT on the cards will be charged back to the department cost centre.
- Ensure that leavers or role change are reported to Departmental Administrators and the P-card is returned to Procurement as soon as possible before the cardholder leaves their post.
- In the event of misuse of a P-card, the cardholder and approver are responsible for ensuring that appropriate and timely action is taken to:
  - Inform Lloyds as soon as misuse is identified
  - Inform Procurement
  - Inform Departmental Administrator (Finance)
- Ensure that any loss associated with such misuse is recovered promptly. Cardholders and Approvers need to take all appropriate steps to ensure that P-card transactions are for valid business reasons, and that failure to ensure appropriate checks are made may be investigated in accordance with Bury Councils disciplinary & dismissal procedure. As an approver, you and your cardholder may be audited by Internal Audit to ensure that you are complying with the relevant corporate policies.

**If you are unsure what the transaction is for or why the money has been spent, then this should be clarified and challenged when appropriate before approving. Remember: this is being charged to your budget, you are responsible for authorising any expenditure against your budget and ensuring Council funds are being spent appropriately and correctly.**

## 4.4 Finance

Finance is responsible for:

- VAT compliance checks and reconciliation
- Oversight of financial reporting and compliance with Financial Regulations
- Undertaking additional VAT compliance checks as part of VAT returns

## **4.5 Procurement**

Procurement will:

- Own the Policy and responsible for regular reviews and any amendments
- Monitor Purchase Card expenditure corporately using Lloyds system data
- Identify expenditure that should be routed through existing contracts or frameworks
- Work with services to reduce inappropriate P-Card spend
- Review limits annually
- Manage the cards – leavers, change or role etc once informed by service users
- Setup and authorise any expenditure on Virtual cards in line with Scheme of Delegation.
- Escalate any issues to the S151 Officer

## **4.6 S151 Officer**

The S151 Officer has overall responsibility for the financial control requirements set and any amendments must be approved by the S151 Officer.

---

# **5. Issue and Training Requirements**

## **5.1 Mandatory Training and Agreement**

Before a Purchase Card is issued:

- Cardholders must complete P-Card training and sign this policy declaration
- Cardholders must confirm, via the Lloyds system, that they have read and understood:
  - This P-Card Policy
  - The training guidance and procedures

For existing cardholders, completion of training and acceptance of this policy declaration are mandatory. Failure to comply will result in suspension of the card.

Training guides in the format of video and paper guides are available on the Procurement Intranet page

### [Purchasing cards](#)

The video guides are here for Commercial Card Internet Servicing (CCIS) and Commercial Card Data Management (CCDM): [Your Commercial Card Solutions | Lloyds Bank Business](#)

CCIS is the live system which shows declines, cardholder personal details (address etc.) and the videos for CCIS are mainly for administrators.

Cardholders will undertake the CCDM training, which is where they will code transactions, can see how much limit they have.

The Lloyds CCDM mobile App is available for both Apple and Android devices and can be downloaded directly from the Apple and Google Play store. The App makes it simple to complete all your expense tasks on the move.

Cardholders can also register for CCIS but it may not be strictly necessary if they have the CCDM access as that will also show what activity is happening on the card.

## **5.2 Audit Trail**

The Lloyds P-Card system will be used to:

- Record training completion
- Capture policy acceptance
- Provide a clear audit trail
- Report on expenditure to ensure only used where appropriate

Failure to complete training or confirm policy acceptance will result in automatic card suspension.

---

## **6. Use of the Lloyds P-Card System**

The Lloyds P-Card system is the primary corporate control system and will be used to:

- Upload and store receipts and invoices
- Monitor transaction authorisation
- Enable corporate spend analysis
- Support audit, reconciliation, and reporting

Unit4 will be used for financial posting only; transactional compliance and monitoring will be managed through Lloyds.

## 7. Receipts, Invoices, and VAT Compliance

- A valid receipt or VAT invoice **must be uploaded for every transaction**, with no exceptions.
- Transactions without supporting documentation will not be compliant.
- VAT must be correctly identified, coded, and accounted for on all transactions.
- Lloyds system controls will be used to ensure transactions cannot be completed without documentation.

Finance will perform additional VAT compliance checks as part of the VAT return process.

---

## 8. Transaction Authorisation and Escalation

### 8.1 Authorisation Timescales

All transactions must be authorised within the relevant statement period and when supporting documentation has been uploaded,

### 8.2 Escalation Process

Notification reminders can be configured within the Lloyds system at frequencies ranging from daily to several months as determined by the Council.

For the purposes of this Policy, weekly automated reminders will be issued to all cardholders who have not coded their transactions.

Where transactions remain uncoded at the end of the month a configurable system email from the S151 Officer will be issued reminding users of their obligations under the policy.

- Weekly reminders will be issued
- Transactions outstanding after one month period will trigger an automated reminder from the S151 officer.
- Where non-compliance persists, the Purchase Card will be suspended, unless approved as exempt for operationally critical purposes (e.g. emergencies), which must be documented.

Automation within the Lloyds system will be used to reduce manual intervention.

---

## 9. Monitoring and Corporate Oversight

Procurement, Finance and Internal Audit will have access to Lloyds P-Card reporting dashboards. CCDM will be the reporting portal: [Lloyds Bank | Log in](#)

- Purchase Card expenditure will be reviewed on a bi-monthly corporate basis.
  - Spend patterns will be analysed to:
    - Reduce inappropriate card usage
    - Identify opportunities to channel spend through approved contracts
    - Highlight non-compliance or emerging risks
- 

## 10. Prohibited Use

Purchase Cards must not be used for:

- Personal expenditure
- Splitting transactions to bypass limits
- Transactions that circumvent Contract Procedure Rules
- Off contract spend categories such as IT, Agency, Stationery etc
- Purchases available through existing contracts without prior approval
- Gifts/Rewards for staff (including flowers)
- Cash withdrawals or Money transfers

Misuse may result in disciplinary action.

---

## 11. Purchase Card Security

To reduce the risk of fraud, Cardholders should:

- Sign their new card immediately.
  - Never lend the card or card number to anyone.
  - Never send card details via e-mail.
  - Card holders should treat the security of P-card as they would their own personal card
  - Never give out your PIN to a third party when purchasing on the internet and only use secure sites.
  - Ensure the P-card is always kept in a secure location that only the card holder can access. Leaving cards on your desk could pose a serious security risk for potential fraud or theft, and if lost or stolen due to negligence may result in disciplinary action.
  - Always check the total on the sales voucher is correct before you sign or entering your PIN for transactions.
  - If found after it is reported stolen, destroy the card and dispose of securely
-

- Do not leave receipts with card number unattended.
- 

## 12. Reporting A Lost, Stolen or Misuse of a Purchase Card

Bury Council operates a “zero tolerance” approach towards fraud. Any deliberate misuse of a P-card will result in disciplinary action in accordance with the relevant Policies including this Purchase Card Policy.

Cardholders and their authorising managers are responsible for reporting the loss, theft or misuse of a P-card, by informing Lloyds and emailing [purchasingcards@bury.gov.uk](mailto:purchasingcards@bury.gov.uk). You should also notify your line manager as soon as you are aware your card is missing or as soon as you become aware of unusual transactions on your account.

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## 13. Cardholder Absence

There may be instances when the deadline for all coding and paperwork falls during a period of short-term absence, for example, annual leave. If you know that there is going to be a deadline while you're away, then you should update all transactions on the system and submit for approval before you go on leave. If the absence is likely to take you well beyond the deadline, temporary arrangements should be made by advising the administrators.

---

## 14. Approver Absence

If your approver is absent and your statement and transactions need to be authorised, then you must identify a temporary approver – this can be someone in your team/department who has the financial delegation to sign off card transactions. Please make sure that you notify Procurement if this happens

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## 15. Suspension and Withdrawal of Cards

Cards may be suspended or withdrawn where:

- Training or policy acceptance is not completed
  - Receipts are repeatedly not supplied
-

- Transactions remain unauthorised
- Misuse or control breaches are identified

---

## 16. UK GDPR Data protection Act 2018

In the course of applying for, and using, a P-card, personal data about you will be processed by Lloyds Bank PLC (the card provider). This includes:

- Your name, and who you are employed by
- Your work contact details (address, email address, telephone number)
- Your date of birth
- Your staff/payroll number
- Any proof of identification deemed necessary in order to process your application.

To obtain a P-card, you must consent to your personal data being processed by Lloyds Bank PLC in accordance with the UK GDPR Data protection Act 2018 and the Lloyds Bank privacy statement ([www.lloydsbank.com/privacy2.asp](http://www.lloydsbank.com/privacy2.asp)).

Such processing includes using your personal data to manage your application for a P-card and providing the required P-card services (e.g., access to online transaction systems). This may include checking your personal data against electoral registers, credit reference agencies and/or fraud prevention agencies.

Unless you opt-out, Lloyds Bank PLC may share your personal data, both within and outside of the Lloyds Banking Group, for the purpose of direct marketing.

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## 17. Transparency

In accordance with the Local Government Transparency Code 2015, Bury Council may publish P-card transactions on our website including transaction date, transaction reference, merchant category and the amount spent.

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## 18. Freedom Of Information

Under the Freedom of Information Act the public has the right to request any information held by Bury Council

## 19. Application For Card and Increase/Decrease of Limit

To apply for your card or to amend your card limit on either temporary or permanent basis please contact Procurement via [purchasingcards@bury.gov.uk](mailto:purchasingcards@bury.gov.uk)

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## 20. Review and Compliance

This policy will be:

- Reviewed annually by Procurement
- Updated in line with audit findings, regulatory changes, and system improvements

Compliance with this policy is mandatory. Breaches may be subject to investigation and disciplinary action.

Internal Audit will periodically review compliance.

---

## 21. Contact Details

| NAME           | EMAIL                                                                        |
|----------------|------------------------------------------------------------------------------|
| Procurement    | <a href="mailto:purchasingcards@bury.gov.uk">purchasingcards@bury.gov.uk</a> |
| Internal Audit | <a href="mailto:Internal-Audit@bury.gov.uk">Internal-Audit@bury.gov.uk</a>   |

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## 22. Declaration

This declaration covers the initial card issue, annual compliance with policy and any subsequent cards issued for cards lost, stolen, expired, damaged or replaced.

I have read and understood Bury Council's Purchase Card Policy

### CARDHOLDER

Card Holder Name (Print): \_\_\_\_\_

---

Job Title: \_\_\_\_\_

Department: \_\_\_\_\_

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

**APPROVER**

Approver Name: \_\_\_\_\_

Job Title: \_\_\_\_\_

Approver Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Please return the fully completed and authorised document to [purchasingcards@bury.gov.uk](mailto:purchasingcards@bury.gov.uk)

# **APPENDIX 1 – TRANSACTION AND MONTHLY LIMITS**

| Transaction Value | Card Limit | Card User                   | Card Authoriser |
|-------------------|------------|-----------------------------|-----------------|
| 200               | 2,000      | Nominated operational staff | Head of Service |
| 500               | 5,000      | Head of Service             | Director        |
| 10,000            | 50,000     | On call emergency manager   | Exec Director   |

# Bury Council Write Off Policy April 2026

## Introduction

The purpose of this new policy is to provide a corporate approach to the writing off of bad and irrecoverable debts whilst seeking to maximise the opportunity for collection thereby minimising the need for write off. The policy also establishes a disciplined approach across the Council for the writing off of those debts that are not recoverable. It establishes clear guidance for all Council Officers on the recording, reporting, recovery and monitoring of the Council's debt and income.

Section 151 of the Local Government Act 1972 requires that local authorities make arrangements for the proper administration of their financial affairs. Part of these arrangements includes establishing a Policy for the writing off of irrecoverable debts. These arrangements are underpinned by Part 4 Procedures Rules, Section 6 Financial Regulations of the Council's constitution.

## Objectives

This Policy has the following objectives:

- To promote a consistent and fair approach to the writing off of debt across the Council,
- Enable debts to be written off in a timely and efficient manner, •
- Provide a framework that sets out the criteria for writing off debt.

## Outcome

The outcomes expected from this policy:

- Minimise the level of write off necessary,
- To ensure cases recommended for write off are done so every quarter,
- Minimise the level of resources provided for bad and irrecoverable debts,
- Standardise the write off process across all income and debt areas,
- Avoid the use of subjective judgement and criteria when considering cases for write off, by providing clear objective criteria and procedures,
- Introduce effective performance management arrangements,
- Help focus resources on potentially recoverable debts (by disciplined writing off of irrecoverable debts),

## Debts covered by this Policy

For the avoidance of doubt this policy document applies to all debts and income due to the Council including but not limited to the list below, and include any other debts across the Council:

- Council Tax,
- Business Rates,
- Housing Rents
- Sundry Debts (incl. Commercial Rents, service charges and insurance, licensing, fees, statutory notices, subscriptions, etc.),
- Adult Social Care,
- Housing Benefit Overpayments

## General Collection Policy

It is Council policy to pursue the collection of all debts owed to the Council as vigorously as possible. Every effort will be made to recover any Council debt before write off is considered. Service Areas will work together, where appropriate to do so share data, to make informed decisions about debt recovery and write off.

This policy supports the decision process for debts that may have become uneconomical to pursue or are irrecoverable.

It must be noted that a debt may be written off but can be reinstated if deemed recoverable at a future date and is appropriate to do so.

The policy will be reviewed as required to ensure processes remain fair and in line with legislation and best practice.

The policy may be extended to include other forms of revenue and income collected by the Council.

## General Principles

The general principles adopted in this policy are as follows:

- To ensure a professional, consistent and timely approach to debt write off across all of the Council's functions,
- To promote, where Data Protection legislation allows, a coordinated approach towards sharing debtor information internally and managing multiple debts owed to the Council,
- To ensure that debts are managed in accordance with legislative provisions and best practice,
- To ensure that any steps taken to recover debt / income are in line with the Council's corporate policies.

## Delivering the Policy

Writing off of debt should be undertaken in accordance with the Council's Financial Procedure Rules, as outlined within the financial limits contained within the Council's constitution.

Adult Social Care debt write offs must be carried out in accordance with Annex D of the Statutory Guidance to the Care Act 2014.

Delivering the policy involves a number of processes which are explained in more detail below:

- Ensuring a consistent approach,
  - Pre-request for write off,
  - Request for write off,
  - Writing debts off,
  - Reinstating written off debt,
  - Evasion and fraud,
  - Credit balance write offs, • Dealing with historical debts.
  - Insufficient Evidence to Enforce Debts
  - Bad debt provision,

## Ensuring a consistent approach

In line with this policy, the Council will have a consistent approach across all directorates in responding to debt write offs. Proposal for write offs should be considered at every appropriate stage in line with the framework.

## Pre Request for Write Off

All debts of the Council will be acted on in accordance with its Financial Rules. If the debt remains unpaid, after exhausting all appropriate recovery methods, the debt should be considered for write off. All requests to write off debts must be approved by authorised officers and within the approval thresholds set out in this policy.

The Service Area will take reasonable steps to contact the debtor to discuss the matter before making any final decisions on recovery actions, of which, write off may be considered as an option based on the circumstances of the debtor. As a result of these discussions, or in the view of the service area, if the debt is considered uneconomical to pursue or considered irrecoverable then the service area may propose the debt for write off.

A debt may be written off when one or more of the following apply (this list is illustrative and not exhaustive):

- Council error – The debt was caused by a local authority mistake, and the debtor could not reasonably have known about it.
- Deceased debtor – The debtor has died and there are not enough funds in the estate to clear the debt.

- Low-value debt – The total debt is under £50 and no payment has been made within six months of the final reminder.
- Custodial sentence – The debtor is serving a prison sentence of 12 months or more and recovery is unlikely.
- Debtor untraceable – The debtor cannot be located for at least six months.
  - (The Council may reinstate the debt if the debtor is later found.)
- Debtor overseas – The debtor is living abroad, and the law does not allow the Council to enforce recovery.
- Statute-barred debt – The debt cannot legally be pursued due to the time limits set out in legislation.
- Debt Collection Agent unable to recover – All recovery options have been exhausted, and the agent confirms the debt is unrecoverable.
- Legal advice – Legal Services advise that the debt is not recoverable or that legal action would not be cost-effective.
- Uneconomical to collect – The cost of recovery would exceed the value of the debt.
- Bankruptcy or liquidation – The debtor is declared bankrupt, or a company has gone into liquidation.
- Company arrangements – A Company Voluntary Arrangement (CVA) or administration order prevents or limits recovery.
- Financial hardship or vulnerability – Recovery action would cause serious financial difficulty, or the debtor is considered vulnerable or in hardship.
- Multiple debts with limited means
- Where the debtor owes several debts to the Council and a financial assessment shows they do not have sufficient means to pay them all, consideration may be given to writing off some debts to support sustainable repayments.
- Evidence of financial circumstances is required. If the debtor fails to maintain the agreed payment plan, the write-off may be reversed.
- Insolvency confirmation – The Official Receiver or Administrator confirms there is no prospect of settlement.
- All recovery options exhausted – No further recovery actions are available.
- Court remission – The court has formally remitted (cancelled) the debt.

Write off is a formal process and when authorised, ceases all debt recovery action for that specific debt, albeit recovery action may continue for other debts connected to the debtor.

Where authorised, a request for write off does not mean the debt cannot be reinstated in future, where appropriate. The write off will be removed and action will continue giving weight to the statute of limitations, and corporate debt management.

## Request for Write Off

As per the Accounts and Audit Regulations 2003 (as amended), debts should only be written off with approval of the responsible finance officer (S151), or such members of staff, where this function has been delegated in line with the current Financial Regulations and Financial Delegations.

Write off proposals and subsequent decision papers will be retained for the current year plus six years as per the Council's Record Retention Policy.

Once appropriate authorisation has been received and final authorisation for the write off obtained from the Director of Finance (S151 Officer) or delegated officers, the debt will be removed from the relevant accounting system and charged against the appropriate cost centre/fund.

Write offs of Housing Benefit caused by an Official Error where the debt has been determined as unrecoverable can only be made in conjunction with the relevant Housing Benefit legislation and guidance.

Any write off relating to Adult Social Care debt is governed by the Care and Support Statutory Guidance Annex D, in addition to the above process.

## Writing Debts Off (framework)

The writing off of debt should be administered in accordance with the Council's Financial Procedure Rules, as outlined in the Financial Limits contained in the Council constitution.

Irrespective of the amount to be written off, the following list of exceptions\* is delegated to Heads of Service to authorise write offs. Write off of debts in accordance with the list of exceptions will be reported quarterly to the Council's Finance Board & S151 Officer.

*\*Evidence is required under the following categories (outlined below).*

List of exceptions:

- Death of the debtor
- The debtor has passed away and there are no assets in the estate to cover the debt, the remaining balance may be written off.
- \*Written confirmation of this is required from a solicitor or executor.
- Bankruptcy or Liquidation
- A debtor has been declared bankrupt (individual) or has entered liquidation (company), creditors may only receive a portion of the owed amount, or nothing at all, depending on the available assets.
- \*Bankruptcy or Liquidation number or documentation should be provided
- Debt Relief Order granted to the Debtor.
- \*Appropriate entry in the Insolvency Register or documents should be provided,
- Individual Voluntary Arrangement.
- \*Appropriate entry in the Insolvency Register and documents should be provided,

- Company Voluntary Arrangement / Administration Order.
- \*Appropriate documents should be provided,
- Debt remitted by court.
- \*A statement to confirm the decision of the court is needed.
- Debtor living abroad.
- The debtor is believed to be living overseas, and the legislation does not permit debt pursuance.
- \*Evidence to confirm this position is required

Once appropriate authorisation has been received and final authorisation for the write off obtained from the Director of Finance (S151 Officer) or delegated officers, the debt will be removed from the relevant accounting system and charged against the appropriate cost centre/fund and bad debt provision.

## Authorised officers and approval thresholds

The following Scheme of Delegation is in place for authorised officers to write off debts owed to the Council.

Authorisation to write off\* is delegated, after all appropriate recovery options have been exhausted.

| Value                                          | Approval Required                                                           | Reported to             |
|------------------------------------------------|-----------------------------------------------------------------------------|-------------------------|
| Up to £10,000                                  | Head of Service                                                             | Director                |
| In excess of £10,000 but not more than £25,000 | Responsible Director in consultation with the Assistant Director of Finance | S151 Officer            |
| In excess of £25,000 but not more than £50,000 | S151 Officer in consultation with the Monitoring Officer                    | Relevant Cabinet Member |
| In excess of £50,000                           | Cabinet                                                                     |                         |

\*Excluding the list of exceptions detailed in the Writing Debts Off (framework).

## Reinstating Written Off Debt

Service Areas must be aware of an individual's circumstances during all financial related dealings, and this includes being aware of any current and written off debt(s) that the debtor may have.

Where a debtor's circumstances change and the original grounds for writing off the debt no longer stand, the Council reserves the right to reverse the write-off and pursue the outstanding amount through normal recovery procedures.

## Fraud and Misrepresentation

If an allegation or suspicion of fraud arises, the Council will investigate the matter. Should fraud be established, the Council may reverse the write-off and pursue criminal proceedings where warranted.

## Credit Balance Write Offs

When an account is closed and a credit balance remains, the credit must be checked against any other debts owed to the Council and, where appropriate, offset against those debts. If the credit is repayable, it will be refunded by BACS where bank details/address are known.

Where no forwarding address is available, reasonable efforts must be made to identify the correct address for repayment. If no address can be found, the credit will be removed from the account. If an address is identified at a later date, the credit may be reinstated, offset against another outstanding debt, or refunded where no other debts exist.

## Dealing with Historical Debts

Historical debts will be dealt with outside of this policy. A separate procedure will be designed for this which will be subject to separate approval.

## Insufficient Evidence to Enforce Debts

Where there is insufficient evidence to create a debt then these amounts should not be raised at the outset by either the service or finance staff. It is always important to consider this at the inception of raising a debt and whether the funds can or cannot be successfully recovered.

If a debt is raised and then subsequently with the passage of time, the debt becomes not credible either on the challenge of the debtor or because there is insufficient evidence to support the debt, then this debt should be removed from the finance system by way of a credit note. This will effectively remove the debt from the Council's aged debt portfolio and reduce it to nil.

It is important that where any debts fall into this area that they follow the credit note process, and not the debt write off route. Debts that should not have been raised or cannot be supported should not be written off.

Any debts raised which fall into the recovery process which later require a credit note will be collated and reported quarterly to the Finance Board & S151 Officer. Service Area's responsible will report need to report why the debt was raised, why it is not being pursued and the steps which have been put in place to avoid a reoccurrence.

## Use of Third Party Collection Services

Where appropriate to do so, and prior to the submission for write off, debts of £300 or more should be considered for referral to the Council's appointed collection agent who will undertake further checks to determine if the debt can be traced and / or collected.

- Trace and collect – where a forwarding address cannot be determined, further checks will be made with third parties to determine if address information

can be found. This is a further check, prior to write off, to support the write off recommendation,

- Collection of debts where all internal remedies to collect have been exhausted. The debt will be passed to a third party collection agent, who will attempt to secure payment in line with appropriate legislation/contractual arrangements in place.

## Bad Debt Provision

The Director of Finance (S151 Officer) in conjunction with Heads of Service must ensure there is adequate provision for bad debts, in accordance with 'CIPFA Code of Practice on Local Authority Accounting in United Kingdom – A Statement of Recommended Practice'.

Debts where a bad debt provision has been assigned should be appropriately reviewed on a timely basis with effective recovery methods applied. Where debts are not recoverable, suitable evidence should be provided to progress the case / debt to write off.

Any debts which form part of the proof of debt sent by the Council to the to the insolvency practitioner are written off if they meet all the terms of the insolvency agreement. The insolvency practitioner may make payments in the form of dividends to Bury Council which will be offset against the debt and the amount written off will be reduced accordingly.

A separate bad debt provision is held for each service area so that any increase required in the provision will be charged to the service area concerned. Conversely, if the debt for which a bad debt provision is paid then the provision for that debt will be credited back to the relevant service area.

# REPORT FOR NOTING

|                    |  |
|--------------------|--|
| <b>Agenda Item</b> |  |
|--------------------|--|

|                                                                                       |                                                                                                                                                                                                                                      |
|---------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>DECISION OF:</b>                                                                   | <b>PLANNING CONTROL COMMITTEE</b>                                                                                                                                                                                                    |
| <b>DATE:</b>                                                                          | <b>1<sup>ST</sup> SEPTEMBER 2026</b>                                                                                                                                                                                                 |
| <b>SUBJECT:</b>                                                                       | <b>NATIONAL SCHEME OF DELEGATION</b>                                                                                                                                                                                                 |
| <b>REPORT FROM:</b>                                                                   | <b>DEVELOPMENT MANAGER</b>                                                                                                                                                                                                           |
| <b>CONTACT OFFICER:</b>                                                               | <b>DAVID MARNO</b>                                                                                                                                                                                                                   |
| <b>TYPE OF DECISION:</b>                                                              | <b>COUNCIL</b>                                                                                                                                                                                                                       |
| <b>FREEDOM OF INFORMATION/STATUS:</b>                                                 | This paper is within the public domain                                                                                                                                                                                               |
| <b>SUMMARY:</b>                                                                       | Implementation of the National Scheme of Delegation for determination of Planning Applications                                                                                                                                       |
| <b>OPTIONS &amp; RECOMMENDED OPTION</b>                                               | To note                                                                                                                                                                                                                              |
| <b>IMPLICATIONS:</b>                                                                  |                                                                                                                                                                                                                                      |
| <b>Corporate Aims/Policy Framework:</b>                                               | Do the proposals accord with the Policy Framework? Yes                                                                                                                                                                               |
| <b>Statement by the S151 Officer: Financial Implications and Risk Considerations:</b> | Executive Director of Resources to advise regarding risk management<br><br>No direct financial implications to the Council arise from this Report as Planning Control Committee is not being requested to make a financial decision. |
| <b>Statement by Executive Director of Resources:</b>                                  |                                                                                                                                                                                                                                      |
| <b>Equality/Diversity implications:</b>                                               | No Direct Implications                                                                                                                                                                                                               |
| <b>Considered by Monitoring Officer:</b>                                              | Yes                                                                                                                                                                                                                                  |
| <b>Wards Affected:</b>                                                                | ALL                                                                                                                                                                                                                                  |
| <b>CLIMATE CHANGE IMPLICATIONS</b>                                                    | No Direct Implications                                                                                                                                                                                                               |

**TRACKING/PROCESS****DIRECTOR:**

| Chief Executive/<br>Strategic Leadership<br>Team | Executive<br>Member/Chair | Ward Members | Partners |
|--------------------------------------------------|---------------------------|--------------|----------|
|                                                  |                           |              |          |
| Scrutiny Committee                               | Committee                 | Council      |          |
|                                                  |                           |              |          |

**1.0 Background**

This report informs Planning Control Committee of significant national changes to the way planning applications must be determined by local planning authorities in England. These changes are due to the Local Planning Authority Functions Statutory Instrument July 2026 that is formally titled The Town and Country Planning (Discharge of Local Planning Authority Functions) (England) Regulations 2026. These Regulations were made on 15<sup>th</sup> July 2026 and come into force on 31<sup>st</sup> October 2026.

The Regulations are made under powers inserted into the Town and Country Planning Act 1990 by the Planning and Infrastructure Act 2025. They require relevant local planning authorities to make arrangements for specified planning functions to be discharged either by officers or by committee, depending on the category of application and the statutory tests set out in the Regulations. This is therefore a national legal requirement. It is not a local policy choice and it is not a matter on which Planning Control Committee is being asked to express a preference. The Council must ensure that its decision making arrangements comply with the Regulations from the date they come into force.

The Council has no discretion as to whether or not to implement the National Scheme of Delegation. From 31st October 2026 planning decisions must be made in accordance with the new Regulations. There is a risk that decisions taken on or after that date which do not align with the requirements of the Regulations could be considered unlawful by a Court.

**2.0 SUPPORTING INFORMATION**

The Regulations introduce a new National Scheme of Delegation for planning functions. Essentially, this means that the government has now set national rules about which planning applications must be decided by officers and which applications may (only in defined circumstances) go to Planning Control Committee.

The principal effect of the Regulations is that some applications which may currently be capable of being referred to Planning Control Committee will, in future, fall to be determined by officers. This includes, for example, householder applications, minor residential development, minor commercial development, non-

material amendments, applications to discharge conditions, prior approvals, certificate of lawful development and biodiversity gain plans.

There is also a national limit on the size of committees or sub-committees determining applications under the Regulations. An upper limit of 13 members is placed on such committees or sub-committees.

The Council is therefore required to review and update its Constitution, including the Planning Scheme of Delegation and associated Planning Control Committee Procedures to ensure compliance with the National Scheme of Delegation by 31<sup>st</sup> October 2026.

Planning Control Committee is not being asked to decide whether these national changes should be implemented as there is a requirement for the Council to implement them. The intention of this report is to explain the upcoming changes, set out their effects and inform Members that a further constitutional update will need to be progressed through the Council's governance arrangements with the formal decision to amend the Constitution being made by Full Council.

### **3.0 POLICY AND FINANCIAL IMPLICATIONS**

The stated aim of the national scheme of delegation is that, having identified variation between Councils, committees should focus on the proposals that genuinely matter to an area, and that the more minor and technical decisions should sit with officers.

The national scheme replaces those local schemes with a single set of rules for the whole of England. Section 54 of the Planning and Infrastructure Act 2025 inserted sections 319ZZC to 319ZZF into the Town and Country Planning Act 1990, giving the Secretary of State power to say which functions must be delegated to officers and which may go to a committee. That power has been exercised through the Town and Country Planning (Discharge of Local Planning Authority Functions) (England) Regulations 2026.

There will, however, be significant officer time spent on reviewing the Constitution, updating the Planning Scheme of Delegation, preparing associated procedures, briefing Members and updating public-facing guidance. Due to the timescales involved it is recommended that Officers should undertake work on this as soon as possible.

Following implementation, the National Scheme of Delegation is likely to reduce the number of applications that are reported to committee, but it will necessitate a robust triage, recording and transparency process to reduce the grounds of a potential legal challenge over such matters. Guidance issued by the government recognises that local planning authorities may wish to put in place a triage system so that the nominated officer and nominated member do not become inundated and to prevent unnecessary delays in the planning decision making process.

### **4.0 Key Messages for Planning Control Committee**

The key messages for Members are:

The National Scheme of Delegation is a national legal requirement, not a local policy choice;

- It comes into force on 31 October 2026;
- Some applications that may currently be capable of being referred to committee will, in future, have to be decided by officers;
- Schedule 1 applications must be delegated to officers;
- Schedule 2 applications are presumed to be delegated to officers unless the statutory gateway test is met and the nominated officer and nominated member agree to committee referral.
- Ward Member call-in arrangements and objection number triggers will not be able to override the National Scheme of Delegation.
- Planning Control Committee will remain important, but its role will be more focussed on significant applications that meet the statutory tests.
- The Council's Constitution and associated procedures will need to be reviewed and updated before 31 October 2026.
- The formal decision to amend the Constitution will need to be taken through the Council's constitutional governance arrangements, expected to include Full Council.
- Members, Parish Councils and residents will need clear communication and guidance so that they understand how to engage effectively under the new arrangements.

The Appendix to this Report is a report that has been prepared for consideration by Council and details the effects and implications of the Regulations.

#### **5.0 RECOMMENDED: That Planning Control Committee:**

- **Notes the introduction of the Town and Country Planning (Discharge of Local Planning Authority Functions) (England) Regulations 2026 which come into force on 31<sup>st</sup> October 2026; and**
- **Notes that the Regulations introduce a National Scheme of Delegation which all relevant local planning authorities in England must follow, by law; and**
- **Notes that the Council will need to update its Constitution, Planning Scheme of Delegation and associated Planning Control Committee procedures to ensure compliance with the Regulations; and**
- **Notes that the formal decision to amend the Constitution will need to be made via Full Council and that the matter is referred to Full Council for consideration at their meeting on 16<sup>th</sup> September 2026.**
- **Conclusion**

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#### **List of Background Papers:-**

[Consultation outcome - Reform of planning committees: technical consultation](#)  
[Planning Committees and the National Scheme of Delegation of Planning Functions:](#)  
[Draft guidance for local planning authorities in England](#)  
[Planning Committees and the National Scheme of Delegation of Planning Functions:](#)  
[Guidance for local planning authorities in England](#)

**Contact Details:-**

David Marno  
Head of Development Management  
Planning Services  
Place Directorate  
3 Knowsley Place  
Duke Street  
Bury  
BL9 0EJ  
**Tel:** 0161 253 5291  
**Email:** d.marno@bury.gov.uk

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| <b>Classification</b> | <b>Item No. 7</b> |
| <b>Open / Closed</b>  | <b>Appendix 1</b> |

## APPENDIX 1 – DRAFT COUNCIL REPORT

|                                        |                                                                  |
|----------------------------------------|------------------------------------------------------------------|
| <b>Meeting:</b>                        | Council/Planning Control Committee/Employment Panel/etc          |
| <b>Meeting date:</b>                   | 16 <sup>th</sup> September 2026                                  |
| <b>Title of report:</b>                | The National Scheme of Delegation – for Planning Decision Making |
| <b>Report by:</b>                      |                                                                  |
| <b>Decision Type:</b>                  | <b>Council</b>                                                   |
| <b>Ward(s) to which report relates</b> | <b>All</b>                                                       |

**Executive Summary:** This report sets out the introduction and required adoption of a National scheme of Delegation in relation to Planning Decisions made through the Town and Country Planning Acts.

The Government is reforming how Planning Committees operate through changes to the Planning and Infrastructure Act 2025. A national scheme of delegation is being introduced to ensure that planning committees can work as effectively as possible and focus on those applications for complex or contentious development where local democratic oversight is required.

The reforms comprise regulations and guidance governing:

- what matters will be determined by officers and which would be determined by Planning Committee, and
- the size of Planning Committees.

The government is committed to these reforms being introduced on 31st October 2026 and has asked Councils to amend their constitutions over the summer to allow these changes to come into effect on that date.

These changes require amendment of Bury Council's constitution.

This report therefore sets out how decisions for planning application and related decisions shall be made from 31<sup>st</sup> October 2026 and the processes that shall be adopted to accord with the new regulations.

To summarise the changes include:

- **Delegation to Officers:** Schedule 1 of the Regulations lists planning functions that **must always be delegated** to officers. These typically include minor applications, householder applications, and other routine consents
- **Referral to Committees:** Schedule 2 identifies functions that **may be referred to planning committees** under specific criteria, allowing committees to focus on major or contentious proposals
- **Committee Size:** The Regulations set a **maximum number of members of 13** - for planning committees to improve efficiency and decision-making quality .
- **Exclusions:** Certain authorities, such as National Park Authorities and development corporations, are not subject to these Regulations
- **Local Constitution Changes:** LPAs must amend their constitutions to align with the national scheme, removing previous powers for individual councillors to call in applications for committee consideration

### Implications for Local Planning Authorities

- **Consistency:** All LPAs in England will follow the same rules for delegating planning decisions, reducing variability and potential confusion
- **Efficiency:** Planning officers will handle routine and technical applications, freeing committees to focus on strategic or high-impact developments
- **Clarity of Roles:** The Regulations clarify which decisions are officer-led and which require committee oversight, enhancing transparency in planning governance

**Recommendation(s) That: amend Bury Council's constitution in relation to decision making on planning applications and related planning decisions**

**Key considerations**

**Background**

The Government is introducing a National Scheme of Delegation (NSD) via the Town and Country Planning (Discharge of Local Planning Authority Functions) (England) Regulations 2026.

Local Planning Authorities (LPAs) are expected to have the new arrangements in place for 31 October 2026. Decisions taken on or after that date must be taken in line with the Regulations and if not, could be considered by the Courts to have been unlawfully taken. LPAs need to commence the work of changing their constitutions as soon as possible.

**The proposal**

**1 Planning Scheme of Delegation**

The Scheme is in two parts: the elements that need to be within a Council's Constitution and those that should be outside it. Those elements that are outside the Constitution are administrative in nature rather than constitutional and are generally called a Scheme of Management.

Reference to Regulations in this document is a reference to the Town and Country Planning (Discharge of Local Planning Authority Functions) (England) Regulations 2026.

**2 Delegation Of Planning Functions**

- 2.1** All planning matters and functions that the Council as Local Planning Authority are responsible for are delegated to the Chief Planning Officer <sup>1</sup> except where the decision on a matter or function is reserved to the following bodies:

**Full Council**

- 2.2** The following must be determined by Full Council:

- To submit a Development Plan Document for examination
- To adopt a Development Plan Document

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<sup>1</sup> In the case of Bury Council this is the Assistant Director for Strategy, Planning and Transport

- To submit a draft Charging Schedule for examination
- To approve or withdraw a Charging Schedule

## **Executive**

2.3 The following must be determined by the Executive:

- To consult on a Local Development Framework Document
- To adopt a Supplementary Plans, the Local Development Scheme or the Statement of Community Involvement
- To approve the Authority Monitoring Report
- To authorise a Neighbourhood Plan to be put to referendum
- To agree that a Neighbourhood Plan be Made
- To designate a Conservation Area

## **Planning Committee**

2.4 The following planning applications must be determined by Planning Control Committee:

- Those applications listed in Schedule 2 that the Nominated Member and the Nominated Officer agree that referral to and determination by Planning Control Committee is necessary.
- An Own-Interest Application, as defined in the Regulations, that the Nominated Member and the Nominated Officer agree that referral to and determination by Planning Control Committee is necessary.
- Any other planning matter that an officer of the authority with delegated powers considers that referral to and determination by Planning Control Committee is necessary

## **Triage System**

2.5 As recommended in the MHCLG Guidance that accompanied the Regulations, where local planning authorities anticipate that there may be a significant number of cases which meet the criteria in regulation 5(3) (Gateway Test) or which may fall under regulation 6 (Own-Interest Application) and which could therefore be considered for referral to committee, they may wish to put in place a triage system to ensure that the nominated officer and nominated member of the committee are not overwhelmed and to avoid any unnecessary delays in planning decision making.

2.6 The Council's Triage System has two stages:

- Stage 1: a category or part of a category of an application of a kind specified by Schedule 2 which should be treated as such.
- Stage 2: a specific application of a kind specified by Schedule 2 where an officer with delegated powers considers it should be treated as such because the criteria in Regulation 5(3) are clearly not engaged.

2.7 Those application types that fall into stage 1 are listed in the Schedule 2 appendix.

### **Delegation And Sub-Delegation**

2.8 The Chief Planning Officer should produce a document (called the Planning Scheme of Management) for the purposes of Regulation 3 that clearly sets out:

- A. the member of the authority who acts as the Nominated Member;
- B. one or more members of the authority who act as a substitute for the Nominated Member;
- C. the officer of the authority who acts as the Nominated Officer; and
- D. one or more officers of the authority who act as a substitute for the Nominated Officer.

2.9 With respect to A and B different members can be nominated for different purposes. With respect to C and D different officers can be nominated for different purposes. These should also be set out in the document.

2.10 The document should also set out:

- the officer(s) of the authority who have delegated powers to determine a Schedule 1 planning application (Regulation 4);
- the officer(s) of the authority who have delegated powers to determine a Schedule 2 planning application (Regulation 5);
- the officer(s) of the authority who have delegated powers to determine an Own-Interest Application (Regulation 6); and
- the officer(s) of the authority who have delegated powers under the Constitution to determine any other planning matter.

2.11 The document should be published on the Council's website.

### **Lobbying**

2.12 The Nominated Member or the Nominated Officer or any other officer of the authority, when exercising their powers under Regulations 4, 5 or 6 and this Scheme of Delegation, shall not be lobbied or otherwise contacted by any person or organisation, including by members or officers of the relevant authority, to use their power in a particular way.

2.13 Any such lobbying that is received should be reported to the Monitoring Officer, who will deal with it as appropriate. The Monitoring Officer shall develop and publish procedures to deal with these issues and other vexatious planning complaints.

## **3 Planning Control Committee - Terms Of Reference**

## **Membership**

- 3.1 By virtue of Regulation 7, it cannot exceed 13 elected members (to be politically balanced).

## **Purpose**

- 3.2 To exercise, in line with the Council's Planning Control Committee Procedures, the functions, powers and duties of the Council in relation to the determination of planning applications and any other planning matter referred to it by the Chief Planning Officer.

## **Powers**

- 3.3 The Planning Control Committee has the following powers:
- a. To hear pre-application or pre-determination presentations of developments by developers and for individual members of the Committee to ask questions and highlight issues that may require further consideration by the developer.
  - b. To determine the planning applications referred to it pursuant to the Regulations and the Constitution, as set out above.
  - c. To consider, and where necessary determine, any other planning matter referred to it by the Chief Planning Officer.

## **APPENDIX – Schedule 1**

1. An application made under section 17(1) of the Land Compensation Act 1961 (certificates of appropriate alternative development) (a).
  2. An application made under section 26H(1) of the Listed Buildings Act (certificate of lawfulness of proposed works) (b)
  3. A householder application.
  4. A minor commercial application.
  5. A minor residential application.
  6. An application for permission in principle (c).
  - 7.—(1) An application made under section 73(1) of TCPA 1990 (application to develop land without compliance with conditions previously attached) in respect of which the original planning permission was a Schedule 1 planning permission.
- (2) In this paragraph—

“original planning permission” means a planning permission which is the first in a sequence of two or more planning permissions, where the second and any subsequent planning permissions were granted under section 73(1) of TCPA 1990;

“Schedule 1 planning permission” means a planning permission granted pursuant to an application which is of a kind specified in this Schedule.

8. An application made under section 96A(4) of TCPA 1990 (non-material changes to planning permission or permission in principle) (d).

9.—(1) In respect of a planning obligation that the authority concerned considers is connected with a Schedule 1 approval—

(a) a request to agree to modify or discharge that obligation under section 106A(1)(a) of TCPA 1990 (modification and discharge of planning obligations) (e);

(b) an application to modify or discharge that obligation under section 106A(3) of TCPA 1990 (modification and discharge of planning obligations) (f).

(2) In this paragraph, ‘Schedule 1 approval’ means any permission, agreement, consent or approval (other than a planning obligation) pursuant to an application which is of a kind specified in this Schedule.

10. An application made under section 191(1) of TCPA 1990 (certificate of lawfulness of existing use or development) (g).

11. An application made under section 192(1) of TCPA 1990 (certificate of lawfulness of proposed use or development) (h).

12. The submission of a biodiversity gain plan under paragraph 13(2)(a) of Schedule 7A to TCPA 1990 (i).

13. A reserved matters approval application in respect of an outline planning permission other than a large outline permission.

14. An application made under article 27(1) of DMPO (applications made under a planning condition).

15. An application pursuant to provision in Schedule 2 to the Town and Country Planning (General Permitted Development) (England) Order 2015 (j) for—

(a) prior approval, or

(b) determination as to whether prior approval is required

## **APPENDIX – Schedule 2**

As provided for by the Regulations, this Schedule contains those application types that should be determined by officers, pursuant to Regulation 5, unless the nominated member and officer agree to refer it to committee.

## **Triaged Applications**

The following categories of application should be determined by officers:

- [These are those Schedule 2 Applications that are moved here so that they are always considered to be delegated – this should be those application types that are already delegated under a Council’s current constitution]
- Advertisements
- Tree works applications
- Variation of conditions

A Triaged Application can also be identified, from the list of Residual Schedule 2 applications below, by an officer with delegated powers in the context of a particular application.

## **Residual Schedule 2 Applications**

The Gateway-Test must be applied to a Schedule 2 application, which is not a Triaged Application, to decide whether it needs to be reported to Planning Control Committee, these include:

1. An application for listed building consent made under section 10(1) of the Listed Buildings Act (making of applications for listed building consent).
2. An application made under section 19(1) of the Listed Buildings Act (variation or discharge of conditions of listed building consent).
3. An application for planning permission that the authority concerned considers is connected with an application of a kind specified in paragraph 1 or 2.
4. An application for planning permission that is not—
  - (a) a householder application,
  - (b) a minor commercial application, or
  - (c) a minor residential application.
- 5.—(1) An application made under section 73(1) of TCPA 1990 (application to develop land without compliance with conditions previously attached) in respect of which the original planning permission was a Schedule 2 planning permission.
  - (2) In this paragraph—

“original planning permission” means a planning permission which is the first in a sequence of two or more planning permissions, where the second and any subsequent planning permissions were granted under section 73(1) of TCPA 1990;

“Schedule 2 planning permission” means a planning permission granted pursuant to an application which is of a kind specified in this Schedule.

6. An application made under section 73A(1) of TCPA 1990 (planning permission for development already carried out) (a).

7.—(1) In respect of a planning obligation that the authority concerned considers is connected with a Schedule 2 approval—

(a) a request to agree to modify or discharge that obligation under section 106A(1)(a) of TCPA 1990 (modification and discharge of planning obligations);

(b) an application to modify or discharge that obligation under section 106A(3) of TCPA 1990 (modification and discharge of planning obligations).

(2) In this paragraph, ‘Schedule 2 approval’ means any permission, agreement, consent or approval (other than a planning obligation) pursuant to an application which is of a kind specified in this Schedule.

8. A reserved matters approval application in respect of a large outline permission.

9. An application made under regulation 9(1) of the Town and Country Planning (Control of Advertisements) (England) Regulations 2007 (application for express consent to display advertisement) (b).

10. An application made under regulation 16(1) of the Town and Country Planning (Tree Preservation) (England) Regulations 2012 (application for consent under tree preservation order) (c).

## **ADMINISTRATIVE ELEMENTS**

### **Planning Scheme Of Management**

#### **1 Introduction**

1.1 Reference to Regulations in this document is a reference to the Town and Country Planning (Discharge of Local Planning Authority Functions) (England) Regulations 2026.

1.2 This Planning Scheme of Management allows the Chief Planning Officer to discharge their responsibilities under the Planning Scheme of Delegation in the Constitution, and for the purposes of Regulation 3 to produce a document that clearly sets out:

A. the member of the authority who acts as the Nominated Member;

B. one or more members of the authority who act as a substitute for the Nominated Member;

C. the officer of the authority who acts as the Nominated Officer;

D. one or more officers of the authority who act as a substitute for the Nominated Officer.

1.3 The document must also set out:

- the officer(s) of the authority who have delegated powers to determine a Schedule 1 planning application (Regulation 4);
- the officer(s) of the authority who have delegated powers to determine a Schedule 2 planning application (Regulation 5);
- the officer(s) of the authority who have delegated powers to determine a Own-Interest Application (Regulation 6); and
- the officer(s) of the authority who have delegated powers under the Constitution to determine any other planning matter.

1.4 This document sets out the rules within the Regulations and provides additional advice on the use of delegated powers; both those powers derived from the Regulations and the powers delegated to the Chief Planning Officer in the Council's Constitution.

## **2 Nominated Members**

2.1 Pursuant to Regulation 3(1)(a) and 3(2)(a):

- The Nominated Member for the purposes of Regulations 5 and 6 is the Chair of Planning Control Committee.

### **Substitutes**

2.2 Pursuant to Regulation 3(2)(b), where the Nominated Member is unavailable for whatever reason, the substitute Nominated Member is the Vice Chair of Planning Committee<sup>2</sup>.

## **3 Nominated Officers**

3.1 Pursuant to Regulation 3(1)(b) and 3(2)(a):

- The Nominated Officer for the purposes of Regulations 5 and 6 is the Chief Planning Officer.

### **Substitutes**

3.2 Pursuant to Regulation 3(2)(b), where the Nominated Officer is unavailable for whatever reason, the substitute Nominated Officer is the Head of Development

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<sup>2</sup> To be designated

Management or Team Leader Development Management or in the absence of the Head of Service and Team Leader.

#### 4 Sub-Delegation

- 4.1 The Regulations and the Constitution provide that different officers can be nominated for different purposes with respect to the determination of planning applications and other planning matters.

#### Schedule 1 And Schedule 2 Triaged Applications

- 4.2 The Chief Planning Officer has sub-delegated the task of determining the following planning application categories to the following officers of the LPA.

#### Schedule 1 Applications (Regulation 4)

- 4.3 Applications that must be determined by officers.

| Application category        | Service Head                   | Section Head                       | Other Named Posts                   |
|-----------------------------|--------------------------------|------------------------------------|-------------------------------------|
| <i>All Schedule 1</i>       | State job title(s)             | State job title(s)                 | State job title(s)                  |
| <i>Items 1-15 inclusive</i> | Head of Development Management | Team Leader Development Management | Designated Senior Planning Officers |
| ...etc                      |                                |                                    |                                     |

#### Schedule 2 Triaged Applications (Regulation 5)

- 4.4 Triaged Applications identified in the Scheme of Delegation.

| Application category        | Service Head                   | Section Head                       | Other Named Posts                   |
|-----------------------------|--------------------------------|------------------------------------|-------------------------------------|
| <i>All Schedule 2 items</i> | State job title(s)             | State job title(s)                 | State job title(s)                  |
|                             | Head of Development Management | Team Leader Development Management | Designated Senior Planning Officers |
| ...etc                      |                                |                                    |                                     |

**Schedule 2 Residual Applications (Regulation 5)**

4.5 Triaged Applications capable of being identified and determined by officers.

| Application category                                   | Service Head                                         | Section Head                                             | Other Named Posts                                         |
|--------------------------------------------------------|------------------------------------------------------|----------------------------------------------------------|-----------------------------------------------------------|
| <i>State the category from the respective schedule</i> | State job title(s)<br>Head of Development Management | State job title(s)<br>Team Leader Development Management | State job title(s)<br>Designated Senior Planning Officers |
|                                                        |                                                      |                                                          |                                                           |

**Residual Schedule 2 And Own-Interest Application**

4.6 The role of Nominated Member and Nominated Officer is to decide whether a non-triaged Schedule 2 application or a Own-Interest Application is determined by committee. Where it is not to be determined by committee, the Chief Planning Officer has sub-delegated the task of determining the following planning application categories to the following officers of the LPA.

**Schedule 2 Non-Gateway-Test Applications (Regulation 5)**

| Application category                                                             | Service Head                                         | Section Head                                             | Other Named Posts                                         |
|----------------------------------------------------------------------------------|------------------------------------------------------|----------------------------------------------------------|-----------------------------------------------------------|
| <i>State the category from the respective schedule</i><br><i>Items 1-10 inc.</i> | State job title(s)<br>Head of Development Management | State job title(s)<br>Team Leader Development Management | State job title(s)<br>Designated Senior Planning Officers |
|                                                                                  |                                                      |                                                          |                                                           |

**Own-Interest Applications (Regulation 6)**

| Application category | Service Head | Section Head | Other Named Posts |
|----------------------|--------------|--------------|-------------------|
|                      |              |              |                   |

|                                                        |                                                      |                                                          |                                                           |
|--------------------------------------------------------|------------------------------------------------------|----------------------------------------------------------|-----------------------------------------------------------|
| <i>State the category from the respective schedule</i> | State job title(s)<br>Head of Development Management | State job title(s)<br>Team Leader Development Management | State job title(s)<br>Designated Senior Planning Officers |
|--------------------------------------------------------|------------------------------------------------------|----------------------------------------------------------|-----------------------------------------------------------|

### Other Planning Matters

- 4.7 The Constitution delegates all planning matters to the Chief Planning Officer, save for those matters that must be determined by Full Council, the Executive or Planning Control Committee. The Chief Planning Officer has sub-delegated the task of determining the following planning matters to the following officers of the LPA.

| Planning Matter                  | Service Head                                         | Section Head                                             | Other Named Posts                                         |
|----------------------------------|------------------------------------------------------|----------------------------------------------------------|-----------------------------------------------------------|
| <i>State the planning matter</i> | State job title(s)<br>Head of Development Management | State job title(s)<br>Team Leader Development Management | State job title(s)<br>Designated Senior Planning Officers |
|                                  |                                                      |                                                          |                                                           |

- 4.8 With respect to a planning matter that is delegated to the Chief Planning Officer but is not listed above, the Chief Planning Officer can, at their discretion, sub-delegate the task of determining the matter to another officer.

## 5 Use Of Delegated Powers

- 5.1 When using delegated powers or referring a matter to committee for a determination, the Nominated Officer and the Nominated Member, when involved, and an officer of the LPA must make sure that they take such decisions in the appropriate way and that they are recorded. This should be captured in the associated delegated or committee report with respective sections titled:

- Reason for determining under delegated powers
- Reason for referral to Committee

- 5.2 These reasons should be succinct but clear.

### Schedule 1

- 5.3 These applications must always be determined under delegated powers and cannot be referred to committee for determination. The associated delegated report should therefore state:

This is a Schedule 1 Application. By virtue of Regulation 4, it must be dealt with under delegated powers.

## **Schedule 2**

### **Triaged Applications**

- 5.4 Some categories of application in Schedule 2 have been identified in the Scheme of Delegation as Triage Applications and should be determined under delegated powers. The other categories of application in Schedule 2 can be treated as a Triaged Application by officers if they consider that, in the context of a particular application, the criteria in the Gateway Test (see below) are clearly not engaged. In both cases, the associated delegated report should state:

This is a Schedule 2 Application. By virtue of Regulation 5, it should be dealt with under delegated powers because the Gateway Test is not engaged.

### **Gateway Test Applications**

- 5.5 The Regulations make provision, in Regulation 5(3), for the matters that must be considered by the Nominated Member and Nominated Officer when they agree whether or not to refer a proposal to determine a Schedule 2 Application to committee. They are known as the Gateway Test and are that the proposal raises:

- a) one or more issues of economic, social or environmental significance to the local area; or
- b) one or more significant planning matters having regard to the development plan and any other material considerations.

- 5.6 If it is agreed to refer an application to committee, that decision and the reasons for it should be set out succinctly and clearly in the associated committee report as follows:

*This is a Schedule 2 Application. By virtue of Regulation 5, it is being reported to Committee because the Nominated Member and Nominated*

*Officers agree that it is necessary because [it raises one or more issues of economic, social or environmental significance to the local area] [and] [it raises one or more significant planning matters having regard to the development plan and any other material considerations].*

- 5.7 If it remains a delegated decision, the associated delegated report should state:

*This is a Schedule 2 application. By virtue of Regulation 5, it is being dealt with under delegated powers because the Nominated Member and Nominated Officer do not agree that the Gateway Test is engaged because it does not raise any issues of economic, social or environmental significance to the local area and nor does it raise any significant planning matters having regard to the development plan and any other material considerations.*

### **Triage Process For Own-Interest Applications**

5.8 These are applications made by or on behalf of:

- a) the Council;
- b) a member of the Council;
- c) an officer of the Council; or
- d) the Council or any of its members or officers otherwise has an interest in the application.

5.9 The decision-making process for these applications should be one of ensuring openness and transparency. In deciding whether to refer to committee, the Nominated Member and Officer should ensure that, because of the nature of the applicant, there is not a real (or reasonably perceived) risk of bias by determining the application under delegated powers and secondly that, because of the nature of the development, there is a good reason to refer it to Committee.

### **Own-Interest Applications: Applicant Considerations**

5.10 In this context, category (c) Linked Persons should normally be narrowed to only apply to:

- a Senior Officer of the Council; or
- an 'officer of the Local Planning Authority'.

5.11 The first would be defined as Service Head level and above.

5.12 The second, would be defined as an officer within the Council who, in the opinion of the Chief Planning Officer, is closely involved in the day-to-day work of the Council's planning function.

5.13 It is reasonable to conclude that other officers of the Council would probably not be known to the planning service and therefore the risk of bias is not engaged. Such applications should be determined in the same way that any other application in that Schedule would be determined. The details of the Own-Interest applicant status should be recorded in the respective committee or delegated report with the following introduction:

*This is an Own-Interest Application because the applicant is an officer of the Council, but as they are not a senior officer nor closely involved in the day-to-day work of the Council's planning function it has not been reported to committee for that reason. [This is a Schedule 1 Application.*

*By virtue of Regulation 4, it must be dealt with under delegated powers.] [This is a Schedule 2 Application. By virtue of Regulation 5, it should be dealt with under delegated powers because the Gateway Test is not engaged.]*

### **Own-Interest Applications: Development Considerations**

#### **5.14 For any application:**

- caught by the above category (c) 'Own-Interest applicant status' criteria; or
- an Own-Interest Application in categories (a), (b) and (d);

with respect to whether there is a good reason to refer that application to committee because of the nature of the development, the following criteria should be used:

Such an Own-Interest Application should only be considered by the Nominated Member and Nominated Officer for referral to and determination by committee if one of the following criteria applies:

- the proposal has been advertised under Article 15 of the DMPO because it does not accord with the provisions of the development plan; or
- one or more material planning considerations are raised that have the potential to have a significant impact.

#### **5.15 This allows the circumstances of each application to be assessed and if it is for a development that complies with policy and there is not considered to be a material planning objection, it can be dealt with under delegated powers, with the reason recorded in the delegated report as follows:**

*This is an Own-Interest Application. By virtue of Regulation 5, it is not being reported to committee because it has not been advertised under Article 15 of the GMPO as a departure and nor is there considered to be a material planning objection.*

#### **5.16 Where either of these criteria applies, the Nominated Member and Nominated Officer must agree that it is necessary for the planning application to be referred to and determined by committee and this should be recorded in the normal way in the associated committee report as follows:**

*This is an Own-Interest Application. By virtue of Regulation 5, it is being reported to Committee because the Nominated Member and Nominated Officer agree that it is necessary because [it has been advertised under Article 15 of the GMPO as a departure] [and] [there is considered to be a material planning objection].*

- 5.17 Limitations should be set on the receipt of material planning considerations by the Planning Service to ensure that these matters can be safely administered, and the risk of fraudulent objections is minimised:

A material planning consideration must have been made in writing in response to the publicity/advertisement/notification of the application, be from a person with an address within the LPA area and be received within the specified deadline.

- 5.18 With these safeguards in place, such applications will be put to committee where that serves a legitimate purpose but can be dealt with under delegated powers where committee involvement is not necessary.
- 5.19 Under Regulation 10 of the Town and Country Planning General Regulations 1992, where a local planning authority is determining its own application for planning permission, it must not be determined by a committee, sub-committee or officer responsible for the management of the building or land to which the application relates. In addition to this restriction, where a planning application is made by or on behalf of a nominated officer or member or an entity owned or controlled (whether wholly or partly) by a member or officer (including jointly with another person), in the interests of propriety, they should not be involved in the decision on whether to refer it to committee or not.

#### **Officer's Discretion To Use Delegated Powers**

- 5.20 With respect to planning applications covered by the Regulations, officers do not have discretion to decide to report a matter to committee. Only the nominated member and officer can jointly take that decision.
- 5.21 With respect to any other planning matter that is capable of being dealt with under delegated powers, an officer does have the ability, in their absolute discretion, to decide that it is not appropriate in the circumstances of a particular case to exercise those powers with respect to that planning matter and therefore report it to members (Full Council, the Executive or [Planning Control Committee] as appropriate) for determination. Again, it is not possible to advise further on this because these are essentially exceptional circumstances.
- 5.22 In both cases, that decision and the reasons for it should be set out succinctly and clearly in the associated committee report, as follows:

*This is [describe the planning matter]. It is being reported to [Council] [Cabinet] [Committee] because the Chief Planning Officer considers that it is necessary because [...].*

#### **Lobbying**

- 5.23 The Council's Scheme of Delegation prohibits the Nominated Member or the Nominated Officer or any other officer of the authority, when exercising their powers under Regulations 4, 5 or 6 and the Scheme of Delegation, being lobbied

or otherwise contacted by any person or organisation, including by members or officers of the relevant authority, to use their power in a particular way.

- 5.24 The Constitution requires that any such lobbying that is received should be reported to the Monitoring Officer, who must develop and publish procedures to deal with these issues and other vexatious planning complaints.

### Other alternative options considered

The above reflects the statute requirements and therefore there are no other options to present.

The triaged applications, gateway tests engage discretion based upon the nature of the schemes involved. These cannot be predicted but as the legislation and report sets out, there are checks and balances in place to ensure that appropriate matters receive appropriate consideration, with the outcomes properly recorded.

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## Community impact/links with Community Strategy

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### Equality Impact and considerations:

*Under section 149 of the Equality Act 2010, the 'general duty' on public authorities is set out as follows:*

*A public authority must, in the exercise of its functions, have due regard to the need to -*

- (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;*
- (b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;*
- (c) foster good relations between persons who share a relevant protected characteristic and persons who do not share it.*

*The public sector equality duty (specific duty) requires us to consider how we can positively contribute to the advancement of equality and good relations, and demonstrate that we are paying 'due regard' in our decision making in the design of policies and in the delivery of services.*

|                          |                                                                                                           |
|--------------------------|-----------------------------------------------------------------------------------------------------------|
| <b>Equality Analysis</b> | <i>Please provide a written explanation of the outcome(s) of either conducting an initial or full EA.</i> |
|--------------------------|-----------------------------------------------------------------------------------------------------------|

There is a statutory requirement to consult on both draft regulations and guidance under section 319ZZE(6) of the Town and Country Planning Act 1990. This statutory consultation seeks views on the technical detail and drafting of the regulations and guidance which reflect these principles and supports LPAs in delivering planning decisions that are transparent, accountable and community focused. This consultation was undertaken by the Government on 26 March 2026. The Impact Assessment can be found [here](#).

Locally, the default position is that planning applications should be determined by officers, with referral to committee only in exceptional circumstances. For a referral to be considered, at least one of the following criteria should normally apply:

- The application raises a **significant planning matter** in relation to the development plan or other material considerations; or
- The application raises a **significant economic, social, or environmental issue** for the local area.

Applications are unlikely to raise a significant planning matter where they broadly comply with an allocated site and relevant planning policies, or where concerns raised by statutory consultees have been resolved through amendments that satisfy those consultees.

Where no significant planning matter exists, referral under the second criterion should be limited to cases involving issues of notable local importance, such as major residential developments, the loss of key community facilities, or changes to significant listed buildings.

Applications submitted by the authority itself, its members, officers, or entities they control may be referred to committee in the interests of transparency and accountability, even where the above criteria are not met. If not referred, they should be determined by an officer.

To avoid conflicts of interest, members, officers, and those connected to an application should not be involved in deciding whether it is referred to committee.

The above gateway test and triage system would ensure that there is appropriate consideration to equality implications in the determination of matters will be decided.

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### Assessment of Risk:

The following risks apply to the decision:

| Risk / opportunity | Mitigation |
|--------------------|------------|
| Not applicable     | .          |

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**Consultation:**

Item referred to Bury Council's Planning Control Committee for noting date 1st September 2026

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**Legal Implications:**

The Council is required to adopt the National Scheme of Delegation from 31<sup>st</sup> October 2026 and determine planning applications in accordance with that scheme of delegation from that date. Failure to determine applications in accordance with the National Scheme of Delegation would potentially render such decisions unlawful and liable to legal challenge which the Council would be extremely difficult for the Council to resist and with adverse financial and reputational consequences

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**Financial Implications:**

None

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**Report Author and Contact Details:**

David Marno

Head of Development Management

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**Background papers:**

[Consultation outcome - Reform of planning committees: technical consultation](#)

[Planning Committees and the National Scheme of Delegation of Planning Functions: Draft guidance for local planning authorities in England](#)

[Planning Committees and the National Scheme of Delegation of Planning Functions: Guidance for local planning authorities in England](#)

[The Town and Country Planning \(Discharge of Local Planning Authority Functions\) \(England\) Regulations 2026](#)

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

| Term | Meaning |
|------|---------|
|      |         |

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**GENERAL REPORT OF THE MEETING HELD ON 8 JULY 2026****URGENT BUSINESS – BURY ART MUSEUM ROOF**

1. The Cabinet Member for Culture, Economy and Skills presented a report which sought approval to appoint a contractor for work to the Bury Art Museum roof. This had been deferred from the previous meeting in order to clarify a point regarding the named contractor. Councillor McGill confirmed the crux of the matter was a mistake over two similar trading names, and gave assurances around the enhanced due diligence that had been undertaken. In response to Members' questions, it was noted that Constellia, the external procurement agency, had issued a letter of apology and the Council retained confidence in using their services for future projects.
2. Cabinet approved the recommendations as set out in the report.

**CORPORATE PLAN QUARTER FOUR 2025-26 PERFORMANCE & DELIVERY**

3. The Deputy Leader and Cabinet Member for Finance and Corporate Services presented a report providing an overview of progress for strategic priorities and delivery objectives during Quarter Four (January to March 2026) and the overall position at year end. Councillor Thorpe advised that the position was positive on the whole, with the majority of objectives delivered or on track, and mitigations in place for amber risks. He advised of one red rated risk, relating to the impact of an external provider delaying the flood defences at Hardy's Gate bridge and, in response to Members' questions, it was noted that there were other flood defences in the area and the external company was still committed to carry out the works.
4. In response to further questions, it was noted that the PRU site at Milton Road was on track for an opening date in September 2028, and the Holiday Activities and Food (HAF) programme in place from September 2026 was welcomed, but support to help families before reaching crisis point continued. With regards to a rise in staff sickness, it was noted that this was a national trend across the public sector from increased pressure on staff, and Bury continued to develop programmes of support for staff mental health and wellbeing. With regards to Bury Market, it was noted that the problems were very complex to find solutions for and of a highly technical nature. Officers confirmed that the Markets Team communicated regularly with market traders, but more collaborative communication work was now needed.
5. Finally, Councillor Thorpe advised that the reduction in agency staff had been successful and was continuing, with a strong employment offer being an inducement to work in Bury; an overview of the Unit 4 software could be provided outside of the meeting; KPIs were reviewed to ensure they remained appropriate; and a breakdown of households in temporary accommodation could be provided outside of the meeting.
6. Cabinet approved the recommendations as set out in the report.

**FINANCE UPDATE REPORT - 2025/26 OUTTURN POSITION**

7. The Deputy Leader and Cabinet Member for Finance and Corporate Services presented a report regarding the Council's final outturn position across the General Fund revenue and Capital budgets, Housing Revenue Account (HRA) and Dedicated Schools Grant (DSG ). Councillor Thorpe reported that the General Fund outturn position was an overspend of £7.266m, which represented a favourable movement of £0.673m from the Quarter 3 forecast overspend. 68.19% of savings targets had been delivered, with the rest programmed in for next year. The Capital Programme had also seen slippage and would be reviewed and reprofiled with regards to delivery. It was noted that a drawdown of £7.266m from the budget stabilisation reserve has been required, and the reserve was no longer sufficient to support the forecast funding gap beyond 2027/28, though work continued on the budget review to identify savings and income generation.
8. In response to Members' questions, it was noted that:
  - The next 12 months would be a critical time, and nothing was "off the table" in terms of financial savings..
  - Savings plans put in place months or even years ago were starting to take effect (e.g. in Childrens Services). These had taken a long time to embed but were now showing financial benefits.
  - The biggest contributor to the non-service specific overspend was the delayed housing integration which was being closely monitored.
  - Internal governance structures were much stronger, giving better oversight and tracking of savings delivery, an identifying slippage or delays much sooner.
  - Care in the Community costs were split with NHS, and work was underway with NHS partners to review arrangements.
  - Underspend in personal budgets were followed up to ensure residents were happy, but spend was their personal choice.
9. Cabinet approved the recommendations as set out in the report.

#### **ADULT SOCIAL CARE PERFORMANCE REPORT FOR QUARTER FOUR, 2025/26**

10. The Cabinet Member for Adult Care, Health and Public Service Reform presented a report regarding the Quarter 4 reporting for Adult Social Care, including delivery of the Adult Social Care Strategic Plan, preparation for the Care Quality Commission (CQC) Assessment, and the department's performance framework. Thanks were extended to staff in Killelea House, which had achieved an Outstanding rating in the recent CQC inspection.
11. In response to Members' questions, it was noted that the Care Act assessment waiting list had been reduced from 83 to 68 and work was in place to reduce this further. Waiting lists were reviewed regularly and governed by the Waiting Well protocol, with individual care needs triaged at each stage of the journey. With regards to complaints, these were varied in subject and significance, but still represented a low number compared to number of residents served.
12. Cabinet approved the recommendations as set out in the report.

#### **OUTCOME OF CQC LOCAL AUTHORITY ASSESSMENT OF ADULT SOCIAL CARE**

12. The Cabinet Member for Adult Care, Health and Public Service Reform presented a report regarding the results of first CQC assessment of Bury Local Authority and summarised the key strengths and areas where improvement was required. Councillor Tariq advised that the overall assessment found that Bury delivers Good standard of adult social care, with strengths in leadership, effective safeguarding, partnership working and a clear strategic vision. Members expressed their thanks to all staff and partners for their work and contribution, and officers thanked cross-party Councillors for their part in the inspection and outcome.
13. Cabinet approved the recommendations as set out in the report.

#### **ADVOCACY CONTRACT EXTENSION & TENDER**

14. The Cabinet Member for Adult Care, Health and Public Service Reform presented a report providing a position update to Bury's independent advocacy services and sought approval for a 3-month extension to the current contract and permission to retender. In response to Members' questions, it was noted that the extension had an above inflation increase, reflecting wage inflation, but still offered value for money as the provider was tested and reliable. With regards to the financial commitment from the ICB, this was a statutory duty so was assured.
15. Cabinet approved the recommendations as set out in the report.

#### **BURY'S LOCAL AREA SEND MONITORING INSPECTION**

16. The Deputy Leader and Interim Cabinet Member for Children and Young People presented a report regarding the outcome of the monitoring inspection undertaken in March 2026 by Ofsted and the Care Quality Commission (CQC), which had concluded that effective action has been taken in all six priority action areas. Members congratulated all involved in getting Bury to this point. In response to Members' questions, it was noted that neurodiverse diagnoses sat at a GM level and could be discussed in full at the Health Scrutiny meeting next week.
17. Cabinet approved the recommendations as set out in the report.

#### **ALTERNATIVE PROVISION**

18. The Deputy Leader and Interim Cabinet Member for Children and Young People presented a report regarding the short-term extension and recommissioning of Bury's Alternative Provision for children and young people. In response to Members' questions, it was noted that the cost of extending the contract did not exceed a pro-rata measurement of the overall contract cost, but did allow additional time and flexibility to plan moving forwards.
19. Cabinet approved the recommendations as set out in the report.

#### **PRESTWICH VILLAGE REGENERATION PROJECT: DELIVERY OF PHASE 1A (TRAVEL HUB) - ADDITIONAL FUNDING REQUEST**

20. The Cabinet Member for Regeneration and Growth presented a report regarding the approval for £153,009.00 additional capital funding for extra works to fully deliver the first phase of the Prestwich Village Regeneration project. Councillor Morris

advised that the requirement for additional funding was identified as a late requirement through the statutory planning consultation. In response to Members' questions, it was noted that this included ICT equipment costs which needed to wait until the end of the construction contract in order to be in-line with the car park operator. It was noted there were no risks of other costs rising anticipated.

21. Cabinet approved the recommendations as set out in the report.

#### **PYRAMID PARK - REMEDIATION MAIN WORKS CONTRACT**

22. The Cabinet Member for Regeneration and Growth presented a report regarding proposed works packages included within the JCT Design and Build Contract (2016) encompassing the delivery of a full land remediation strategy and associated preparatory enabling works at Pyramid Park, a 7.4-acre disused brownfield site identified for a high-quality, sustainable residential development.

23. Cabinet approved the recommendations as set out in the report.

#### **ECONOMIC DEVELOPMENT & REGENERATION GRANT FUNDING**

24. The Cabinet Member for Culture, Economy and Skills presented a report regarding the extension of the Local Growth and Place Flexible Grant (LGPFG) programme 2025/26 and the new year of funding, now called Economic Development & Regeneration Grant Funding 2026/27. Members welcomed the paper and the contributions to cultural projects.

25. Cabinet approved the recommendations as set out in the report.

|                                      |                                                                                                                                                   |
|--------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Meeting:                             | The Council                                                                                                                                       |
| Meeting date:                        | 16 <sup>th</sup> September 2026                                                                                                                   |
| Title of report:                     | Update on Greater Manchester Joint Authorities Activity<br><br> |
| Report by:                           | Leader of the Council                                                                                                                             |
| Decision type:                       | Non key decision                                                                                                                                  |
| Ward(s) to which the report relates: | All                                                                                                                                               |
| Summary:                             | This report provides an update on the activity of the Greater Manchester Combined Authority.                                                      |

## 1. Background

This report provides an update on work of the Greater Manchester Combined Authority (GMCA) and other Greater Manchester joint authorities following an update to Council in July 2026.

## 2. GMCA Forward Plan

The GMCA has published its forward plan for the coming months, 1<sup>st</sup> September – 31<sup>st</sup> December 2026

The register outlines the key decisions which are due to be undertaken by the GMCA, Mayor, GMCA and AGMA Executive Board, TFGM Committee, GMCA Resources Committee, GMCA Waste and Recycling Committee and the statutory officers of the GMCA

A summation of the key upcoming decisions can be found below, and the full list can be accessed at: [https://democracy.greatermanchesterca.gov.uk/Extranet/mgListPlans.aspx?RPId=136&RD=0&bcr=1&\\$LO\\$=1](https://democracy.greatermanchesterca.gov.uk/Extranet/mgListPlans.aspx?RPId=136&RD=0&bcr=1&$LO$=1)

## Green City Region

1. Appointment of technical advisers to the Waste & Resources Team – *September 2026*
2. Appointment of suppliers for GM Warm Homes: Local Grant delivery – *September 2026*
3. Greater Manchester Climate Adaptation Strategy and Action Plan – *25 Sep 2026*

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## Transport

1. Bus Franchising (contracts, services, assets) – *Between 1 Aug and 31 Oct 2026*
  2. Bus Depot Acquisitions – *Between 1 Aug and 31 Oct 2026*
  3. Bus Depot Leases (Tranche 2 and 3) – *Between 1 Aug and 31 Oct 2026*
  4. Bus Depot Acquisitions Treasurer Decision (Tranches 1, 2 & 3) – *Between 1 Aug and 31 Oct 2026*
  5. Subsidised Services – *Between 1 Aug and 31 Oct 2026*
  6. Integrated Settlement Funding – *Between 1 Aug and 31 Oct 2026*
  7. Active Travel Programme – *Between 1 Aug and 31 Oct 2026*
  8. Local Growth Deal (1, 2 and 3) six-monthly progress update – *Between 1 Aug and 31 Oct 2026*
  9. Transport Network Planning and Review Process – *Between 1 Aug and 31 Oct 2026*
  10. Bee Network Fares and Ticketing Products – *Between 30 Jul and 31 Dec 2026*
- 

## **Resources and Investment**

1. Greater Manchester Business Funds – *Between 1 Aug and 31 Oct 2026*
  2. GM Investment Funds / GM Brownfield Funding Programme / GM Good Growth Fund – *Between 1 Aug and 31 Oct 2026*
  3. Revenue and capital budget updates – *Between 1 Aug 2026 and 28 Feb 2027*
- 

## **Housing First**

1. GM City Deal Receipts - Investment Approval Recommendations – *Between 1 Aug and 31 Oct 2026*
  2. Greater Manchester Housing Funds – *Between 1 Aug and 31 Oct 2026*
  3. Agreement to using further Greater Manchester Housing Investment Loan Fund surpluses – *Between 1 Aug and 31 Oct 2026*
  4. Greater Manchester Property Funds – *Between 1 Aug and 31 Oct 2026*
  5. Women In Safe Homes (WISH) – *Between 1 Jun 2026 and 31 May 2029*
- 

## **Economy, Innovation, Culture & International**

1. Atom Valley Northern Gateway Mayoral Development Corporation Business Plan Approval – *September 2026*
  2. Bolton Mayoral Development Corporation (MDC) Consultation Outcomes and Final Approval – *Between 1 Sep and 25 Sep 2026*
  3. Made Smarter Adoption: Supplementary Funding for 2026-27 – *Between 28 Aug and 25 Sep 2026*
  4. Oldham Mayoral Development Corporation (MDC) Consultation Outcomes and Final Approval – *Between 1 Sep and 25 Sep 2026*
  5. Middleton Mayoral Development Corporation (MDC) Consultation Outcomes and Final Approval – *Between 1 Sep and 25 Sep 2026*
  6. Ashton and Stalybridge Mayoral Development Corporation (MDC) Consultation Outcomes and Final Approval – *Between 1 Sep and 25 Sep 2026*
- 

## **Technical Education & Skills**

1. Future Employment Support – *September 2026*
- 

## **Safer and Stronger Communities**

1. Severe Weather Early Warning and Informing – *September 2026*
- 

## **Digitally Connected Places and People**

1. Data Centre Strategy for Greater Manchester – September 2026

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## Everyday Support in Every Neighbourhood

1. Inclusion Health: Primary Care Led Multiple Disadvantage Support – 1 Nov 2026

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## Equalities and Communities

1. Decision on Spend of VCFSE Infrastructure Grant (£696,800) for 2026/27 Financial Year – Before 31 Aug 2026

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### 3. RFGM Update

#### New food waste campaign

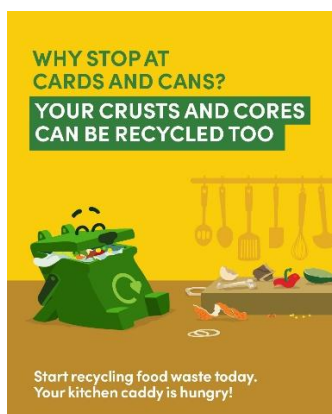
In July, we launched our new food waste campaign. This was designed to encourage residents in Bury and across Greater Manchester to use their food waste service.

Using insight from Greater Manchester residents, we developed the campaign to tackle three main barriers for residents who don't recycle food waste:

- Believing they don't have any food waste
- Finding the food waste recycling process unpleasant — the “yuck factor”
- Not having the right bins or caddies to recycle food waste

The campaign was led by Crumbs the kitchen caddy, a character we developed who mimics pet behaviour such as begging for food waste. We wanted to equate food waste with other materials, such as cardboard or cans, that most residents are already recycling at home. We created an animation and supporting graphics that explain the difference between food waste and wasting food and remind residents to use their food recycling service that's provided for them by Bury Council. As well as this, the campaign shares practical tips on keeping their kitchen caddy fresh and clean and directs them to order a kitchen caddy if they've not got one at home.

The campaign launched with three weeks of out-of-home advertising in key locations, including digital screens at bus stops and outside supermarkets. These included Tesco in Woodfields Retail Park in Bury. We also ran advertising in The Bury Times throughout July and August, featuring key campaign artwork. A social media toolkit was shared with colleagues at Bury Council for them to share directly with residents and extend the campaign's reach.



## Library education sessions

Recycle for Greater Manchester's Education team delivered three outreach sessions to libraries in Bury during the summer holidays. These were advertised by the libraries as a bespoke session on recycling as part of their summer programme. The sessions involved the 'Right Stuff, Right Bin' card-sorting activity, which is an engaging way of highlighting items that are often missed by residents recycling at home like aerosols, and items that are often incorrectly recycled at home like takeaway coffee cups. As part of the session, we also delivered a craft activity, making a gift bag out of unused wallpaper.

The sessions were delivered at Prestwich Library, Bury Library and Ramsbottom Library. They were well-received by attendees, with 15 adults and 23 children in attendance on one of the hottest days of the summer.

## Recycling Centre Rates

### June 2026

| HWRC                   | Month | YTD |
|------------------------|-------|-----|
| Every St, Fernhill     | 63%   | 61% |
| Cemetery Rd, Radcliffe | 64%   | 62% |

### Contact us

<https://recycleforgreatermanchester.com/>

Email: [recycle4gm@greatermanchester-ca.gov.uk](mailto:recycle4gm@greatermanchester-ca.gov.uk)

Michelle Whitfield

Head of Communications & Behavioural Change

[Michelle.whitfield@greatermanchester-ca.gov.uk](mailto:Michelle.whitfield@greatermanchester-ca.gov.uk)

## 4. TFGM Update

### August/September 2026

#### Bee Network updates

#### Bus Network Development update

Extra night buses, new routes and more frequent services have been rolled out across the Bee Network at the end of August and in early September.

Almost two thirds of the service enhancements announced in March 2026 have now launched, the most significant upgrade to the Bee Network since bus franchising was completed last year. The remaining improvements will be delivered from 31<sup>st</sup> January 2027.

Outlined below are the changes to services in Bury:

| Services | Intervention | Implementation date |
|----------|--------------|---------------------|
|----------|--------------|---------------------|

|               |                                                                                                                                                                                                        |            |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| 95            | Improvements to the timetable at weekends and evenings, supporting improved connections between Salford and Bury, linking communities in the south of the borough.                                     | 30 August  |
| 135 Night Bus | Continuation of night services between Manchester, Whitefield and Bury on Thursdays, Fridays and Saturdays.                                                                                            | 30 August  |
| 471           | Performance enhancements and evening and Sunday timetable improvements to the key orbital route linking Bury, Bolton and Rochdale, supporting connections to shopping, health services and employment. | 30 August  |
| 507/511       | Extra morning trips with earlier starts to improve connections with service 20 enabling shift workers to meet early start times at Logistics North                                                     | 30 August  |
| 472/474       | Improved evening services on two key routes to Ramsbottom and the north of the borough, supporting the nighttime economy and onward connections to Metrolink and other bus services.                   | Early 2027 |

Further information about these changes, along with dedicated social media assets to help promote them, is available via the following stakeholder webpage: <https://tfgm.com/better-buses-stakeholders>

### **Mayor reveals plans to launch free bus travel for 11-16 year olds**

In August, the newly elected Mayor of Greater Manchester, Bev Craig, announced plans to give 11 to 16-year-olds free bus travel on the Bee Network from January 2027. The initiative is expected to benefit almost 200,000 young people and could save families up to £500 per child each year. Applications will open later in 2026 so families can apply for their pass in advance and benefit from day one.

Previously-agreed plans to give free travel to school on Bee Network buses to children in temporary accommodation also went live on 1 September. The free school pass will be available to primary and secondary school aged children living in temporary accommodation that is located more than two miles from their school, or if they live within two miles but the route is not considered safe to walk. Parents or carers of eligible children under 12 will also be provided with a linked pass, allowing them to take their children to school and collect them at the end of the day.

### **Mayor confirms Vernon Everitt and Dame Sarah Storey to continue as Greater Manchester commissioners**

Following the election of a new Mayor, it has been confirmed that Vernon Everitt CBE will remain as Transport Commissioner and Dame Sarah Storey will continue as Active Travel Commissioner.

Both have held their roles since 2022 and have played a key role in delivering the Bee Network, Greater Manchester's integrated public transport and active travel system. The commissioners will support the next phase of the Bee Network, including the continued integration of buses, trams, cycling, walking and local rail services.

### **New £60 million Pothole Fund for Greater Manchester**

On 2 September, the Mayor announced the creation of a new £60 million Pothole Fund to repair more of the city region's roads and pavements.

The fund will be used to help keep our highways network safe and reliable, enabling transport teams to repair hotspots where surfaces are in poor condition, as well as resurface roads and pavements to prevent them from deteriorating in the first place.

The amount each GM local authority will receive is based on an agreed funding formula – with Bury's allocation standing at c£4,374,000.

The £60 million is more than the annual budget Greater Manchester councils get collectively from central government each year to maintain their roads and pavements, with the extra funding coming from the city region's transport budget - with leaders agreeing to reallocate funding towards highways maintenance.

### **Our Pass launches in Apple Wallet**

The Bee Network is introducing an easy, secure and private way for young people to use Our Pass on their iPhone or Apple Watch.

Members of Our Pass – which offers 16 to 18-year-olds who live in Greater Manchester free bus travel across the region as well as selected half-price tram tickets – can now add their Our Pass to Apple Wallet and use their iPhone or Apple Watch to travel across Greater Manchester. Our Pass holders with Express Mode enabled can simply tap their iPhone or Apple Watch to a reader when travelling - with no need to wake or unlock their iPhone or Apple Watch, or even open an app. This makes Our Pass the first dedicated travel card to be integrated into Apple Wallet in the UK.

### **Wider local updates**

#### **Bury Interchange Redevelopment**

Design work for Phase 1 (Metrolink) is now substantially complete and TfGM is currently progressing the final documentation for contract award with Willmott Dixon to deliver this first phase of works, which will create a new southern access to Metrolink (including a footbridge, lift and stairs) plus platform improvements.

Outline design for the main interchange has been completed, with the next stage of design development due to commence in September. Procurement to appoint a funding partner for the residential development is now underway; final submissions are due mid-September and will be evaluated by TfGM, GMCA and Bury Council.

Public engagement on the second phase of the work will take place throughout September with an online survey, and public drop-in sessions taking place at the following times:

- Friday 11 September: Mill Gate Shopping Centre, 10.00am to 2.00pm
- Wednesday 16 September: Bury Interchange, 7.00am to 11.00am / 1.00pm to 5.00pm
- Saturday 26 September: Bury Interchange, 9.30am to 1.30pm

### **Elton Reservoir New Metrolink Stop and Travel Hub/Park and Ride**

TfGM are continuing development work on proposals for a new Metrolink stop, Travel Hub, and Park and Ride, to be delivered as part of the strategic housing allocation identified in Places for Everyone.

TfGM will continue to work with Bury Council and wider stakeholders to develop these proposals as part of the wider masterplan for the site.

### **Metrolink Stop Improvements**

**Heaton Park:** Work is currently taking place at Heaton Park Stop to replace the lift on the Bury bound platform and is scheduled to be completed by early October. Further improvements at this stop are planned, such as replacing the shelters and making further access improvements.

### **Further Metrolink Stop Improvements:**

The wider development of the Metrolink Stop Improvements Programme continues to progress. Following on from Heaton Park Stop Improvements, TfGM is developing proposals for the next prioritised tranche, which includes Radcliffe, Prestwich and Bowker Vale on the Bury Line.

Subject to funding confirmation, TfGM intends to follow a similar procurement approach to that used for Heaton Park to appoint a contractor and deliver these improvements. Development and prioritisation of future tranches, including the remaining stops on the Bury Line, will continue as part of the wider programme.

### **Network Patronage and Performance**

#### **Transport network summary**

Patronage is reported annually. The table below shows the change in patronage across all modes, comparing June 2025 with June 2026.

| <b>Service Area (Patronage)</b> |                  | <b>Last year<br/>June 25</b> | <b>Now<br/>June 26</b> |
|---------------------------------|------------------|------------------------------|------------------------|
| Bus                             | Patronage        | 172.8m                       | 178.7m                 |
| Metrolink                       | Patronage        | 45.7m                        | 46.2m                  |
| Rail                            | Patronage        | 55.4m                        | 55.0m                  |
| Highways                        | Highway journeys | 1811.7m                      | 1853.6m                |
| Active travel                   | Cycling trips    | 50.6m                        | 50.9m                  |

Performance is reported annually. The table below shows the annual change in performance (punctuality and reliability) across bus, Metrolink, rail, and highways. Weekly bus punctuality reports are [available here](#).

| <b>Service Area (Performance)</b> |                                                                                                                   |      | <b>Last year<br/>June 25</b> | <b>Now<br/>June 26</b> |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------|------|------------------------------|------------------------|
| Bus                               | Punctuality                                                                                                       |      | <b>81.32%</b>                | <b>82.7%</b>           |
|                                   | Reliability: Bus km operated                                                                                      |      | <b>98.8%</b>                 | <b>98.9%</b>           |
|                                   | Zero-emission bus fleet (% of total bus fleet)                                                                    |      | <b>19% *</b>                 | <b>33% **</b>          |
| Metrolink                         | Punctuality (trams departing less than 2 mins late)                                                               |      | <b>88%</b>                   | <b>92%</b>             |
|                                   | Reliability: Operated mileage (number of tram vehicle miles operated compared with the number of scheduled miles) |      | <b>97.81%</b>                | <b>96.2%</b>           |
| Rail                              | Northern (NTL)                                                                                                    | PPM* | <b>83.1%</b>                 | <b>79.2%</b>           |

|          |                                                                                                                           |               |              |              |
|----------|---------------------------------------------------------------------------------------------------------------------------|---------------|--------------|--------------|
|          |                                                                                                                           | Cancellations | <b>3.7%</b>  | <b>3.4%</b>  |
|          | TransPennine Trains (TPT)                                                                                                 | PPM***        | <b>87.9%</b> | <b>86.3%</b> |
|          |                                                                                                                           | Cancellations | <b>5.1%</b>  | <b>3.7%</b>  |
| Highways | Journey time reliability (measures the % of journeys completed within the typical journey time, plus a tolerance of 25%). |               | <b>94.7%</b> | <b>93.4%</b> |

\*Percentage of ZEBs of total fleet

\*\*Percentage of ZEBs of large franchise fleet

\*\*\*Public Performance Measure (PPM), measures % of services arriving at destination, having called at all scheduled stops, within 5 minutes of the planned arrival time

### **GMCA meetings:**

Greater Manchester Combined Authority Meeting (June)

A link to the papers is available here: [Greater Manchester Combined Authority](#)

| <b>Items considered and decisions included</b>             | <b>Decisions</b>                                                                                                                                                                                                                                                                                                                                             |
|------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Chairs Announcements                                       | 1. That it be noted there were no Chair's announcements.                                                                                                                                                                                                                                                                                                     |
| Urgent Business                                            | 1. That it be noted there was no urgent business.                                                                                                                                                                                                                                                                                                            |
| Appointment of Chair 2026/27                               | 1. That it be noted that the Mayor of Greater Manchester is Chair of the GMCA (ex-officio).                                                                                                                                                                                                                                                                  |
| Appointment of Vice-Chairs 2026/27                         | 1. Paul Dennett appointed Vice-Chair.<br>2. Mark Roberts appointed Vice-Chair.                                                                                                                                                                                                                                                                               |
| GMCA Constitution                                          | 1. Creation of Investment Sub-Committee approved.<br>2. Revised Constitution adopted.                                                                                                                                                                                                                                                                        |
| Appointments to Greater Manchester Bodies                  | 1. Appointments to GMCA and associated committees and bodies for 2026/27 approved/noted as detailed in the minutes.                                                                                                                                                                                                                                          |
| GMCA Minutes - 27 March 2026                               | 1. Minutes approved as a correct record.                                                                                                                                                                                                                                                                                                                     |
| GMCA Resources Committee Minutes - 27 March 2026           | 1. Proceedings approved as a correct record.                                                                                                                                                                                                                                                                                                                 |
| GMCA Overview & Scrutiny Committee Minutes - 25 March 2026 | 1. Proceedings noted.                                                                                                                                                                                                                                                                                                                                        |
| GMCA Bee Network Committee Minutes - 26 March 2026         | 1. Proceedings noted.                                                                                                                                                                                                                                                                                                                                        |
| Delegated Decisions Taken During May-June 2026             | 1. Delegated decisions taken during May-June 2026 noted.<br><br>29/05/2026 Paul Dennett (Mayoral Decision) Decisions Appointments to Atom Valley Northern Gateway Board<br><br>29/05/2026 Group Chief Finance Officer (Mayoral Decision) Allocation of supported housing funding to Manchester City Council (80%) and to other LA schemes from remaining 20% |

|                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                              | <p>29/05/2026 Group Chief Executive Future shape of GM Adult Skills – GM Local Skills Improvement Plan</p> <p>29/05/2026 Group Chief Executive &amp; Chief Finance Officer Greater Manchester Good Growth Fund – May 2026 Allocations</p> <p>01/06/2026 Group Chief Finance Officer (Mayoral Decision) Future shape of GM Adult Skills - funding and contract approvals for AY2026/27</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Workforce Retention Review                   | <ol style="list-style-type: none"> <li>1) That the recommendations of the review be noted:</li> <li>2) Recognise early education and childcare as social and economic infrastructure enabler and its impact on prevention.</li> <li>3) Make early education and childcare a desired career choice.</li> <li>4) Increase data insight without additional burden.</li> <li>5) Champion the real living wage for all early education and childcare staff.</li> <li>6) Invest in career progression, continued professional development and training.</li> <li>7) Promote integrated models and social purpose businesses.</li> <li>8) Pursue market reform and national policy influence.</li> <li>9) Strengthen partnership working to create spaces for sector voice.</li> <li>10) That the final review be endorsed</li> <li>11) That it be noted that the final review will be shared with partners.</li> </ol> |
| Greater Manchester Race Equity Framework     | <ol style="list-style-type: none"> <li>1) That the collective progress in implementing the Race Equity Framework be noted.</li> <li>2) That the collective key deliverables for the next 12 months be agreed.</li> <li>3) That all will continue to lead, support and challenge implementation of the Race Equity Framework within their organisations and Portfolios, particularly the pursuit of evidence of impact in tackling racial inequalities.</li> <li>4) That all will champion racial equity and proactively lead commitment to anti racism at every opportunity.</li> </ol>                                                                                                                                                                                                                                                                                                                          |
| Prevention Demonstrator - Moving to Delivery | <ol style="list-style-type: none"> <li>1) That the GMCA supports the approach to mobilise the Prevention Demonstrator.</li> <li>2) That endorsement be given to the participation of all ten areas through the spread of Live Well and the contribution of Manchester, Rochdale, Stockport and Wigan to the detailed blueprinting and evaluation activities.</li> <li>3) That the alignment of resources across the key preventative programmes be maximised.</li> <li>4) That the outputs of the evaluation will be connected into medium term financial planning and devolution negotiations with government.</li> </ol>                                                                                                                                                                                                                                                                                       |
| Private Hire Vehicle Support Fund            | <ol style="list-style-type: none"> <li>1) That approval be given to the revision to the previously approved Private Hire Vehicle Support Fund by removing the loan element and moving to a grant only model, including provision for retrospective grant funding where applicants have already purchased a compliant</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>replacement vehicle and meet the eligibility criteria, as set out in the report.</p> <p>2) That the eligibility criteria for the revised fund be approved, including retrospective eligibility, as set out at paragraph 3.2. of the report.</p> <p>3) That it be noted that the revised grant-only scheme will provide a grant of £2,500 per eligible vehicle, being half the previously proposed loan amount, and is estimated to cost up to a maximum of £1.98m in total, as set out in the report.</p> <p>4) That a delegation be agreed to the Group Chief Executive, GMCA, GMFRS and TfGM, in consultation with the Mayor and GM Clean Air Lead, to finalise the implementation of the Private Hire Vehicle Support Fund prior to launch in September 2026.</p> |
|--|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## 5. Recommendation(s)

- 5.1. That Council note the updates from the Greater Manchester Combined Authority, Transport for Greater Manchester, and Recycle for Greater Manchester, with further updates to be presented to future Council meetings
- 

List of Background Papers:-

Minutes of GMCA meetings linked.

Contact Details:-

Alexander Burchell  
 Leaders Policy Officer  
 a.burchell@bury.gov.uk

## Motion: Treatment and reducing the significant spread of giant hogweed

**In the names of Councillors: Carol Birchmore, Ken Simpson, Mary Walsh, Des Duncalfe, Judi Sheppard and Mike Smith.**

### **This Council Notes:**

- Giant hogweed is a dangerous plant and is non native to the UK ecology makeup.
- The plant is now growing completely out of control in several areas especially our river valleys where the movement of water carries seed further down waterways to inhabit new areas.
- Hogweed is now in public areas to which the general public have easy access.
- The council must make use of powers to eradicate this species whenever possible on its own land and enable powers to make the treatment and eradication on private lands more enforceable.
- Provide advertising and enable the public to clearly recognise the dangers this plant holds.
- The Council is aware that work is beginning to look at the regulatory issues to resolve the root cause of this issue with the Council as a partner alongside local MPs, community groups, and other organisations.

### **This Council further recognises:**

- Giant hogweed carries extremely toxic chemicals that presents a danger to humans and some animal species.
- Most residents are still not aware of the serious consequences of any form of contact with this plant which can include serious blistering and burn like wounds when skin is exposed to sunlight
- Eradication of this plant can be achieved not only by spraying with the correct chemicals but also by root cutting and seed head removal before germination
- This plant is an imported nonnative species and adds nothing to the ecology of our landscape.
- The long-term effects of exposure to this plant can be life altering and disfiguring in humans.

**Therefore, this council resolves to continue the work it does in this area to;**

- Carry out regular surveys and work with community groups to survey council-owned land, parks, river corridors and public rights of way to identify infestations.
- Ensure that giant hogweed on council land is removed safely by trained professionals using recognised control methods.
- Continue to work in partnership with neighbouring authorities, local environmental groups and private landowners to coordinate eradication efforts across boundaries, noting that this may be in a supportive role as this requires legislative change.
- Launch a public awareness campaign so residents know how to identify giant hogweed, understand the health risks and know how to report sightings.
- Establish an easy-to-use reporting system that enables residents to notify the council quickly when new infestations are discovered.
- Prioritise the removal of Giant Hogweed on publicly accessible areas of council land and agree this in advance.

**Supporting Statement:**

The toxicity and Dangers are well recognised by councils in the UK, and the severe consequences of exposure should not be understated and must be well publicised to the general public. There has been clear and documented proof both visual in photographs and from statements and evidence of people affected. These can include blindness when contact has been made with the eyes of the unfortunate person involved. Control of Giant Hogweed is not only desirable but necessary to protect our residents.

LABOUR MOTION FOR FULL COUNCIL

## **Building a Care System That Works: Bury Council and the National Conversation on Care**

In the names of A Arif, N Bayley, C Boles, A Chaudhry, U Farooq, E FitzGerald, R Gold, D Green, S Haroon, M Hayes, J Hook, C Hunt, B Ibrahim, G McGill, C Morris, E O'Brien, T Pilkington, A Quinn, D Quinn, T Rafiq, M Rahimov, I Rizvi, M Rubinstein, L Ryder, L Smith, J A Southworth, J Southworth, G Staples-Jones, T Tariq, S Thorpe, S Walmsley

This Council notes:

1. Social Care is one of the biggest issues of our time and the system, in its current state, is unsustainable - for patients, their families, communities and councils.
2. The Prime Minister has committed to fixing the broken social care system by finding common ground across party lines, setting out a new approach to politics based on problem-solving rather than point-scoring, and drawing a line under decades of governments leaving this issue unaddressed.
3. That we welcome the cross-party approach to fixing adult social care, and that we here in Bury have a long history of working across party lines to deliver the best for our residents.
4. Baroness Louise Casey, who chairs the Independent Commission on Adult Social Care, has launched the Big Conversation on Care, a new online platform giving the public the chance to share their views and help shape the future of adult social care in England, starting with what values and principles a care system should be built on.
5. The scale of the challenge is significant: there are an estimated 1.46 million adult social care workers and 5.8 million unpaid carers in England, mostly women, proving care worth £184bn to the economy; in June 2026 an average of 13,600 people a day were medically fit to leave hospital but unable to do so, partly due to the availability of social care; and around 3,000 instances of corridor care are occurring daily as a result of pressures on hospital capacity.
6. The number of A&E attendances by people aged 65 and over has risen from 3.3 million in 2011/12 to 5.8 million in 2024/25, growth far outstripping the increase in the older population, and cuts to social care funding between 2010 and 2018 are estimated to have driven around half a million additional A&E attendances a year among people aged 65 and over.
7. In Bury, despite our strong performance in adult social care - where our recent inspections have revealed Outstanding care at Killelea and overall Good care across the system, we still face challenges in delivering the best possible care to our residents, following over a decade of cuts to funding from central government, combined with increases in demand, complexity and cost.
8. In Bury we have over 16,000 carers and in some areas of the borough the number of people providing unpaid care is as high as 10.5%. These carers perform an invaluable role but are faced with navigating an antiquated social care system that is not fit for purpose.

### **Bury Council welcomes:**

9. The pace and drive shown by the Independent Commission on Adult Social Care in working to bring forward its reporting timetable by a year, recognising the urgency felt by residents, carers, care workers, Unions and councils who cannot afford to wait for lasting reform.
10. The Prime Minister's willingness to reach across party lines, and the engagement of the opposition parties with this process, in the belief that a problem of this scale and longevity can only be solved through a settlement built to outlast any single Parliament.

### **Bury Council resolves to:**

11. Promote the Big Conversation on Care to residents, staff, carers, providers, Unions and local partners, and encourage the fullest possible local participation in it.
12. Offer this Council's full support and participation in the Big Conversation in whatever way is most useful to the Independent Commission - whether that is through local engagement events, sharing local data and case studies, or any other means the Independent Commission considers helpful.

13. Continue to work constructively with all political groups represented on this Council, and with neighbouring authorities, health partners and Unions in the same spirit of problem-solving over point-scoring as we have repeatedly done in Bury - recognising that social care reform will only endure if it is built on cross-party consensus, not the priorities of one administration or party.
14. Ask the Leader & Cabinet Member for Adult Social Care to report back to full Council on the outcomes of local engagement with the Big Conversation on Care, and on the Independent Commission's findings as they are published.

## NOTICE OF MOTION – SEPTEMBER 2026

### PROTECTING BURY'S HOSPITALITY SECTOR – OPPOSING THE GREATER MANCHESTER OVERNIGHT VISITOR LEVY

In the names of: Councillor S Arif, Councillor I Gartside, Councillor K Hussain

#### **This Council Notes:**

1. The vital contribution made by Bury's hospitality, leisure and visitor economy, including our pubs, restaurants, cafés, hotels, guest houses and other accommodation providers, which provide employment, support local businesses and bring valuable footfall into Bury, Radcliffe and other town centres.
2. The significant financial pressures already facing hospitality businesses, including business rates, VAT, energy costs, employment costs and wider increases in the cost of operating a business.
3. The Government's announcement that mayors and strategic authorities in England will be given powers to introduce an **Overnight Visitor Levy** on paid overnight accommodation, charged as a percentage of the accommodation cost.
4. That any decision to introduce such a levy in Greater Manchester would ultimately rest with the Greater Manchester Mayor and strategic authority, following consultation.
5. That Bury's hospitality and visitor economy includes many independent and smaller businesses which may be particularly sensitive to additional costs and administrative burdens.
6. That Greater Manchester already has experience of accommodation-related visitor charges, while the proposed statutory Overnight Visitor Levy would represent a new regional taxing power.
7. That the Government has stated that local leaders should consult residents and businesses before deciding whether to introduce an Overnight Visitor Levy.

#### **This Council Believes:**

1. **Bury should be a welcoming, accessible and affordable destination for visitors**, supporting rather than placing additional financial barriers in front of the businesses that serve them.
2. At a time when hospitality businesses are already under considerable financial pressure, the introduction of another charge should not be undertaken without a compelling and independently evidenced case demonstrating that the benefits outweigh the costs.
3. An additional charge on overnight accommodation could increase the cost of visiting Greater Manchester and may affect the competitiveness of Bury's hospitality businesses when visitors have alternative destinations available.
4. The priority for local and regional government should be to **back businesses, encourage investment and support employment**, rather than relying on additional taxation of the visitor economy.
5. Any assertion that an Overnight Visitor Levy will generate economic benefits must be properly tested against its potential effects on visitor numbers, accommodation businesses, employment, investment and the wider local economy.
6. **Bury businesses and residents should have a meaningful voice** in any decision which could materially affect the local visitor economy.

#### **This Council Resolves To:**

1. **Formally oppose the introduction of an Overnight Visitor Levy, tourist tax or supplementary accommodation charge affecting businesses within the Metropolitan Borough of Bury.**
2. Call on the **Mayor of Greater Manchester not to introduce an Overnight Visitor Levy** without first undertaking a full, independent assessment of its potential economic impact on Bury.
3. Request that the Leader of Bury Council writes formally to the Mayor of Greater Manchester setting out this Council's opposition and asking that Bury's hospitality businesses and residents are properly represented in any consultation or decision-making process.
4. Call for a comprehensive **Bury-specific economic impact assessment**, covering hotels and guest houses; restaurants, pubs and cafés; visitor attractions; employment; visitor numbers and spending; investment; town-centre footfall; and the competitiveness of Bury as a visitor destination.
5. Require meaningful engagement with Bury hotels, guest houses, accommodation providers, restaurants, pubs, tourism businesses, business organisations and residents before any levy affecting Bury is introduced.
6. Call on the Government to prioritise measures which support the hospitality sector, including addressing the wider burden of business rates, VAT and employment costs, rather than creating additional taxation.
7. Establish a working group involving representatives of Bury's hospitality and visitor economy, relevant business organisations and councillors from across the Council to identify **pro-growth initiatives to support the night-time and visitor economy without relying on additional taxation.**
8. Should an Overnight Visitor Levy nevertheless be introduced by Greater Manchester, require a **fair, transparent and proportionate share of revenue raised from accommodation within Bury to be retained and reinvested in Bury**, with priority given to town-centre regeneration, tourism promotion, public spaces, transport, culture and measures which directly support the visitor economy.
9. Request that the Leader reports back to Full Council on the outcome of discussions with the Greater Manchester Mayor and any proposals relating to an Overnight Visitor Levy.

## Conclusion

**This Council supports Bury's hospitality, tourism and visitor economy and the businesses, workers and communities that depend upon it.**

At a time when businesses are already facing significant financial pressures, Bury should not be asking how it can impose another charge on visitors. It should be asking how it can **attract more visitors, support local businesses, create jobs and bring greater footfall into our town centres.**

**This Council therefore calls on the Greater Manchester Mayor not to introduce an Overnight Visitor Levy affecting Bury, and to put the interests of local residents, businesses and the visitor economy first.**

| Party         | Motion                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Update for September Council                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
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| <b>Labour</b> | <p>This Council Notes</p> <ol style="list-style-type: none"> <li>1. This Labour Council is investing in every town centre across the borough, putting nearly £100m into regeneration projects to support our highstreets and local businesses. However, residents are concerned by the continued national proliferation of so called ‘dodgy shops’.</li> <li>2. Shops like these are widely reported to be fronts for money laundering, often failing to comply with regulations, and blighting our high street by crowding out genuine shops and small businesses.</li> <li>3. Such businesses are often associated with criminality that may include antisocial behaviour, theft and violent crime, drug supply and modern slavery.</li> <li>4. Recent studies from the Chartered Institute for Trading Standards shows that up to ½ of mini-marts and vape retailers, along with a third of ‘American candy stores’ are involved in illicit activities.</li> <li>5. This council recognises the strong working relationship between the council, Trading Standards, Greater Manchester Police and other enforcement agencies - which has successfully closed a number of illicit stores around the borough, including seizing goods worth around £40,000 from a property in Bury earlier this year.</li> <li>6. However, more needs to be done to crack down on illicit stores and improve our highstreets.</li> <li>7. This council notes additional powers and changes brought forward by the Labour Government, recruiting 75 new officers across forces including GMP, an additional £20m to fund a specialist cell in the National Crime Agency, additional funding for trading standards, as well as extending temporary closure powers.</li> </ol> <p>This council believes</p> | <p>Progress has been made in developing a borough-wide "Zero Tolerance" approach to illicit trading, focused on enhanced intelligence sharing, coordinated enforcement activity and the use of all available regulatory, civil and criminal powers where evidence of unlawful activity exists.</p> <p>The Council has also strengthened local enforcement capacity through the recruitment of a dedicated Tobacco and Vape Enforcement Apprentice, who has joined the Trading Standards team and commenced training to support intelligence development, enforcement activity and partnership operations.</p> <p>In addition, Bury has been identified as a priority area under the Government's new High Street Organised Crime initiative, with additional funding awarded over a three-year period to support enhanced multi-agency enforcement activity targeting illicit trading, organised criminality and associated high street crime. The funding provides further opportunities to strengthen collaborative working between enforcement partners and increase local operational capacity.</p> <p>Planning is also underway for the multi-agency summit requested by the motion, with engagement taking place between Council</p> |

| Party | Motion                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Update for September Council                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
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|       | <p>1. Thriving town centres depend on legitimate businesses operating on a level playing field.</p> <p>2. So called “Dodgy shops” engaged in criminality, money laundering, the sale of illicit goods or other unlawful practices damage public confidence, harm local economies and contribute to the decline of high streets.</p> <p>3. Additional powers from central government, as well as a focused council response, should be utilised to close businesses that are operating unlawfully.</p> <p>This council resolves to</p> <p>1. Continue working closely with Greater Manchester Police, Trading Standards, HMRC and other relevant agencies to identify and act against businesses engaged in unlawful activity, utilising new powers to increase the rate of successful interventions, closures and prosecutions.</p> <p>2. Convene a borough-wide summit, bringing together Council Officers, Trading Standards, Greater Manchester Police, Local Members, business leaders and other enforcement agencies to develop a borough-wide coordinated strategy to tackle illicit stores.</p> <p>3. Adopt and publish a “Zero Tolerance” approach to illicit trading, ensuring where businesses are found to be operating unlawfully, the Council will work with partner agencies to pursue swift enforcement and seek the strongest sanctions available under the law.</p> <p>4. Request a briefing to all members within six months setting out the scale of the issue across the borough, actions taken to date, outcomes achieved and any further measures required to protect local high streets and legitimate businesses.</p> <p>5. Reaffirm this Council’s commitment to supporting genuine local business and publicly support and utilise the enhanced enforcement powers granted to</p> | <p>officers, GMP, elected members and other key stakeholders to support development of a coordinated borough-wide response.</p> <p>A dedicated Elected Member briefing and training session has been scheduled for November 2026 to provide Members with an overview of the issue, enforcement activity undertaken, emerging trends and future priorities.</p> <p>Work will continue over the coming months to strengthen partnership activity, develop the Zero Tolerance framework, progress joint enforcement activity, convene the partnership summit and support legitimate businesses by tackling criminal activity that undermines Bury's town centres and high streets.</p> <p><b>Status: In Progress (on target)</b></p> |

| Party                  | Motion                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Update for September Council                                                                                                                               |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                        | Bury, ensuring Bury's town centres remain safe, vibrant and welcoming places for residents, visitors and investors.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                            |
| <b>Radcliffe First</b> | <p>This Council notes:</p> <ul style="list-style-type: none"> <li>• It is estimated that endometriosis impacts approximately 10% of women and those assigned female at birth of reproductive age in the UK suffer from endometriosis.</li> <li>• The intensity of the physical symptoms can vary significantly and is rated stage 1 to 4. Stage 4 is the most severe, advanced classification of the disease, characterized by widespread deep implants, large ovarian cysts (endometriomas), and dense, severe adhesions (scar tissue). Mental health and personal relationships may also be impacted negatively too.</li> <li>• Overall endometriosis is associated with a 30–50% infertility rate, women with Stage 4 (severe) endometriosis face significantly higher challenges, often resulting in infertility rates much higher than this average, with natural conception being rare.</li> <li>• Endometriosis is caused by fragments of tissue similar to the lining of the womb (endometrium). These endometriotic deposits grow outside the womb at sites such as the bowel, bladder and ovaries. These endometriotic deposits thicken, breakdown and bleed with each menstrual cycle, causing pain and many other symptoms. This can result in significant complications depending on the site of the deposit.</li> <li>• It can take many years for the diagnosis of endometriosis to be made. Diagnosis can involve multiple tests including invasive surgery.</li> <li>• The workplace impact of endometriosis is significant. People with endometriosis lose on average between 1.9 and 15.8 work hours per week depending on the severity of their condition and the treatment to help manage the condition.</li> </ul> | The team are working through the requirements for signing up to the Endometriosis Friendly Employer scheme and will provide a fuller update in due course. |

| Party         | Motion                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Update for September Council                                                                                                                                                                                                                                                                                                                                                                          |
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|               | <ul style="list-style-type: none"> <li>Becoming an Endometriosis Friendly Employer demonstrates a commitment to raising awareness of the condition, supporting staff, and promoting a positive and inclusive working environment.</li> </ul> <p>This Council believes:</p> <ul style="list-style-type: none"> <li>That Bury Council should lead by example in tackling stigma and supporting employees struggling with the impact of this potentially debilitating condition.</li> <li>That signing up to the Endometriosis Friendly Employer scheme will strengthen existing health and wellbeing commitments.</li> </ul> <p>This Council therefore resolves to:</p> <ul style="list-style-type: none"> <li>Formally apply to become an Endometriosis Friendly Employer through Endometriosis UK.</li> <li>Commit to meeting the standards required, including awareness-raising, training for managers, and support for staff.</li> <li>Publicise this status once achieved, to encourage other employers and councils to do the same.</li> </ul> <p>Endometriosis Friendly Employer Scheme - <a href="https://www.endometriosis-uk.org/endometriosisfriendly-employer-scheme">https://www.endometriosis-uk.org/endometriosisfriendly-employer-scheme</a></p> |                                                                                                                                                                                                                                                                                                                                                                                                       |
| <b>Reform</b> | <p>This Council notes that:</p> <p>Bury has a rich military history, with the Lancashire Fusiliers at its heart. To commemorate this, Bury is home to vital cultural assets including the Fusilier Museum, made up of two main galleries (The Lancashire Fusiliers (LF) and The Royal Regiment of Fusiliers (RRF)) and Bury Castle Armoury.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <div>  Castle Armoury MP Letter.docx  Castle Armoury Trustees Letter Bury </div> <p>Letters from the Group Leaders were sent to:</p> <ul style="list-style-type: none"> <li>- Bury and Heywood Drill Halls Trust</li> </ul> |

| Party | Motion                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Update for September Council                                                                                                                                                                          |
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|       | <p>Bury Castle Armoury is a Grade II Listed building which is situated on top of the original Bury Castle site and which was built in the 1800s. It represents a fundamental part of what it means to be from Bury and is a strong part of Bury's cultural identity.</p> <p>For generations, Bury Castle Armoury has stood as a reminder of Bury's proud connection to the Lancashire Fusiliers and sacrifices made by local people in service to their country. It stands as a window into the story which our community and our town can tell, and make sure that future generations are privy to that history.</p> <p>We express profound sadness at the decline and mismanagement of the asset over many years, which has resulted in the present circumstances and believe that the people of Bury are owed an explanation for how this came about.</p> <p>As a town, we all benefit richly from cultural assets such as Bury Castle Armoury. It was and can be once again a valuable educational resource for schools, colleges and community groups who can engage directly with history, military heritage and the concept of civic responsibility, helping to strengthen community pride amongst all ages. By committing to re-open the armoury as a cultural asset, the Trustees can help to give it prominence and see it flourish and it is therefore important that the site is re-opened to the public and remains operational as a cultural asset.</p> <p>Since 2022, the Council has taken a range of actions to support the repair and reopening of Castle Armoury, including:</p> <ul style="list-style-type: none"> <li>• While still open, after a visit to a Veterans breakfast where concerns were raised about the lack of maintenance and repairs, the Council</li> </ul> | <ul style="list-style-type: none"> <li>- Bury's two Members of Parliament, James Frith MP (Bury North) and Christian Wakeford MP (Bury South)</li> </ul> <p>No response has been received to date</p> |

| Party | Motion                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Update for September Council |
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|       | <p>Leader, the Armed Forces Champion and Christian Wakeford MP wrote to the Armed Forces Minister, highlighting concerns regarding the lack of maintenance at Castle Armoury and the risk this posed to its continued use.</p> <ul style="list-style-type: none"> <li>• Passing an unanimously approved motion at Full Council calling for Castle Armoury to be repaired and reopened.</li> <li>• Arranging for a letter signed by several hundred residents to be sent to the Armed Forces Minister, urging that the building be made safe and that the necessary repairs be carried out without delay.</li> <li>• Organising a public online meeting with the Chair of the Trustees and Head of the RFCA NW, providing local residents and interested parties with the opportunity to hear directly from those responsible and to express their views.</li> <li>• Convening a range of meetings between the Chair of the Trustees, Council officers, the Armed Forces Champion and the Head of the RFCA to press for urgent repairs to enable the building to reopen.</li> <li>• Working with the VFCA to support the Chair of the Trustees and provide information on potential grant funding opportunities that could assist in financing the required works.</li> <li>• Requesting enforcement action to be taken by the Trust against the RFCA to secure the necessary repairs where appropriate.</li> </ul> <p>This Council further notes that:</p> <p>According to Historic England, historic attractions in England reported a 3.1% increase in total visits from 2023 to 2024 – slightly more than the 1.4% increase reported by the wider England attractions market. England’s historic attractions</p> |                              |

| Party | Motion                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Update for September Council |
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|       | <p>benefitted from the continued recovery in inbound tourism in 2024, reporting a 15% increase in Overseas visits compared with 2023.</p> <p>Overall, again according to Historic England, there was a 10% increase in the number of school visits to historic attractions. This is higher than observed in the wider attractions sector and is a continued increase.</p> <p>Other garrison towns have succeeded in converting former military facilities into educational and tourism hubs. By doing this, the Trustees can reopen Castle Armoury as a community museum or cultural centre, an approach which would honour our past while creating new opportunities for education and inspiring pride among residents.</p> <p>The reopening of Bury Castle Armoury under present ownership could also provide a valuable source of income to ensure the sustainable running and upkeep of the building for future generations.</p> <p>This Council resolves to:</p> <ul style="list-style-type: none"> <li>• Reaffirm its cross-party, long-standing commitment to Bury's culture and history, long-standing cultural assets and its rich military history.</li> <li>• Request that all Group Leaders write a joint letter to Bury and Heywood Drill Halls Trust to demand that Bury Castle Armoury is taken off the market immediately and request that the Trustees bring forward a comprehensive paper detailing a full range of available options for both preventing any repurposing of Bury Castle Armoury and its re-opening, to include but not be limited to full repair and reopening, cost appraisals, details of possible avenues of investment to achieve the same, identification of key local and national stakeholders with whom</li> </ul> |                              |

| Party | Motion                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Update for September Council |
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|       | <p>the Trustees can work and outline a process for engagement of interested parties who may be able to assist in rectifying the current situation.</p> <ul style="list-style-type: none"> <li>Request that all Group Leaders write a joint letter to Bury's two Members of Parliament, James Frith MP (Bury North) and Christian Wakeford MP (Bury South) expressing the Council's support for this motion, seeking their backing to request allocation of part of the Government's £1.5bn fund to repair and reopen the Armoury and requesting that they support and actively seek the implementation of the other resolutions detailed herein.</li> </ul> |                              |

(i) **Urgent Cabinet Decision – August 2026**  
**Re. CYP25-154 - Multiple posts for Best Start Family Hub guidance**

**Decision taken:**

- (1) To approve the establishment of the following fixed-term posts funded through the Best Start Family Hub Development Grant:

| Post                                        | FTE | Grade    |
|---------------------------------------------|-----|----------|
| Early Years Improvement Delivery Officer    | 1.0 | Grade 12 |
| Early Years Workers                         | 2.6 | Grade 8  |
| Early Years Education and Childcare Officer | 1.0 | Grade 9  |
| Early Years Parenting Practitioners         | 2.0 | Grade 10 |
| Best Start Inclusion Practitioners          | 5.0 | Grade 8  |
| Portage Workers                             | 2.0 | Grade 8  |
| Family Hub Community Outreach Workers       | 2.0 | Grade 8  |

**Total: 15.6 FTE**

- (2) Approve recruitment to the above posts for the duration of the Best Start in Life grant funding programme.
- (3) Note that the total cost of £1,991,075 will be fully funded from Department for Education Best Start Family Hub Development Grant.
- (4) Delegate authority to the Director of Early Years, Skills and Education, in consultation with HR and Finance, to proceed with recruitment once job evaluation outcomes are confirmed.
- (5) Note the significant delivery, performance, operational and grant risks associated with any delay in approving these posts.

**The reason why this decision was urgent and could not be reasonably deferred was:**

The Best Start Local Plan was submitted to the Department for Education in June 2026 and therefore it has not been possible to progress recruitment activity any sooner. Following submission, officers have been required to develop detailed job descriptions, undertake workforce planning activity, prepare recruitment documentation and commence the Council's job evaluation process. A number of the posts still remain subject to final job evaluation outcomes.

Further delay risks significantly impacting delivery of the programme, achievement of DfE outcomes, recruitment timescales, implementation of Family Hub reforms and the Council's ability to meet grant conditions.

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