# AGENDA FOR

# CABINET

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**To:** **All Members of Cabinet**

**Councillors** : E O'Brien (Leader) (Chair), A Arif (Cabinet Member for Housing Services), R Gold (Cabinet Member for Communities and Inclusion), G McGill (Cabinet Member for Culture, Economy and Skills), C Morris (Cabinet Member for Regeneration and Growth), L Smith (Deputy Leader and Cabinet Member for Environment, Climate Change and Operations), T Tariq (Cabinet Member for Adult Care, Health and Public Service Reform), S Thorpe (Deputy Leader and Cabinet Member for Finance and Corporate Services) and S Walmsley (Cabinet Member for Children and Young People)

Dear Member/Colleague

**Cabinet**

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

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| **Date:** | Wednesday, 9 September 2026 |
| **Place:** | Bury Town Hall |
| **Time:** | 6.00 pm |
| **Briefing Facilities:** | If Opposition Members and Co-opted Members require briefing on any particular item on the Agenda, the appropriate Director/Senior Officer originating the related report should be contacted. |
| **Notes:** | |

## AGENDA


### 1 APOLOGIES FOR ABSENCE

### 2 DECLARATIONS OF INTEREST

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

### 3 PUBLIC QUESTION TIME

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

Notice of any question must be given to Democratic Services by midday on Monday, 7 September. Approximately 30 minutes will be set aside for Public Question Time, if required.

### 4 MEMBER QUESTION TIME

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

Notice of any Member question must be given to the Monitoring Officer by midday 4 September.

### 5 MINUTES *(Pages 5 - 16)*

Minutes from the meeting held on 8 July 2026 are attached.

### 6 NORTHERN GATEWAY MAYORAL DEVELOPMENT CORPORATION UPDATE *(Pages 17 - 38)*

Report of the Leader is attached.

### 7 REDEVELOPMENT OF THE ELMS, WHITEFIELD *(Pages 39 - 66)*

Report of the Cabinet Member for Regeneration and Growth is attached.

### 8 DISPOSAL OF PYRAMID PARK AND Q-PARK - PART A *(Pages 67 - 88)*

Report of the Cabinet Member for Regeneration and Growth and Cabinet Member for Housing Services is attached.

### 9 ANNUAL COMPLAINTS PERFORMANCE AND LEARNING REPORT 2025/26 AND SELF-ASSESSMENT AGAINST THE HOUSING OMBUDSMAN COMPLAINT HANDLING CODE *(Pages 89 - 156)*

Report of the Cabinet Member for Housing Services is attached.

### 10 HRA CAPITAL INVESTMENT PROGRAMME 2026.2027 MAJOR REFURBISHMENT WORKS - HEATING AND HOT WATER *(Pages 157 - 162)*

Report of the Cabinet Member for Housing Services is attached.

**11 CONTRACT AWARDS IN RESPECT OF THE HRA CAPITAL INVESTMENT PROGRAMME 2026/27 AND CARBON REDUCTION - SUSTAINABILITY IMPROVEMENT MEASURES** *(Pages 163 - 172)*

Report of the Cabinet Member for Housing Services is attached.

**12 A BED EVERY NIGHT ("ABEN”)** *(Pages 173 - 182)*

Report of the Cabinet Member for Housing Services is attached.

**13 CARE AT HOME - REQUEST TO DELEGATE THE AUTHORITY TO CONTRACT AWARDS** *(Pages 183 - 208)*

Report of the Cabinet Member for Adult Care, Health and Public Service Reform is attached.

**14 AWARD OF EVCI GM CONTRACT TO INSTALL EV CHARGEPOINTS THROUGHOUT BURY** *(Pages 209 - 216)*

**15 APPROVAL OF ACCEPTING THE DEPARTMENT FOR TRANSPORT GRANT FOR THE DEVELOPMENT OF THE 15112 BURY TO BOLTON ACTIVE TRAVEL CORRIDOR SCHEME (SPENFOLD LANE BRIDLEWAY) WITH APPROVAL TO AWARD THE DELIVERY CONTRACT** *(Pages 217 - 226)*

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

**16 CORPORATE PLAN QUARTER 1 2026-27 PERFORMANCE & DELIVERY** *(Pages 227 - 254)*

Report of the Deputy Leader and Cabinet Member for Finance and Corporate Services is attached.

**17 FINANCE Q1** *(Pages 255 - 294)*

Report of the Deputy Leader and Cabinet Member for Finance and Corporate Services is attached.

**18 2025/26 TREASURY OUTTURN REPORT** *(Pages 295 - 320)*

Report of the Deputy Leader and Cabinet Member for Finance and Corporate Services is to follow.

**19 MINUTES OF ASSOCIATION OF GREATER MANCHESTER AUTHORITIES / GREATER MANCHESTER COMBINED AUTHORITY** *(Pages 321 - 344)*

To consider the minutes of meetings of the Greater Manchester Combined Authority held on 26 June 2026.

**20** **URGENT BUSINESS**

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

**21** **EXCLUSION OF PRESS AND PUBLIC**

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

**22** **DISPOSAL OF PYRAMID PARK AND Q-PARK - PART B** *(Pages 345 - 352)*

Report of the Cabinet Member for Regeneration and Growth and Cabinet Member for Housing Services is to follow.

**23** **AWARD OF EVCI GM CONTRACT TO INSTALL EV CHARGEPOINTS THROUGHOUT BURY PART B** *(Pages 353 - 356)*

**Minutes of:** **Cabinet**

**Date of Meeting:** 8 July 2026

**Present:** Councillor L Smith (in the Chair)
Councillors A Arif, R Gold, G McGill, C Morris, T Tariq, S Thorpe and S Walmsley

**Also in attendance:** Councillors C Birchmore, J Rydeheard and D Vernon

**Public Attendance:** Members of the public were present at the meeting.

**Apologies for Absence:** Councillor E O'Brien, Councillor S Arif, and L Ridsdale

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**CA.31 Apologies for Absence**

Apologies were received from the Leader, Councillor Eamonn O'Brien, Councillor Shabaz Arif, and Lynne Ridsdale (Chief Executive).

**CA.32 Declarations of Interest**

There were no declarations of interest.

**CA.33 Urgent Business**

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.

**Decision:**

Cabinet:

1. Noted the receipt of £589,545 restricted grant funding from the Arts Council, and £65,505 match funding from Bury Council, together totalling £655,050.04, which is specifically allocated for essential and urgent repairs of the roof at Bury Arts Museum ("Building Works");
2. Noted that Bury Council as part of the funding conditions has entered a Deed of Covenant with the Arts Council dated 15th December 2025, this places a 15-year restriction over the freehold of Bury Arts Museum. This is in accordance with an earlier Cabinet approval (September 2024);
3. Noted that the Council has committed an additional £247,833.59 towards the cost of the Building Works;
4. Noted the procurement process that has been undertaken by the Council to identify a contractor to undertake the Building Works;
5. Approved the appointment of Craftsman Restoration Ltd (07339652) trading as UK Restoration Services as the contractor ("Contractor") to undertake the

Building Works, with a total estimated contract value of up to £888,801.63 (“Fee”); and

6. Noted that in line with the recommendation of the project panel, the form of contract with the Contractor, will be JCT Intermediate Building Contract with Contractor's Design 2024 Edition including amendments.

**Reasons for the decision:**

- Approval to appoint the Contractor is sought so that the urgent Building Works required to the BAM roof can commence. The Contactor has been selected by the project panel as the most qualified/experienced to carry out the work on a Grade II Listed building, and with the most competitive quote of the tenders.
- As part of the procurement process, additional due diligence was undertaken to assess both the contractor’s capacity and capability to deliver the contract. This included a review of financial standing, project references, workforce arrangements and delivery model. The Council is therefore satisfied that the contractor possesses the necessary experience, technical expertise, operational capacity and supply chain arrangements to successfully undertake the works. Ongoing performance and financial monitoring will be maintained throughout the contract to provide continued assurance during delivery.

**Alternative options considered and rejected**:
The Council has a statutory duty to protect Grade II listed buildings under the Planning (Listed Buildings and Conservation Areas) Act 1990. If the urgent repairs to the BAM roof are not carried out, the water ingress will continue, and the condition of the building will deteriorate further. There are no alternative options, as the BAM roof needs urgent repairs and the Arts Council have awarded a grant to enable this work to be carried out. If the grant is not drawn down, the work cannot continue. Do nothing is not an option as the building requires urgent work to the roof and protects the Cultural estate.

**CA.34 Public Question Time**

The following question was asked by a member of the public, Daniel Jacobs:

As part of a SAR (Subject Access Request) release, Helen Corbishley (Data Protection Officer) said the Council doesn’t hold any data internally about Tik Tok or Instagram videos or social media. On 9th June Zoe Bread posted a video about my interaction with the Council, then on 12th June there is a file that circulated in the Council labelled “all Uplands social media questions and lines in one document, shared in strictest confidence, not for onward circulation please”. Can you clarify how that statement can be true?

Councillor Lucy Smith passed to the Monitoring Officer Jacqui Dennis for a response, who advised that the Council would look into and review the matter. Councillor Smith added that Helen may have been answering generally, but that any statement made would have been in good faith. If there are specific examples we would be happy to review the matter.

**CA.35** **Member Question Time**

There were no Member questions.

**CA.36** **Minutes**

**It was agreed:**

That the minutes of the meeting held on 30 June 2026 be approved as a correct record.

**CA.37** **Corporate Plan Quarter Four 2025-26 Performance & Delivery**

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.

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.

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.

**Decision:**
Cabinet noted the Quarter Four position on progress against the Corporate Plan 2025/26

**Reasons for the decision:**
To enable transparency and robust monitoring of performance and delivery of the Corporate Plan.

**Alternative options considered and rejected:**
Not applicable.

**CA.38 Finance Update Report - 2025/26 Outturn Position**

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.

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.

**Decision:**

Cabinet:

1. Noted the 2025/26 revenue outturn position of a £7.266m overspend (3.04%) against a net budget of £238.987m;
2. Noted the in-year reduction in General Fund and Earmarked Reserves of £19.509m (30.67%) and closing balance at 31 March 2026 of £44.106m;
3. Noted the 2025/26 achievement of savings of £7.729m (68%) against a target of £11.334m;
4. Noted the overall 2025/26 capital programme outturn position of £100.413m, (84%) compared to the overall 2025/26 capital programme budget of £119.614m. This results in a £19.201m variance, mainly driven by £17.336m of rephased schemes into 2026/27, alongside £0.993m from schemes not progressed and £0.872m of savings across housing projects;
5. Approved the in-year capital slippage of £17.336m being initially transferred into 2026/27 to enable an in-year review of the deliverability of the capital programme to be undertaken and the programme re-profiled accordingly;
6. Noted the 2025/26 outturn position for the Collection Fund;
7. Noted the 2025/26 outturn position for the Housing Revenue Account (HRA); and
8. Noted the 2025/26 outturn position for the Dedicated Schools Grant (DSG).

**Reasons for the decision:**
To note the final financial outturn position for 2025/26 subject to external audit.

**Alternative options considered and rejected:**
N/A

**CA.39 Adult Social Care Performance Report for Quarter Four, 2025/26**

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.

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.

**Decision:**
Cabinet noted the report.

**Reasons for the decision:**
N/A

**Alternative options considered and rejected:**
N/A

**CA.40 Outcome of CQC local authority assessment of Adult Social Care**

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.

**Decision:**
Cabinet noted outcome of the CQC inspection of Adult Social Care.

**Reasons for the decision:**
N/A

**Alternative options considered and rejected:**
N/A

**CA.41** **Advocacy Contract Extension & Tender - Part A**

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.

**Decision:**
Cabinet:
1. Approved a tactical extension to current contractual arrangements for a further 3 months to a new expiry date of 31 March 2027.
2. Approved the authorisation to commence a tender process for an independent advocacy service, awarding a 4-year contract with the option to extend for a further 12 months, commencing on 1 April 2027.
3. Approved a delegation of contract award, following engagement, service development and tender evaluation, to the Director of Adult Social Services, with ongoing monitoring and delivery of outcomes.
4. Noted that the new advocacy contract will be funded from the adult social care community care budget.

**Reasons for the decision:**
The recommendations align with the Procurement Act 2023. It is also a legal requirement for local authorities to provide an independent advocacy service that includes; Independent Mental Capacity Advocacy (IMCA), Independent Mental Health Advocacy (IMHA), Care Act Advocacy and Independent Complaints Advocacy.

**Alternative options considered and rejected:**
- Contract expires and no re-tender – rejected as statutory duties would not be fulfilled.
- Contract not extended and re-tendered for 1 January 2027 – rejected owing to the impact of legislative changes in relation to DoLS ruling on 2 June 26 not being fully clarified, CYP commissioners' scoping work for an all-age contract not being complete, GM ICB decision to jointly commission a service not known in time, and launching a new service on 1st January that involves transferring support would be unnecessarily challenging over Christmas break.

**CA.42** **Bury's Local Area SEND Monitoring Inspection**

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.

**Decision:**
Cabinet noted the outcome of the monitoring inspection and the plans for continued transformation through the local SEND Reform Plan.

**Reasons for the decision:**
To formally note the outcome.

**Alternative options considered and rejected:**
N/A

**CA.43 Alternative Provision**

The Deputy Leader and Interim Cabinet Member for Children and Young People presented a report regarding the short-term extension and recommission 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.

**Decision:**
Cabinet:
1. Approved the recommissioning of Bury's Alternative Provision offer, in line with the Alternative Provision Strategy;
2. Approved a structured programme of pre-market and stakeholder engagement including children, young people and families;
3. Approved the short-term extension of existing contractual arrangements to 31st March 2027 via a blanket call-off order to the current providers, to ensure continuity of service;
4. Approved the substantive procurement of a four-year Alternative Provision framework, with the route, two-stage Competitive Flexible Procedure or open tender, to be confirmed by the outputs of pre-market engagement; and
5. Noted that a further Cabinet report will be brought forward outlining the final delivery model, financial implications and contract award recommendations.

**Reasons for the decision:**
Cabinet approval of these recommendations will deliver several significant and interrelated benefits, for children and young people, families, education providers, and the Local Authority, as outlined in the report.

**Alternative options considered and rejected:**
- Maintain current model – rejected as it does not address gaps, rising costs, or poor outcomes.
- Redesign without engagement – rejected owing to a substantial risk of failure due to lack of market insight.

**CA.44 Prestwich Village Regeneration Project: Delivery of Phase 1A (Travel Hub) - Additional Funding Request**

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.

**Decision:**
Cabinet:
1. Approved the additional capital funding requirement of £153,009.00 to ensure the full and successful delivery of Phase 1A (Travel Hub);
2. Approved the use of the Council's Capital Programme and Medium-Term Financial Strategy to fund the above additional costs using part of the approved funding for Phase 1A that was in place prior to the CRSTS grant being offered;
3. Subject to legal approval of the terms under which it is provided, formally accepted the £14m CRSTS grant funding from Transport for Greater Manchester (TfGM) via the Greater Manchester Combined Authority (GMCA);
4. Acknowledged that, subject to the funding requirement outlined in the recommendation at Section 2.1, the allocation of £14m from the Council's Capital Programme to the Prestwich Travel Hub is no longer required, following the acquisition of £14m from the CRSTS programme to cover this expenditure; and
5. Delegated to the Director of Place, in consultation with the Monitoring Officer and Section 151 Officer, authority to take all steps necessary to implement this decision, including finalisation of any arrangements, and provision of any Council JV LLP member consents.

**Reasons for the decision:**
To successfully complete the delivery of Phase 1A (Travel Hub) within the agreed programme timeline and to meet the planning pre-commencement conditions and delivery of additional works identified since the approval for the £14m cost envelope in July 2024 that cannot currently be met by contingency. A formal acceptance of the £14m CRSTS funding is required by Bury Council to enable the grant funding to be claimed.

**Alternative options considered and rejected:**
- Not carry out the works associated with the planning pre-commencement condition, including Building Control requirements - this would prevent the Council from opening the Travel Hub.
- Not carry out the works associated with the parking control equipment - this would prevent the Council from opening the Travel Hub.

## CA.45 Pyramid Park - Remediation Main Works Contract

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.

**Decision:**
Cabinet:

1. Authorised the council to appoint and enter into a Schedule of amendments to JCT Design and Build Contract (2016) with Conlon Construction Limited (company number 00708997) as the main contractor to deliver the Pyramid Park Remediation Main Works to unlock the site for residential development, up to a total contract value of £1,554,000.00 including contingency, and term of 90 days;
2. Accepted the recommendation that Conlon Construction Limited undertake the Pyramid Park Remediation Main Works as per the estimated contract value set out in this report, subject to the agreement of any outstanding contract amendments and clarifications; and
3. Delegated acceptance of the final contract sum up to a total contract value of £1,554,000.00, including contingency, to the Director of Law and Democratic Services in consultation with the Executive Director of Place and Executive Director of Finance, and the council Leader and Cabinet Member for Strategic Growth.

**Reasons for the decision:**
Approval for the Council to appoint and enter into contract with Conlon to undertake the remediation and associated main works is required in order for the Pyramid Park scheme to progress to the construction works phase, thus enabling the full defrayment of the BLRF2 grant monies, and which upon completion of the remediation works, will unlock this key opportunity site for comprehensive future residential redevelopment.

**Alternative options considered and rejected:**

- Re-run the procurement process for a new main works contractor with a view to securing a lower contract sum - Starting the procurement process again through the same (NWCH), or an alternative PCR compliant framework, would result in significantly delaying the start-on-site date for the remediation works, by several months. Due to the unique nature of the remediation works, it is highly likely that re-running the procurement process would not result in a lower contract value or realise cost savings for the council. Further scheme prolongation, at this point in time, would expose the council to build cost inflation which continues to rise.
- Do nothing and / or return the BLRF2 grant to OPE - By failing to appoint the prospective contractor to remediate the site and thus, defray the outstanding BLRF2 grant monies, in line with the agreed GFA delivery milestones, it would severely affect the long-term viability of the site for realising future residential development and the positive outcomes and improvements associated with it. This is due to the large abnormal costs and complex technical work required to bring the site forward for development, that only the allocated BLRF2 grant could feasibly support.

## CA.46 Economic Development & Regeneration Grant Funding

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.

**Decision:**
Cabinet:
1. Noted the update and the allocations for the Economic Development & Regeneration Grant Funding for 2025/26;
2. Approved the proposals submitted to GMCA as listed below for Economic Development & Regeneration Grant Funding 2026/27;
3. Delegated powers to Executive Director of Place in conjunction with Portfolio holders and the Director of Finance to make changes to the programme as issues arise through the year; and
4. Noted the special requirements of the grant and vesting arrangements for EDRGF funding pertaining to the Casewell's and Midlands Events LTD.

**Reasons for the decision:**
N/A

**Alternative options considered and rejected:**
N/A

**CA.47 Exclusion of Press and Public**

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

**CA.48 Advocacy Contract Extension & Tender - Part B**

The Cabinet Member for Adult Care, Health and Public Service Reform presented the Part B report, which included the full financial details.

**Decision:**
Cabinet:
1. Approved a tactical extension to current contractual arrangements for a further 3 months to a new expiry date of 31 March 2027.
2. Approved the authorisation to commence a tender process for an independent advocacy service, awarding a 4-year contract with the option to extend for a further 12 months, commencing on 1 April 2027.
3. Approved a delegation of contract award, following engagement, service development and tender evaluation, to the Director of Adult Social Services, with ongoing monitoring and delivery of outcomes.
4. Noted that the new advocacy contract will be funded from the adult social care community care budget.

**Reasons for the decision:**
As for Part A.

**Alternative options considered and rejected:**
As for Part A.

**COUNCILLOR LUCY SMITH**
**In the Chair**

**(Note: The meeting started at 6.00 pm and ended at 7.36 pm)**

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Bury Council

| 5.1 Classification: Open | Decision Type: Non-Key |
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| **Report to:** | Cabinet | **Date:** 09 September 2026 |
| **Subject:** | Northern Gateway Mayoral Development Corporation Update (Part A) | |
| **Report of** | Leader of the Council | |

## Summary


1. The Atom Valley Northern Gateway Mayoral Development Corporation (MDC) was established in January 2026. This followed the relevant statutory process, supported by Rochdale Council working in partnership with Bury Council and the Greater Manchester Combined Authority (GMCA).

2. The MDC will progress delivery of the Northern Gateway sites, providing a significant boost to employment opportunities, new homes, infrastructure and economic growth locally.

3. At its meeting in July 2025, where Cabinet approved creation of the MDC, it also noted that a further report would be presented outlining the operational arrangements for hosting the MDC in Rochdale, its associated operating costs and to confirm how these costs will be shared and funded between the MDC partners. This report sets out those arrangements.


## Recommendation(s)

4. It is recommended that Cabinet:

4.1 Note and approve the MDC operational arrangements, costs, and cost sharing approach as set out at Appendix 2.

4.2 Authorise and delegate to the Executive Director for Place and Director of Legal and Democratic Services the negotiation, preparation, and completion of the necessary contractual arrangements to provide for the MDC operational arrangements, costs, and cost sharing as set out at Appendix 2.

4.3 Note and approve the GMCA's offer to contribute additional grant funding of up to £300,000 per year to in-part fund the MDC for a period of three years from 2026/27 to 2028/29.

4.4 Authorise and delegate to the Executive Director for Place and Director of Legal and Democratic Services the negotiation, preparation, and completion of the necessary contract(s) in relation to the GMCA's additional grant funding to provide for the MDC (referred to at recommendation 4.3 above).

4.5 Note the GMCA's offer of an interest free loan of up to £877,000 to support Bury Council making its contribution towards MDC costs and authorise the Council's Finance Team to undertake the necessary assessments under the Council's Treasury Management Strategy and associated Prudential Indicators to determine its merits and the necessary approval process required before entering into such a loan, pursuant to the Constitution of this Council.

**Reasons for recommendation(s)**

5. In March 2025, Cabinet endorsed the creation of an MDC as the preferred delivery vehicle for the Northern Gateway and most appropriate route to achieve the Strategic Development Vision for Northern Gateway, endorsed by Cabinet in November 2024.

6. As set out in the report to Cabinet in July 2025, Rochdale Council will host the MDC with Bury Council to act as the partner authority for an initial period of 2 years with reviews every 5 years thereafter, with the operational resource costs of the MDC shared equally between the Councils.

**Alternative options considered and rejected**

7. A core principle of the MDC from the outset has been that both Bury and Rochdale Councils will contribute equally to its costs, therefore no alternative split of costs has been considered.

8. Alternative operational arrangements, including Bury Council being the initial host authority, were considered as the MDC proposal was developed. Rochdale Council was considered to have the operational capacity to be the initial host authority.

9. The review cycle for hosting arrangements was proposed to be 5 years throughout the lifetime of the MDC. This was reduced to 2 years for the first review as this was considered a suitable period for the MDC to stabilise, and a point at which the respective circumstances of the Councils, with respect to operational capacity to support the MDC, may have changed.

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**Report Author and Contact Details:**

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*Department: Place*
*E-mail: h.good@bury.gov.uk*

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**Background**

10. In March 2025, Cabinet approved the creation of an MDC as the preferred delivery vehicle for the Northern Gateway along with the boundary within which

the MDC will operate. A public consultation was subsequently undertaken by the Mayor, supported by Bury and Rochdale Councils and the GMCA.

11. In July 2025, Cabinet noted the outcome of the consultation and recommended to the GMCA to approve the creation of the MDC. In addition, Cabinet delegated the Northern Gateway Strategic Board to finalise the draft governance and operational arrangements for the MDC and noted the approval of the constitution sits with the MDC.

12. It also placed a requirement that these arrangements, the associated costs, and how those costs will be shared and funded between the MDC partners, would be reported back to Cabinet. These arrangements are set out in Appendix 2.

13. The MDC is governed by the MDC Board, with the following Members, who have full voting rights:

    Stephen Dance OBE – Chair & Private Sector Member
    Marian Sudbury OBE – Private Sector Member
    Ian Marchant – Private Sector Member
    Councillor Eamonn O'Brien – Leader, Bury Council
    Councillor Dene Vernon – Bury Council
    Councillor Neil Emmott – Leader, Rochdale Council
    Councillor Stephen Anstee – Rochdale Council

    This composition ensures local control and balanced Political leadership, while capitalising on specialist knowledge and experience brought by the Private Sector Members.

14. The Board is also supported by senior officers and representatives from the following organisations, who are Observers and do not have voting rights:

    Bury Council
    Rochdale Council
    GMCA
    Transport for Greater Manchester
    Department for Transport

15. The Business Plan and Annual Delivery Plan of the MDC was approved by Cabinet in November 2025. Work to develop these documents is ongoing following the establishment of the MDC Board however, priority areas of focus are:

    Investment Strategy;
    Land Strategy;
    Transport;
    Infrastructure;
    Social Value; and
    Innovation.

16. A review of the Business Plan and Annual Delivery Plan will take place, in alignment with development of monitoring arrangements to ensure ongoing satisfactory performance of the MDC. Approval will be sought from Cabinet in advance of adoption by the MDC.

17. MDC resources have been aligned with the workplan activities to ensure the workplan is delivered in a timely manner.

**Finance**

18. Finance implications of the MDC are set out in Appendix 2.

19. The costs of the MDC, net of any external contributions, will be shared equally between Rochdale Council and Bury Council as host and partner authorities respectively.

20. The GMCA has offered to contribute up to £300,000 of grant funding per annum, for a period of three-years from 2026/27 to 2029/29, to the operational costs of the MDC. GMCA has offered an interest free loan to Bury Council for the Council's £877,000 anticipated remaining contribution towards MDC operational costs for the period 2026/27 to 2029/30, with the intention of repayment being conditional upon receipt of Business Rates from the site. Consideration of whether this is compliant with the Council's Treasury Management Strategy and Prudential Indicators is to be carried out by the Council's finance function.

21. Rochdale Council's finance function will take a leading role in providing financial services to the MDC as host authority, supported by counterparts in Bury Council.

**Legal**

22. Under the Localism Act 2011, the MDC has a duty to retain responsibility for the exercise of its statutory functions, maintain appropriate governance, financial and accountability arrangements, and ensure that any hosting or shared-service arrangements do not obscure its legal responsibility, accountability or decision-making authority.

23. Officers, including both Councils' Legal Services, will support the development, agreement, and completion of legal agreements between the MDC and both Councils, securing the hosting and partnering arrangements set out in this report.

24. Officers, including both Councils' Legal Services, will support the development, agreement, and completion of legal agreements between GMCA and the Council in relation to any additional funding arrangements set out in this report.

**Human Resource**

25. As the host authority Rochdale Council will provide human resources support to the MDC. The costs thereof will be shared equally between Rochdale Council and Bury Council as host and partner authorities respectively.

26. As part of the hosting arrangements, any new roles in the MDC core team will be established by Rochdale Council.

**Planning**

27. In May 2025 full Council approved the establishment of a Joint Planning Committee with Rochdale Council to determine planning and related applications where they include land in both Bury and Rochdale administrative boundaries at Northern Gateway, Places for Everyone sites JP Allocations 1.1 and 1.2.

28. The operation of the MDC is separate to the operation of the Local Planning Authorities and the established Joint Planning Committee, which Bury Council will lead.

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**Links with the Corporate Priorities:**

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

30. As Bury’s largest employment allocation within the Places for Everyone plan, Northern Gateway supports delivery of the Vision 2030 and ‘Let’s Do It!’ to stand out as a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation through the development of employment space to enable job creation and upskilling of residents, leading to economic growth:

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

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

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

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

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**Equality Impact and Considerations:**

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

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**Environmental Impact and Considerations:**

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

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**Assessment and Mitigation of Risk:**

| **Risk / opportunity** | **Mitigation** |
|---|---|
| MDC operational arrangements, costs, and cost sharing approach are not noted, preventing the further implementation of the MDC Business Plan and annual Delivery Plan and delivery of critical path workstreams identified as essential to drive forward the delivery of the site. | • Continued engagement with and involvement of senior officers, legal, finance and HR professionals;<br>• Regular reporting through the established Northern Gateway governance arrangements. |
| Approach to funding, through commitment from GMCA to in-part fund the MDC and the agreement in principle to access an interest free loan from GMCA for the remaining Bury Council contribution, is not noted resulting in insufficient budget to fund MDC operational costs and putting at risk the agreed cost sharing approach with Rochdale Council. | • Agreement of the overall operating costs of the MDC to be formally presented to the Council.<br>• Agreement to fund the MDC, and the level of funding to be provided, delegated to the Executive Director of Place in consultation with the Director of Finance |

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**Procurement Implications:**

No direct procurement implications.

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**Legal Implications:**

33. The Atom Valley Northern Gateway Mayoral Development Corporation (MDC) is a statutory body established under Part 8 of the Localism Act 2011 and the Greater Manchester Combined Authority (Functions and Amendment) Order 2017. The purpose of an MDC is to secure the regeneration of its defined mayoral development area.

34. The Atom Valley Northern Gateway Mayoral Development Corporation (MDC) was established in January 2026 following approval, in part, from Cabinet which delegated Bury Council's operational oversight of the MDC to the Joint Strategic Board.

35. This report responds to Cabinet direction that it be provided with an update on the development of the operational arrangements for hosting the MDC in Rochdale, its associated operating costs and to confirm how these costs will be shared and funded between the MDC partners. This report sets out those arrangements.

36. The proposed financial arrangements should be verified and validated by the Council's Finance Service.

37. There is no statutory requirement for the MDC to be hosted by, or operate independently from, a combined authority or local authority. However, as a separate statutory corporation established under the Localism Act 2011, the MDC must retain responsibility for the exercise of its statutory functions, maintain appropriate governance, financial and accountability arrangements, and ensure that any hosting or shared-service arrangements do not obscure its legal responsibility, accountability or decision-making authority.

38. Consequently, formal hosting arrangements will need to be developed and adopted which should at least include;
    - a Hosting Agreement and/or Shared Services Agreement between MDC and Rochdale, and
    - an associated Partnering Agreement between Rochdale and Bury.

    The contractual arrangements above could also be achieved by a tripartite Hosting and Partnering Agreement.

39. The Council's Legal Service is currently and actively engaging with peers at Rochdale to obtain assurance on its hosting arrangements with MDC and to draw up the necessary contracts.

40. Upon Cabinet approving the GMCA's additional grant funding to support the MDC the Council's Legal Service will consider and advise on the contractual arrangements proposed by the GMCA upon which the Executive Director of Place and Director of Legal and Democratic Services will determine whether or not to complete contract documents under their delegated authority provided under this Report.

41. Insofar as the GMCA's proposed interest free loan. Officers have been advised that any such must be referred for assessment by Finance Services Treasury officers as explained in the Report. Following this assessment any decision to enter any such loan will be made pursuant to the decision-making process of the Constitution which may well require a referral back to Cabinet for approval.

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**Financial Implications:**

The financial implications are outlined in the report. The outcome of the review of the GMCA's proposed interest free loan will be brought back to Cabinet for approval.

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**Appendices:**

1. Appendix 1 – Equality Impact Assessment (PART A)
2. Appendix 2 – MDC operational arrangements and costs summary (PART A)

**Background Papers:**

1. Cabinet Report and appendices July 2022 https://councildecisions.bury.gov.uk/documents/s32171/Atom%20Valley%20Mayoral%20Development%20Zone%20North-East%20Growth%20Location.pdf
2. Cabinet Report and appendices November 2024 https://councildecisions.bury.gov.uk/documents/s41766/Northern%20Gateway%20-%20IZ%20Funding%20Atom%20Valley%20SOBC%20Part%20A.pdf
3. Cabinet Report and appendices March 2025 https://councildecisions.bury.gov.uk/documents/s43535/Northern%20Gateway%20-%20MDC%20Approval%20to%20Consult%20and%20Collaboration%20Agreement%20V1.5.pdf
4. Cabinet Report and appendices July 2025 https://councildecisions.bury.gov.uk/documents/s45293/Northern%20Gateway%20-%20MDC%20Approval%20to%20Proceed%20v1.3.pdf
5. Cabinet Report and appendices November 2025https://councildecisions.bury.gov.uk/documents/s46664/Northern%20Gateway%20Cabinet%20Report%20-%20PART%20A.pdf
6. Council Report Places for Everyone Joint Development Plan Adoption March 2024

https://councildecisions.bury.gov.uk/documents/s39350/Final%20PfE%20Adoption%20v1.pdf

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

| Term | Meaning |
|---|---|
| MDC | Mayoral Development Corporation |
| GMCA | Greater Manchester Combined Authority |

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# Equality Analysis Form

The following questions will document the effect of your service or proposed policy, procedure, working practice, strategy or decision (hereafter referred to as 'policy') on equality, and demonstrate that you have paid due regard to the Public Sector Equality Duty.

## 1. RESPONSIBILITY

| | | |
|---|---|---|
| **Department** | Place | |
| **Service** | Strategic Planning and Infrastructure | |
| **Proposed policy** | Following adoption of Places for Everyone Plan: A Joint Development Plan Document for nine Greater Manchester Local Authorities (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford and Wigan) 2022-2039 (The Places for Everyone Plan), work continues to progress on the Northern Gateway (PfE; JPA1.1 and JPA1.2). Following approval of the creation of the Atom Valley Northern Gateway MDC by Cabinet in July 2025 and a request to present a further report outlining the operational arrangements for hosting the MDC in Rochdale, its associated operating costs and to confirm how these costs will be shared and funded between the MDC partners, this report sets out those arrangements. | |
| **Date** | 19 June 2026 | |
| **Officer responsible for the 'policy' and for completing the equality analysis** | **Name** | Hollie Good |
| | **Post Title** | Major Project Manager: Strategic Planning and Infrastructure |
| | **Contact Number** | 0161 253 5282 |
| | **Signature** | H. Good |
| | **Date** | 19 June 2026 |

## 2. AIMS

| | |
|---|---|
| **What is the purpose of the policy/service and what is it intended to achieve?** | 'Places for Everyone' (PfE) sets out a plan for homes, jobs, and the environment across nine of the ten Greater Manchester districts (excluding Stockport). It sets out where we will build the new homes we need, where our businesses will locate to sustain and create jobs for our people, what infrastructure is needed to support the development and to protect and enhance our towns, |

| | |
|---|---|
| | cities and landscapes. It is proposed that the Plan will cover a timeframe up to 2039.<br><br>Whilst one of the key purposes of PfE is to make provision for the homes and jobs needed across the plan area in a co-ordinated and managed way, it is also about establishing a framework for reducing inequalities, improving the lives of our residents and transforming Greater Manchester into a world-leading city-region. Northern Gateway (JPA1.1 and JPA1.2) is a strategic allocation within PfE.<br><br>In March 2025, Cabinet approved the creation of an MDC as the preferred delivery vehicle for the Northern Gateway along with the boundary within which the MDC will operate. A public consultation was subsequently undertaken by the Mayor, supported by Bury and Rochdale Councils and the GMCA.<br><br>The MDC will progress delivery of the Northern Gateway sites, providing a significant boost to employment opportunities, new homes, infrastructure and economic growth locally. |
| **Who are the main stakeholders?** | The main stakeholders involved in PfE are local residents, developers, landowners, businesses, planning and development consultants, statutory consultees, infrastructure providers, interest groups and representative bodies. |

**3. ESTABLISHING RELEVANCE TO EQUALITY**

**3a. Using the drop down lists below, please advise whether the policy/service has either a positive or negative effect on any groups of people with protected equality characteristics.**

**If you answer yes to any question, please also explain why and how that group of people will be affected.**

| Protected equality characteristic | Positive effect (Yes/No) | Negative effect (Yes/No) | Explanation |
|---|---|---|---|
| Race | No | No | PfE has been subject to an Integrated Appraisal and part of this has involved and Equality Impact Assessment which has considered in its scope, the likely effects on discriminatory practices; the potential to alter the opportunities of certain groups of people; and/or effect on relationships between different groups of people, including race. |

| | | | |
|---|---|---|---|
| Disability | Yes | No | PfE includes policies that seek to ensure that all neighbourhoods are designed to enable residents to live healthier, happier and more fulfilling lives, with the barriers to doing so minimised as far as possible. This must include recognising and responding to the difficulties that people may face due to age, disability, illness or financial circumstances.<br><br>The Plan has also been subject to an Integrated Appraisal and part of this has involved and Equality Impact Assessment which has considered in its scope, the likely effects on discriminatory practices; the potential to alter the opportunities of certain groups of people; and/or effect on relationships between different groups of people, including disability. |
| Gender | No | No | |
| Gender reassignment | No | No | PfE has been subject to an Integrated Appraisal and part of this has involved and Equality Impact Assessment which has considered in its scope, the likely effects on discriminatory practices; the potential to alter the opportunities of certain groups of people; and/or effect on relationships between different groups of people, including gender reassignment. |
| Age | Yes | No | A number of the development allocations state that they will provide housing for elderly people.<br><br>PfE has also been subject to an Integrated Appraisal and part of this has involved and Equality Impact Assessment which has considered in its scope, the likely effects on discriminatory practices; the potential to alter the opportunities of certain groups of people; and/or effect on relationships between different groups of people, including age. |
| Sexual orientation | No | No | PfE has been subject to an Integrated Appraisal and part of this has involved and Equality Impact Assessment which |

| | | | |
|---|---|---|---|
| | | | has considered in its scope, the likely effects on discriminatory practices; the potential to alter the opportunities of certain groups of people; and/or effect on relationships between different groups of people, including sexual orientation. |
| Religion or belief | No | No | PfE has been subject to an Integrated Appraisal and part of this has involved and Equality Impact Assessment which has considered in its scope, the likely effects on discriminatory practices; the potential to alter the opportunities of certain groups of people; and/or effect on relationships between different groups of people, including religion or belief. |
| Caring responsibilities | No | No | |
| Pregnancy or maternity | No | No | PfE has been subject to an Integrated Appraisal and part of this has involved and Equality Impact Assessment which has considered in its scope, the likely effects on discriminatory practices; the potential to alter the opportunities of certain groups of people; and/or effect on relationships between different groups of people, including pregnancy or maternity. |
| Marriage or civil partnership | No | No | PfE has been subject to an Integrated Appraisal and part of this has involved and Equality Impact Assessment which has considered in its scope, the likely effects on discriminatory practices; the potential to alter the opportunities of certain groups of people; and/or effect on relationships between different groups of people, including marriage or civil partnership. |

**3b. Using the drop down lists below, please advise whether or not our policy/service has relevance to the Public Sector Equality Duty.**

**If you answer yes to any question, please explain why.**

| **General Public Sector Equality Duties** | **Relevance (Yes/No)** | **Reason for the relevance** |
|---|---|---|

| | | |
|---|---|---|
| Need to eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010 | No | |
| Need to advance equality of opportunity between people who share a protected characteristic and those who do not (eg. by removing or minimising disadvantages or meeting needs) | Yes | PfE will include policies that are specifically designed to make provision for special needs housing, including housing for the elderly as well as ensuring that all neighbourhoods are designed to enable residents to live healthier, happier and more fulfilling lives, with the barriers to doing so minimised as far as possible. This must include recognising and responding to the difficulties that people may face due to age, disability, illness or financial circumstances. |
| Need to foster good relations between people who share a protected characteristic and those who do not (eg. by tackling prejudice or promoting understanding) | No | |

**If you answered 'YES' to any of the questions in 3a and 3b**

**Go straight to Question 4**

**If you answered 'NO' to all of the questions in 3a and 3b**

**Go to Question 3c and do not answer questions 4-6**

**3c. If you have answered 'No' to all the questions in 3a and 3b please explain why you feel that your policy/service has no relevance to equality.**

| |
|---|
| |

**4. EQUALITY INFORMATION AND ENGAGEMENT**

**4a.** For a service plan, please list what equality information you currently have available (including a list of all EAs carried out on existing policies/procedures/strategies),

**OR** for a new/changed policy or practice please list what equality information you considered and engagement you have carried out in relation to it.

Please provide a link if the information is published on the web and advise when it was last updated?

(NB. Equality information can be both qualitative and quantitative. It includes knowledge of service users, satisfaction rates, compliments and complaints, the results of surveys or other engagement activities and should be broken down by equality characteristics where relevant.)

| Details of the equality information or engagement | Internet link if published | Date last updated |
|---|---|---|
| Following consultation on two previous drafts in 2016 and 2019 (then referred to as the GMSF), and the invitation for representation on the Publication Plan in 2021 and proposed modifications in 2023 the Inspectors have issued their conclusions that the Plan is sound and legally compliant subject to their recommended modifications. | | |

**4b.** Are there any information gaps, and if so how do you plan to tackle them?

| |
|---|
| No |

**5. CONCLUSIONS OF THE EQUALITY ANALYSIS**

| | |
|---|---|
| **What will the likely overall effect of your policy/service plan be on equality?** | Positive |
| **If you identified any negative effects (see questions 3a) or discrimination what measures have you put in place to remove or mitigate them?** | N/A |
| **Have you identified any further ways that you can advance equality of opportunity and/or foster good relations? If so, please give details.** | No |
| **What steps do you intend to take now in respect of the implementation of your policy/service plan?** | Following Members approval of the adoption of Places for Everyone, the Plan became a key part of Bury's statutory development plan and its policies will be used in the determination of planning applications.<br><br>Following adoption, there was a six-week period for applications to challenge the plan through a Judicial Review. |

**6. MONITORING AND REVIEW**

**If you intend to proceed with your policy/service plan, please detail what monitoring arrangements (if appropriate) you will put in place to monitor the ongoing effects. Please also state when the policy/service plan will be reviewed.**

| |
|---|
| The PfE Joint Plan will be continually monitored in order to determine the effectiveness of its policies. |

**COPIES OF THIS EQUALITY ANALYSIS FORM SHOULD BE ATTACHED TO ANY REPORTS/SERVICE PLANS AND ALSO SENT TO YOUR DEPARTMENTAL EQUALITY REPRESENTATIVE FOR RECORDING.**

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**Appendix 2 (PART A)**

**Atom Valley Northern Gateway Mayoral Development Corporation
Operational Arrangements and Costs – July 2026**

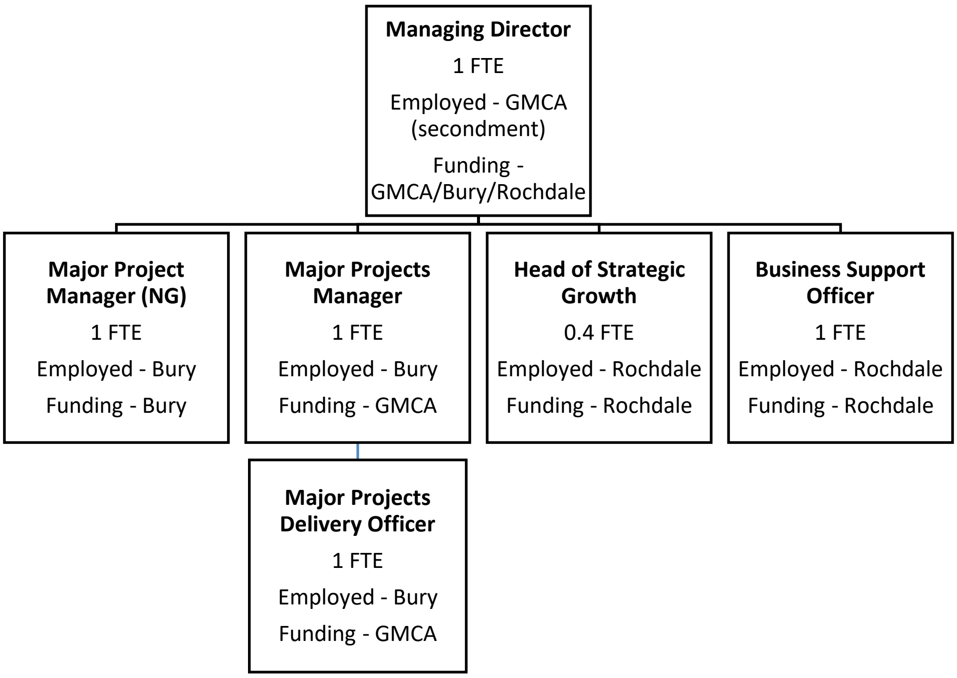
## 1. MDC Core Team & Hosting Operational Arrangements

1.1 The MDC ‘Core Team’ consists of existing Bury Council, Rochdale Council, and Greater Manchester Combined Authority (GMCA) staff. Their roles within the Core Team do not change their formal employment arrangements or terms and conditions.

1.2 Current Core Team composition, including employment and funding arrangements, is set out at Figure 1.

1.3 Any new posts are assumed to be created as part of the Rochdale Council establishment, as MDC host authority, unless there is a compelling reason to do otherwise, e.g. externally funded where another organisation is the accountable body.

*Figure 1*




1.4 Rochdale Council will provide corporate services support to the MDC. This includes finance, HR, procurement, legal, communications, and democratic services. The MDC will generally abide by Rochdale Council processes, procedures, and policies.

1.5 Operational arrangements between the Councils and the MDC will be reflected in appropriate binding legal agreements, to be entered into in due course, and monitored regularly between the partners.

1.6 The MDC Board, which includes elected members from Bury and Rochdale Councils, will be accountable for the day-to-day conduct of MDC business and delivery of the MDC Business Plan. The MDC Business Plan will be approved annually by Bury and Rochdale Councils, GMCA, and GM Mayor.

1.7 Northern Gateway benefits from existing programme governance arrangements that include senior officers from Bury and Rochdale Councils. This is largely to be incorporated into the MDC, ensuring continued visibility of operational matters to both Councils and ongoing strategic input to the MDC, to ensure alignment with partners' priorities.

1.8 Formal oversight and scrutiny of the MDC is the responsibility of the GM Mayor and GMCA, as required by Mayoral Development Corporation legislation and guidance.

## 2. MDC Operating costs

2.1 The principal operating costs of the MDC will be made up of:

- Staff costs;
- Governance/Board costs;
- Host corporate services costs; and
- Costs associated with commissioning of expert advice to support programme development.

2.2 Figure 2 sets out an indicative cost breakdown between these elements for 2026/27 – 2029/30 financial years.

*Figure 2*

| | **2026/27 (£000)** | **2027/28 (£000)** | **2028/29 (£000)** | **2029/30 (£000)** | **Total (£000)** |
|---|---|---|---|---|---|
| Staff costs | 483 | 525 | 541 | 454 | 2,003 |
| Governance/Board costs | 76 | 55 | 55 | 55 | 241 |
| Total host corporate services costs | 73 | 76 | 78 | 80 | 307 |
| Commissioning costs | 161 | 200 | 200 | 200 | 761 |
| **Total MDC Costs** | 793 | 856 | 873 | 789 | 3,312 |

## 3. Costs shared and funded between MDC partners

3.1 The principal assumption underpinning MDC cost sharing is that the net costs of MDC programme delivery are equally shared between Bury Council and Rochdale Council. This reflects the principles for MDCs in Greater Manchester agreed in January 2019 of as part of the establishment of the Stockport MDC that “there is a commitment from the host local authority to underwrite running costs”. Note in this context ‘host local authority’ means both Bury and Rochdale.

3.2 A general assumption is that Rochdale will bear new MDC costs in the first instance, which will then be subject to equalising transfers from Bury that will also account for the value of existing costs carried by each Council (e.g. MDC core team staff employment costs).

3.3 Some costs associated with the MDC are supported by contributions from other stakeholders, including GMCA, TfGM, and the Northern Gateway Development Vehicle LLP. This partially mitigates the total costs borne by Bury and Rochdale Councils. As Northern Gateway is built out these arrangements can also be extended to other landowners/developers. These contributions are identified as “Third Party Contributions” in Figure 3, and include £300,000 per year of GMCA Flagship Projects funding from 2026/27 to 2028/29.

3.4 The MDC will seek future opportunities to secure funding from alternative sources. These tend to require match funding so will not eliminate the need for MDC funding but could allow either reduced financial contributions from the Councils or allow a wider scope of activity by the MDC.

3.5 Figure 3 takes the total MDC costs for 2026/27 – 2029/30 financial years set out at Figure 2 and subtracts existing secured third-party contributions to MDC costs. This leaves the indicative net cost of the MDC budget.

3.6 It then sets out the equal split of those net costs between Bury and Rochdale Councils and how, taking account of costs incurred by each Council, that balance would be achieved through the transfer of funds between the Councils.

*Figure 3*

| | **2026/27 (£000)** | **2027/28 (£000)** | **2028/29 (£000)** | **2029/30 (£000)** | **Total (£000)** |
|---|---|---|---|---|---|
| Total MDC Costs | 793 | 856 | 873 | 789 | 3,312 |
| Third party contributions | 557 | 501 | 449 | 51 | 1,558 |
| Net MDC costs | 236 | 355 | 424 | 738 | 1,753 |
| **50% of Net MDC costs** | 118 | 177 | 212 | 369 | 877 |
| Bury existing costs | 106 | 164 | 198 | 204 | 672 |
| Bury transfer to Rochdale | 13 | 13 | 14 | 165 | 205 |
| **Total Bury costs** | 118 | 177 | 212 | 369 | 877 |
| **Total Rochdale costs** | 118 | 177 | 212 | 369 | 877 |

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

| | | |
|---|---|---|
| **Report to:** | Cabinet | **Date:** 09 September 2026 |
| **Subject:** | Redevelopment of The Elms, Whitefield | |
| **Report of:** | Cabinet Member for Regeneration and Growth | |

## 1.0 Summary


1.1 The Elms is a long-term disused Council owned brownfield site, located on Elms Close in Whitefield. In March 2024, the Cabinet approved the disposal of the site to a strategic delivery partner/member of the Council's Registered Provider Partnership Framework, for the development of an independent living scheme for residents aged 55 and over.

1.2 Since that decision, an updated feasibility assessment and cost appraisal, combined with policy directives at Greater Manchester level have identified a potential opportunity for the Council to direct deliver the scheme and retain the stock for social housing use

1.3 This change of strategy is also due to increased Homes England grant levels and the availability of additional funding sources, including retained Right to Buy receipts and affordable housing commuted sums.

1.4 Consequently, this report seeks approval for the Council to procure a multidisciplinary design team to act on its behalf to undertake a detailed feasibility study, development appraisal, cost plan, scheme design, planning assessment and viability testing, to determine the feasibility and deliverability of an independent living apartment scheme comprising approximately 16 one-bedroom social rented homes, specifically designed to support older residents. The estimated cost of this commission is in the region of £210,000 - £230,000 + VAT which there is provision for within the HRA Business Plan. The approval for award of each of the contracts for the contractors that form part of the multidisciplinary team, will be submitted to the relevant Director for approval in line with the Council's Operational Decision and Cabinet process.

1.5 If the scheme proves viable, a further report will be presented to Cabinet seeking approval to progress to the next phase of development. If direct delivery proves to be unviable, the Council will consider disposal of the site to a strategic delivery partner/member of the Council's Registered Provider Partnership Framework, in accordance with the original approach previously approved by Cabinet in March 2024 (see appendix 1).

1.6 It is proposed that the eventual scheme will be funded from retained Right to Buy receipts, affordable housing commuted sums and grant funding from Homes England where eligible.

## 2.0 Recommendations

It is recommended that Cabinet:

2.1 Approve the principle of progressing proposals for the redevelopment of The Elms through a direct delivery approach, as set out within this report.

2.2 Authorise the procurement of a multidisciplinary design team, via a compliant public sector framework to undertake the detailed appraisal, design development, planning and viability work required to assess the feasibility and deliverability of the proposed scheme.

2.3 Delegate authority to the Executive Director of Place and Executive Director of Finance to oversee delivery of this stage of the project, in consultation with the Cabinet Member for Regeneration and Growth.

2.4 Note that if the proposed scheme proves to be viable, deliverable and capable of securing planning consent, a further report and funding strategy will be presented to Cabinet seeking approval to progress to the next phase of development.

2.5 Agree that, should direct delivery prove to be unviable, the site may be disposed of to a strategic delivery partner/member of the Council's Registered Provider Partnership Framework, in accordance with Cabinet's previous decision of 13 March 2024. Any such disposal will be subject to compliance with the requirements of Section 123 of the Local Government Act 1972.

## 3.0 Reasons for Recommendations

The recommendations will:

- Act as a trailblazer project for further social housing delivery and signal Bury's commitment to the GM target of 50,000 new homes by 2039.
- Support delivery of the Council's Housing Strategy, wider regeneration priorities and Government objectives to increase the supply of social rented accommodation.
- Facilitate the Councils brownfield first approach to housing delivery by bringing a long-term vacant site back into use.
- Deliver much needed affordable housing for older residents (including those with long-term conditions), helping them maintain their independence and reduce the need for more costly interventions.
- Address identified demographic pressures, promote independent living, support health and wellbeing, and provide housing options better suited to the needs of an ageing population.
- Increase the supply of accessible and adaptable homes to meet the changing needs of an ageing population.
- Reduce ongoing costs associated with securing and maintaining a vacant site.
- Deliver wider social, environmental and economic benefits, including additional Council Tax revenue.

- Enable the Council to retain ownership of the completed development, increase its housing stock and create a long-term income stream for the HRA (Housing Revenue Account) to help sustain housing services.

3.1 The procurement of a multidisciplinary design team gives the Council the opportunity to undertake robust due diligence before committing to construction expenditure, and will provide greater certainty regarding deliverability, planning considerations, costs and funding requirements.

3.2 It should be noted that no commitment to construction or project delivery beyond the feasibility and planning stage is being sought through this report.

**4.0 Alternative Option Rejected – Disposal to a Registered Provider/Strategic Delivery Partner:**

4.1 Dispose of the site to a strategic delivery partner/member of the Council's Registered Provider Partnership Framework, consistent with the original approach.

4.2 Whilst this option would facilitate redevelopment of the site, it would forgo the opportunity for the Council to expand its housing stock, generate a long-term rental income stream and retain control over the design, quality and management of the scheme. Additionally, the anticipated capital receipt from disposal for affordable housing purposes is expected to be minimal.

**5.0 Other Options Considered and Rejected:**

**5.1 Do Nothing/Retain the Site:**

This option has been rejected due to increasing demand for housing for older people in the borough. Demographic projections indicate that demand for this type of accommodation will continue to rise over the coming years. Leaving the site undeveloped would fail to address identified housing needs. The proposed scheme will create additional housing capacity and help address gaps in provision.

This is a brownfield site located in an area of high demand for social housing. A feasibility assessment identified an independent living scheme for older people as the most appropriate use of the site, reflecting both identified local housing need and the Council's strategic priorities. The site is particularly well suited to this form of development due to its proximity to existing older persons' accommodation and its location within a well-established and supportive community.

Retaining the site would provide no strategic, social or financial benefit to the Council. The site would continue to incur maintenance and security costs whilst remaining a dormant asset.

**5.2 Disposal to a Private Developer:**

This option has been discounted as the proposed social rented independent living scheme is unlikely to be delivered through the private development market. In addition, the Council would lose the opportunity to increase its social housing stock and secure long-term rental income.

**5.3 Sell the Site Without a Defined End Use**

This option has been rejected because it would remove Council influence over the future use of the site and could result in development that does not align with local housing priorities. The site presents a strong opportunity to provide specialist accommodation for older people and contribute to wider strategic objectives.

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## 6.0 Background

6.1 The Elms is a long-term disused council owned brownfield site measuring approximately 3,122 sqm (0.3 hectares), situated within a well-established residential area off Elms Close, Whitefield. The site previously accommodated a 2.5-storey Victorian building comprising five self-contained flats. The building had been vacant for approximately three years prior to its demolition in 2023.

6.2 In March 2024, Cabinet approved the disposal of the site to a strategic delivery partner/member of the Council's Registered Provider Partnership Framework, for the delivery of an independent living scheme for residents aged 55 and over. This decision was based on a feasibility assessment which concluded that a direct delivery approach was not viable at that time.

6.3 Following an updated high-level feasibility study undertaken in May 2025 and subsequent cost appraisal completed in June 2026, the Council has reviewed its position. The results indicate that a direct delivery approach is now considered viable, due to increased Homes England grant levels and the availability of additional funding streams including Right to Buy receipts.

6.4 As a result, the Council proposes to undertake direct delivery of the site through the Housing Growth & Development Team within the Place Directorate, subject to the outcomes of further appraisal work.

6.5 Under this approach the Council would retain strategic oversight and ownership of the development, whilst the design, planning and construction stages would be delivered by appropriately procured consultants and construction contractors appointed through compliant procurement frameworks.

6.6 The intended scheme would provide circa 16 energy efficient one bed social rent apartments, to meet the needs of older people and support independent living.

6.7 The homes would be designed in accordance with Nationally Described Space Standards (NDSS). Approximately15% of the units would meet M4(3) wheelchair user standards, with the remaining homes meeting M4(2) accessible and adaptable dwelling standards, ensuring they can accommodate people with limited mobility. A scheme of this nature would enable older people to live independently for as long as possible thus generating cost savings to adult social care budgets.

6.8 It is proposed that the scheme will be funded from retained Right to Buy receipts, affordable housing commuted sums and grant funding from Homes England's Social and Affordable Homes Programme (SAHP) 2026 – 2036 where eligible.

6.9 Preliminary financial assessments undertaken by the Council's Finance Team indicate that, in the absence of borrowing costs, the development would generate a positive rental income stream for the HRA from the outset.

6.10 In recent months the Council has completed a range of preliminary site investigations including feasibility, environmental and geographical assessments, to identify potential development constraints and risk. The results of these investigations have been positive and support progression to the next stage of appraisal.

**7.0 Site Appraisal and Due Diligence**

7.1 Subject to approval, the Council will procure a multidisciplinary design team via a compliant public sector framework. The Council's Procurement Team will lead and manage the procurement process.

7.2 The appointed consultants would undertake a comprehensive appraisal of the site including a review of existing survey information, planning policy requirements, development constraints, technical considerations and delivery opportunities. The commission will include preparation of an initial development brief and planning strategy, together with the development and testing of design and cost options to identify the most appropriate form of development. The estimated cost of this commission is in the region of £210,000 - £230,000.

7.3 Design proposals will be developed in accordance with planning policy requirements, accessibility standards, Nationally Described Space Standards and recognised age-friendly housing principles that support independent living. The preferred option will be progressed through pre-application discussions with Development Control.

7.4 The design team will prepare all technical assessments required to support a future planning application, including where necessary highways, drainage, ecology, arboriculture, sustainability, viability and ground conditions reports.

7.5 The commission will culminate in the preparation of a fully coordinated planning application package, enabling the Council to fully assess the viability, cost, deliverability, planning prospects and funding requirements of the proposed scheme, before making a decision on progression to construction.

7.6 Direct delivery of the proposed scheme presents an opportunity for the Council to directly shape and deliver high-quality, age-friendly housing that meets identified local need whilst retaining control over affordability, design quality and long-term management arrangements.

7.7 The development would increase the Council's housing stock, create a long-term income-generating asset and contribute towards the financial sustainability of housing services through future rental income.

7.8 The decision to explore the possibility of direct delivery of  social housing scheme directly strongly aligns with existing Greater Manchester Strategy and new mayoral pledges around the delivery of 50,000 social and truly affordable homes by 2039, which is encouraging GM Authorities to land bank for this end use.

## 8.0 Next Steps

8.1 Subject to Cabinet approval, the Council will commence procurement of a multidisciplinary design team through an appropriate and compliant procurement framework, ensuring specialist expertise is available throughout the pre-construction phase. The appointed consultants will undertake detailed feasibility, design development, planning and viability work to establish whether the proposed development is deliverable and represents best value to the Council.

8.2 If the proposed scheme is demonstrated to be viable, deliverable and capable of securing planning permission, a further report will be presented to Cabinet seeking approval to progress to the next phase of development.

8.3 This would include progression through planning determination, completion of the detailed technical design, confirmation of project costs and funding arrangements and procurement of a construction contractor through an appropriate and compliant procurement route.

8.4 If direct delivery is ultimately deemed unviable, the Council will consider disposal of the site to a strategic delivery partner/member of the Council’s

Registered Provider Partnership Framework, in accordance with the approach previously approved by Cabinet in March 2024.

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**Links with the Corporate Priorities:**

The ‘Let’s do it Strategy’ focuses on building a better future for residents by promoting choice and inclusion. The development of an independent living scheme for the over 55’s supports the overarching principles of the strategy, as it will promote independence, increase the housing stock and generate rental income.

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**Equality Impact and Considerations:**

A full equality impact assessment has been completed. The analysis has highlighted the need for positive action to support the housing needs of some of our older residents who may also have additional needs. This proposal delivers this positive action without causing disadvantage or detriment to other groups of people

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**Environmental Impact and Considerations:**

The redevelopment of this site is expected to deliver positive environmental benefits by bringing a vacant brownfield site back into use, improving the local environment, providing energy-efficient homes and contributing towards the Council's wider sustainability and climate objectives, whilst ensuring that any adverse environmental impacts are appropriately managed and mitigated through the planning and design process.

**Assessment and Mitigation of Risk:**

| **Risk / opportunity** | **Mitigation** |
|---|---|
| Lack of confidence in the Council undertaking direct delivery. | This risk is significantly mitigated through the proposed procurement approach.<br><br>Direct delivery will be supported by the appointment of an experienced multidisciplinary design team through a compliant public sector framework to undertake feasibility, design, technical due diligence and planning work, ensuring specialist expertise is available throughout the pre-construction phase.<br><br>Any subsequent construction works will be procured through a compliant framework, providing access to suitably qualified and experienced contractors. |

| | |
|---|---|
| | Progression beyond each stage is subject to further viability assessments and Cabinet approvals, with an alternative delivery route available should direct delivery prove unviable. |
| Site constraints, abnormal ground conditions, contamination or other unforeseen technical issues could increase project costs or affect the viability of the scheme. | Preliminary site investigations have been undertaken to identify any issues or hazards that could impact development. The results of these investigations have been positive to date.<br><br>These risks will be mitigated through the appointment of a multidisciplinary professional team, before any decision is taken to progress beyond the planning stage. The planning risk is low due to the site already being classified for housing.<br>Effective management and engagement through regular meetings with consultants.<br><br>An alternative delivery route is available should direct delivery ultimately prove unviable. |
| The proposed development may not secure planning permission, or that planning conditions and statutory requirements could result in design changes and additional costs. | |
| Construction cost inflation could impact the financial viability of the project. | |
| Aborted costs if the proposed scheme is deemed to be unviable. | |
| Funding availability may differ from initial assumptions. | The proposed scheme meets the national funding priorities of the Social and Affordable Homes Programme (SAHP) 2026 – 2036. Initial, positive discussions have been undertaken with Bury's Homes England lead. |

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**Procurement Implications**

*Procurement will work with the Regeneration team to maximise Value For Money and ensure the compliance with Council Contract Procedure rules and the Procurement Act 2023*

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**Legal Implications:**

If disposal remains a potential outcome the Council will need to comply with s123 Local Government Act 1972 (or rely upon any applicable consent) at the point of disposal.

As a contracting authority, the Council is required to adhere to relevant procurement law in procuring goods, works and services, in addition to following its own Contract Procedure Rules. Both the Procurement Act 2023, and its predecessor the Public Contract Regulations 2015 provide for the utilisation of a Framework as a compliant route to market.

Cabinet may lawfully delegate executive operational decision-making to a Director under the Local Government Act 2000, subject to the Council's constitution and scheme of delegation. Any delegation must clearly define its scope and remain within approved policy and budget parameters. Changes to the programme must not constitute a new key decision unless properly authorised and compliant with procedural requirements. The Director must also comply with all conditions attached to the grant funding. Any variation outside these limits will require further Cabinet approval.

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**Financial Implications:**

The feasibility study will be funded from the approved HRA capital programme.

**Appendices:**

Not applicable

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**Background papers:**

Cabinet Report – The Elms 13 March 2024.

**Glossary of Terms:**

| Term | Meaning |
|---|---|
| Affordable Housing Commuted Sums | Financial contributions in lieu of affordable housing delivery. |
| Age-friendly housing principles | These principles aim to create a supportive and inclusive environment for older people, allowing them to age in place and contribute to their communities. |
| Brownfield site | Land that has previously been developed for residential, industrial or commercial purposes, and is now underused, abandoned or vacant. |
| Energy efficient | The practice of delivering the same service while consuming less energy to achieve savings. |
| Homes England | The UK government's housing and regeneration agency, responsible for funding and supporting delivery of new affordable homes. |
| Housing Revenue Account (HRA) | A statutory account maintained by the Council to record income and expenditure related to the housing stock. |
| Housing Strategy | A comprehensive plan that outlines how Bury intends to address it's housing needs and wider objectives. |
| M4(3) wheelchair user standards | The highest accessibility standards for new homes in England, specifically designed for full time wheelchair users. |

| | |
|---|---|
| M4(2) accessible and adaptable dwelling standards | The guidelines for designing homes that can be easily adapted to accommodate individuals with varying mobility needs. |
| Independent living scheme for older residents | A housing arrangement designed to help older people maintain independence and privacy while providing access to support when required. |
| Multidisciplinary design team | A group of professionals who will collaborate to undertake detailed feasibility, design development, planning and viability work to establish whether the proposed development is deliverable and represents best value to the Council. |
| Nationally Described Space Standards (NDSS) | Define the minimum gross internal floor area, bedroom sizes, storage space, and floor to ceiling heights to ensure homes are spacious, functional, and support long-term wellbeing. |
| Public sector framework | A pre-approved contract arrangement that allows public sector organisations to procure goods and services from a list of pre-approved suppliers. |
| Registered Provider Partnership Framework | A strategic partnership between the Council and registered providers for the delivery of affordable housing in the borough. |
| Right to Bury receipts | Income generated when council tenants purchase their homes under the Right to Buy Scheme. |
| Section 123 of the Local Government Act 1972 | Allows local authorities to dispose of land for the best consideration reasonably obtainable. |
| Social and Affordable Homes Programme (SAHP) 2026 - 2036 | A government initiative aimed at increasing the supply of affordable housing in England. It provides up to £39 billion in funding over the next 10 years to support delivery of around 300,000 social and affordable homes. |
| Social rent | A type of low cost housing where rents are set by a government formula based on local incomes, typically around 50% of market rent. |

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

| | | |
| --- | --- | --- |
| **Report to:** | Cabinet | **Date:** 13 March 2024 |
| **Subject:** | Proposed Redevelopment of The Elms for the Delivery of Accommodation for Older People | |
| **Report of** | Cabinet Member for Housing Services | |

## 1.0 Summary

1.1 This report seeks approval to dispose of The Elms in Whitefield for the delivery of an independent living scheme for the over 55's subject to procurement, to facilitate delivery of the Housing Strategy and generate savings to adult social care budgets.

1.2 The Elms is a long-term disused council owned brownfield site, located within a well-established residential area in the Unsworth Ward, Whitefield. The site was occupied by a 2.5 storey Victorian building comprising 5 flats, which had fallen into significant disrepair and had been empty for five years.

1.3 A condition survey was undertaken in October 2021 by Arcus Consultants who confirmed that reinstatement/refurbishment costs were unviable, and demolition was the best option.

1.4 Cabinet approval for the demolition of the building was obtained in June 2022. Demolition was delayed due to the need for two independent bat surveys which can only be carried out at certain times of the year. The building was finally demolished in December 2023. Works costs were funded through the Housing Revenue Account (HRA).

1.5 In May 2023 Continuum Consultants were commissioned to undertake a feasibility study and options appraisal to determine the future of the cleared site.

1.6 The feasibility study considered a range of options for the site, initially 9 in number, applying a detailed analysis, viability assessment and soft market testing exercise against each one. This study concluded in January 2024 and Continuum recommended that the delivery of an independent living scheme for the over 55's would be the best use of this site. A scheme of this nature would enable older people to live independently for as long as possible thus generating cost savings to adult social care budgets.

## 2.0 Recommendation(s)

That Cabinet:

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

2.2 Request a report back to Cabinet on the offers received with a recommendation as to the preferred bidder.2.3 **3.0 Reason for recommendation(s)**

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

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

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

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

**4.0 Alternative option(s) considered and rejected**

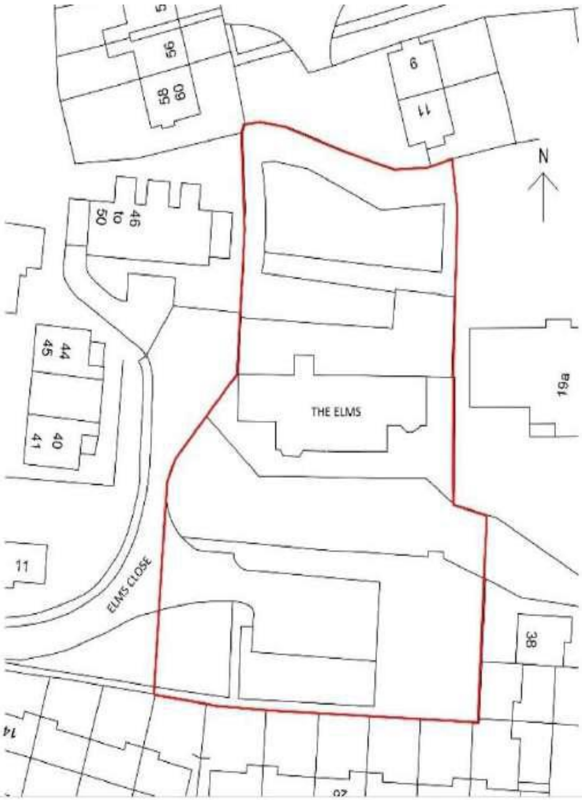
4.1 Do nothing: Bury has high levels of need for affordable housing for older people and supply is required in the marketplace immediately. This is a brownfield site in an area of high demand which is suitable for affordable housing for this cohort, to do nothing would not be an option.

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

**5.0 Background**

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

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

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

**6.0 Proposed development**

6.1 The Council's integrated commissioners for adult social care consider this site to be suitable for a housing development for older people, to help meet the needs of this cohort.

6.2 The new development would offer up to 24 apartments for social/affordable rent (the Council's preference is for social rent where possible). Grant subsidy from Homes England would be required to support development costs should a registered provider be selected to develop this scheme.

6.3 The incoming developer will be encouraged to build the new properties to a high-quality specification incorporating low carbon technologies where possible to reduce fuel bills, support natural sustainable drainage and inspire wildlife, offering significant benefits to residents, the Council and the environment.

6.5 This development would help set a standard for which future homes can be built, balancing cost benefits and lifestyles for residents. It would be developed in conjunction with the Councils integrated commissioners for adult social care.

6.6 All properties would be owned and managed by a registered provider but, the Council would retain 100% nomination rights to all homes in perpetuity.

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

**7.0 Housing need and intelligence**

7.1 There is an increasing shortage of specialist housing for older people in Bury and the number of older people is set to increase significantly by 2030. Approximately one quarter of all households currently living in the borough are older person households.

7.3 A Housing Market Position Statement undertaken in 2021 suggests that Bury needs an additional 114 units of accommodation for older people between now and 2025.

7.4 A key focus of the Housing Strategy is to address the shortfall in housing provision for older people, to drive better quality outcomes for individuals and enable more people to live independently in the borough for as long as possible. The proposed re-development of the Elms seeks to deliver on this.

**8.0 Next steps**

8.1 Senior officers from Housing and the Council's integrated commissioners for adult social care will generate a procurement brief, setting out the Council's requirements and desired outcomes for the scheme. Strategic delivery partners and members of the Council's Registered Provider Partnership Framework will be invited to submit bids through The Chest.

8.3 Applications from providers will be assessed against a range of performance criteria and quantitative and qualitative assessments, including previous experience and expertise of developing and delivering similar projects. The successful provider will work with the Council to deliver the proposed scheme.

8.4 A project plan with risk register, key milestones and timelines will be established to monitor progress, enabling the Council to take control and accelerate delivery.

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**9.0 Links with the Corporate Priorities:**

9.1 This proposal contributes towards meeting the Council's priorities across a range of policy areas including increasing the supply of affordable housing to meet the current and future housing needs of older people.

9.2 It sets out plans for the delivery of a housing development on brownfield land and an opportunity to create successful and inclusive neighbourhoods in conjunction with the ambitions of the Bury 2030 Let's do it Strategy.

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**10.0 Equality Impact and Considerations:**

10.1 This proposal demonstrates a positive impact on people with protected characteristics. It recognises the specific housing needs of older people.

10.2 The redevelopment of this site will result in the regeneration of the area, which will help improve the local environment by reducing opportunity for anti-social behaviour including fly-tipping. The development will also provide much needed affordable homes for the borough's older generation.

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**11.0 Environmental Impact and Considerations:**

11.1 The new scheme will be built to current building regulations standards and therefore deliver a high specification and design.

11.2 Nesting bricks will be encouraged to side elevations in shaded areas to provide nesting and wildlife opportunities.

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**Assessment and Mitigation of Risk:**

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

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**12.0 Legal Implications:**

12.1 A full site due diligence exercise is currently being undertaken with the Land & Property Team, the results of which will be fed into the tender exercise.

12.2 A public open space notice process will need to be undertaken prior to disposal. The notice pursuant to s123 (2A) of the Local Government Act 1972 will give members of the public the opportunity to comment on this disposal. The Council will consider any comments/objections received to the proposed disposal within 28 days of the publication of the notice.

12.3 Approval to dispose of this land has not previously been agreed for this purpose. The Council must ensure that it meets the obligations of the best value requirements of s123 of the Local Government Act 1972. A RCIS Red Book valuation has been undertaken to determine the open market value of the land. Detailed legal advice will be provided at all stages.

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**13.0 Financial Implications:**

13.1 This scheme will enable the construction of affordable homes for older people. The new homes are expected to generate savings to adult social care budgets. There is also a saving from reduced revenue costs for maintaining and securing long-term disused sites.

13.2 Disposal of land usually necessitates the expenditure of fees to support technical due diligence, marketing costs and legal fees. As this proposal will be a direct transaction, cost savings can be assumed apart from in-house legal fees.

13.3 The development proposals when complete would generate additional council tax revenue and contribute towards housing growth targets.

13.4 The Council would retain 100% nomination rights to all social rent/affordable rent properties in perpetuity. This means that these properties would constantly be available to applicants on the Council's housing waiting lists.

13.5 The costs will be funded through the Housing Revenue Account.

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**Background papers:**

**Cabinet Report 1st June 2022 Demolition of the Elms, Whitefield -**
https://councildecisions.bury.gov.uk/documents/s31626/Demolition%20of%20the%20Elms%20Whitefield.pdf

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

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

Bury Council

**Equality Impact Analysis**

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

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

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

| | |
|---|---|
| **Name of Policy/Project/Decision** | Redevelopment of The Elms, Whitefield |
| **Lead Officer (SRO or Assistant Director/Director)** | Roz Catlow-Patterson, Head of Housing Growth & Development |
| **Department/Team** | Housing Growth & Development Team (Place Directorate) |
| **Proposed Implementation Date** | TBC |
| **Author of the EqIA** | Jackie Summerscales, Strategic Housing Delivery Manager |
| **Date of the EqIA** | 30.07.26 |

| **1.1 What is the main purpose of the proposed policy/project/decision and intended outcomes?** |
|---|
| The Cabinet report seeks approval for the Council to determine the feasibility and deliverability of an independent living scheme at The Elms, Whitefield. The proposed scheme, if viable, would comprise approximately 16 one-bedroom social rented homes, specifically designed to support older residents aged 55 and over.<br><br>Older residents are under no obligation to live in these properties. Therefore, this proposal is not detrimental to the human rights of any individual affected by the decision being sought. |

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

| **2.1 Who could the proposed policy/project/decision likely have an impact on?** |
|---|
| Employees: Yes. **(state reasons for answering 'no')**. |

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

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

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

**Documentary Evidence:**

Bury's Housing Need and Demand Assessment 2025 highlights the need to meet the housing requirements of older people and those with disabilities through the provision of accessible and adaptable homes.

Demographic projections indicate that:

- Bury's population is ageing, with the number of residents aged 75-84 projected to increase by 31.2% between 2022 and 2043, while the population aged 85 and over is projected to increase by 65.3%, compared with overall population growth of approximately 7.1%. This will result in a significant increase in demand for age appropriate housing and support services.
- By 2043, residents aged 75 and over will comprise a larger proportion of the borough's population, increasing the need for accessible, adaptable and specialist accommodation that enables people to maintain their independence for longer.
- Current housing patterns indicate that many older residents are living in larger family homes. More than a third (35.6%) of households aged 65 and over occupy three-bedroom houses, while 18.2% occupy homes with four or more bedrooms. This suggests a mismatch between existing housing stock and the needs of an ageing population.
- The assessment identifies a need for a greater supply of smaller, accessible homes to support downsizing, reduce under-occupation and provide suitable accommodation for older residents whose housing needs change over time.
- Older residents express a strong preference to remain living independently. Over 75% of households aged 65 and over would like to remain in their current home with support where needed, increasing to 87.5% among those aged 85 and over. This highlights the importance of providing independent living accommodation that enables people to age well within their community.

Increasing housing choice for older people is a strategic objective across Greater Manchester. The Greater Manchester Age Friendly Strategy specifically seeks to increase housing choice to promote independence in later life.

| |
|---|
| The proposed scheme would contribute towards meeting identified housing needs for older people, providing accessible, affordable accommodation designed to support independence, reduce social isolation, and improve health and wellbeing outcomes.<br><br>There is a wider shortage of affordable housing across the borough. The provision of social rented independent living accommodation would not only respond to age related housing need but also contribute to meeting identified affordable housing needs across the borough. |
| **Stakeholder information/consultation:**<br><br>Early engagement has been undertaken with:<br><br>• Senior and other Council officers.<br>• Director of Housing.<br>• Housing Services and Adult Social Care.<br>• Housing Growth Sub Group.<br>• Regeneration Board.<br>• Portfolio holder.<br>• Homes England.<br><br>If the scheme is viable, consultation will be undertaken with local residents and ward councillors. Initial discussions held with local residents in 2024 were positive. |

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

- Could the proposal prevent the promotion of equality of opportunity or good relations between different equality groups?
- Could the proposal create barriers to accessing a service or obtaining employment because of a protected characteristic?
- Could the proposal affect the usage or experience of a service because of a protected characteristic?
- Could a protected characteristic be disproportionately advantaged or disadvantaged by the proposal?
- Could the proposal make it more or less likely that a protected characteristic will be at risk of harassment or victimisation?
- Could the proposal affect public attitudes towards a protected characteristic (e.g. by increasing or reducing their presence in the community)?
- Could the proposal prevent or limit a protected characteristic contributing to the democratic running of the council?

| 2.4 Characteristic | Potential Impacts | Evidence (from 2.2) to demonstrate this impact | Mitigations to reduce negative impact | Impact level with mitigations<br>Positive, Neutral, Negative |
|---|---|---|---|---|
| **Age** | The proposed scheme is intended for residents aged 55+; however, it does not reduce existing housing provision or opportunities available to other age groups. | The proposal is expected to have a positive impact on older people by increasing the supply of affordable, accessible, and age appropriate accommodation designed to support independent living. The scheme responds to identified demographic growth in older age groups and recognised shortages of specialist older persons' housing within the borough. While occupation of the homes would be restricted to people aged | N/A | Positive. |

| | | | | |
|---|---|---|---|---|
| | | 55 and over, this is considered a proportionate and justified response to a clearly evidenced housing need and therefore does not constitute unlawful age discrimination. | | |
| **Disability** | The proposed scheme will increase the supply of accessible, adaptable and specialist accommodation in the borough, enabling people to maintain their independence for longer. | All homes would be designed in accordance with Nationally Described Space Standards (NDSS). Approximately15% of the units would meet M4(3) wheelchair user standards, with the remaining homes meeting M4(2) accessible and adaptable dwelling standards, ensuring they can accommodate people with limited mobility. | N/A | Positive |
| **Gender Reassignment** | No impact. | | N/A | Neutral |
| **Marriage and Civil Partnership** | No impact. | | N/A | Neutral |
| **Pregnancy and Maternity** | The scheme is specifically designed to meet the housing needs of older | | N/A | Neutral |

| | | | | |
|---|---|---|---|---|
| | residents and is not expected to have a direct positive or negative impact on people who are pregnant or on maternity leave. | | | |
| **Race** | No impact. | | N/A | Neutral |
| **Religion and Belief** | No impact. | | N/A | Neutral |
| **Sex** | No impact. | | N/A | Neutral |
| **Sexual Orientation** | No impact. | | N/A | Neutral |
| **Carers** | The proposed scheme is not specifically targeted at carers and does not directly affect this group differently from other residents, although eligible carers aged 55+ may benefit from the additional housing choice provided. | | N/A | Neutral |

| | | | | |
|---|---|---|---|---|
| **Looked After Children and Care Leavers** | The scheme is intended for residents aged 55+ and is therefore not aimed at this cohort; however, it does not reduce existing housing provision or opportunities available to looked after children and care leavers. | | N/A | Neutral |
| **Socio-economically vulnerable** | The proposed scheme will increase the supply of affordable housing across the borough, to meet the needs of people on low incomes and those in receipt of Housing | The provision of social rented accommodation increases access to affordable, secure, and suitable housing for older residents who may be on low incomes or financially vulnerable. | N/A | Positive |

| | | | | |
|---|---|---|---|---|
| | Benefit/Universal Credit. | | | |
| **Veterans** | The proposed scheme is not specifically targeted at veterans and does not directly affect this group differently from other residents, although eligible veterans aged 55+ may benefit from the additional housing choice provided. | The Council gives priority for social housing to Armed Forces personnel including veterans through the Allocations Policy. | N/A | Neutral |

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

| 2.5 Characteristics | Action | Action Owner | Completion Date |
|---|---|---|---|
| | No additional actions required. | | |
| | | | |
| | | | |
| | | | |
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| | | | |
| | | | |

**Section 3 - Impact Risk**

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

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

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

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

| | |
|---|---|
| **3.2 Level of risk identified** | 0 - no risk. |
| **3.3 Reasons for risk level calculation** | No negative impact identified. |

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

| 4.1 Analysis Decision | X | Reasons for This Decision |
|---|---|---|
| There is no negative impact therefore the activity will proceed | X | |
| There are low impacts or risks identified which can be mitigated or managed to reduce the risks and activity will proceed | | |
| There are medium to high risks identified which cannot be mitigated following careful and thorough consideration. The activity will proceed with caution and this risk recorded on the risk register, ensuring continual review | | |

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

| 5.1 Sign Off | Name | Date | Comments |
|---|---|---|---|
| **Lead Officer/SRO/Project Manager** | Roz Catlow Patterson | 03/08/26 | Signed off – no revisions required. |
| **Responsible Asst Director/Director** | Rob Summerfield, Director of Regeneration and Project Delivery | 03/08/26 | Signed off – no revisions required. |
| **EDI** | Lee Cawley, Equality Diversity and Inclusion Manager | 31/07/2026 | QA Complete: The analysis has highlighted the need for positive action to support the housing needs of some of our older residents who may also have additional needs. This proposal delivers positive action and impacts for these groups of people without causing disadvantage to other groups. |

**EqIA Revision Log**

| 5.2 Revision Date | Revision By | Revision Details |
|---|---|---|
| N/A. | | |

| | | |
|---|---|---|
| | | |
| | | |
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Agenda Item 8

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

| Report to: | Cabinet | Date: 09 September 2026 |
|---|---|---|
| Subject: | Disposal of Pyramid Park and Q-Park – Part A | |
| Report of | Cabinet Member for Regeneration and Growth<br>Cabinet Member for Housing Services | |

**Summary**


1. This paper outlines proposals to dispose of council-owned, disused brownfield sites at Pyramid Park and Q-Park, and to bring forward high-quality, sustainable residential development. Situated on the edge of Bury town centre, Pyramid Park and Q-Park have long been identified as key strategic regeneration opportunity sites and are highlighted in the Bury Town Centre Masterplan (2022) as suited for residential development at scale.

2. To further our ambitious plans to deliver hundreds of new homes across the borough over the coming years, in late-2023, the council was successful in securing £1.73 million in grant funding for the Pyramid Park site from the Government's Brownfield Land Release Fund (BLRF2) programme.

3. The BLRF2 grant funding has enabled a package of land remediation and de-risking works to be delivered at the Pyramid Park site, thereby improving viability and readying it for future redevelopment. These land remediation works are currently underway and are being undertaken by the scheme contractor, Conlon Construction Limited ("Conlon"), with completion anticipated in autumn 2026. The appointment of Conlon was subject to a previous, separate report, approved by Cabinet at its meeting on 8th July 2026.

4. In line with the agreed BLRF2 grant funding milestones, upon achieving practical completion of the remediation works, Pyramid Park must be disposed of to a developer by 31st March 2027, who will be able to bring forward and realise the residential scheme at the site. The prospective developer would then be required to complete the new homes by 31st March 2029, at the latest.

5. Both Pyramid Park and Q-Park hold potential as highly sustainable, brownfield town centre sites, well suited to deliver a new, mixed typology, inter-generational housing development. This future residential scheme would be able to realise a significant element of the borough's identified housing shortfall, helping a range of cohorts to live independently in a sustainable

location, meeting a range of housing needs, and complementing the wider town centre regeneration that is taking place.

6. In its current form, Pyramid Park stands as a long-term, council-owned, vacant 7.4-acre brownfield opportunity site which has lain derelict and overgrown for over 15 years and regularly attracts anti-social behaviour, which is exacerbated due to poor visibility and a lack of natural surveillance. The site sits at a sunken level compared to its surroundings and there is limited access for pedestrians into Pyramid Park from the surrounding town centre.

7. Similarly, Q-Park is a council-owned, 1-acre brownfield site, which is highly visible, situated immediately opposite Bury Town Hall on Knowsley Street in the town centre. The three-storey Q-Park structure was designed to accommodate the future construction and loading of an additional six-storey structure atop the completed slab level, which has been confirmed by structural engineers. The undercroft car park space is in use via a long-lease agreement between the council and Q-Park Limited, whilst the airspace above has remained undeveloped and vacant since construction to slab level was completed in 2009 and its appearance is currently detrimental to the wider street scene.

8. In addition, whilst the Council is the immediate landlord of Q-Park Limited, the lease of the site was originally granted by Ask Townside (No.1) Limited. There also two additional occupational leases affecting parts of the property, with the current tenants being NHS Property Services Limited and Six Town Housing Limited. As such, the council will facilitate dialogue between the prospective developer and the aforesaid parties to ensure any obligations/rights can be accommodated and/or renegotiated as needed.

9. To accelerate housing delivery at both of these long-term vacant sites, in April 2026, the council commenced a Competitive Flexible Procedure (CFP), advertised via the Find a Tender service, the government's official platform for public sector procurement and high-value contract notices. In accordance with the Procurement Act 2023, the council has led an exercise to identify a suitable development partner who would be able to deliver the residential scheme at Pyramid Park and Q-Park.

10. Through this procurement process, Watson Construction Ltd (“Watson”) (Company number 08621624) has been selected as the council’s preferred bidder. Watson Construction Ltd is part of a group structure and an organogram detailing this company group structure can be found in Part B of this report along with an assessment of financial standing undertaken. A Parent Company guarantee will be sought with Watson Construction (Holdings) Ltd.

11. The preferred bidder was selected against specific award criteria and were assessed on a 65% quality and 35% price scoring basis. The proposal for both Pyramid Park and Q-Park aligns with the council's masterplan for a high-quality town centre mixed-residential scheme, which blends apartments and townhouses with a provision of extra-care, dementia, later living, and care leaver accommodation. The proposal seeks to deliver c.138 mix of units and mixed tenures on Pyramid Park and c.77 apartment units on Q-Park with exact numbers to be determined as part of the forthcoming planning process. Watson proposed a high standard of design and public realm, with improved connectivity provided through the site and across to Bury Interchange, ultimately fostering a new, mixed intergenerational town centre community at both the Pyramid Park and Q-Park sites.

**Recommendation(s)**

It is recommended that Cabinet:

12. Approves the plans for disposal of the sites at Pyramid Park and Q-Park, to Watson Construction Ltd (Company number 08621624) as the Development Partner.

13. Delegate the award of all contractual documents for example a Development Agreement (if applicable),lease agreements, licence and other ancillary contracts) that relate to the appointment of Watson Construction Ltd (Company number 08621624), to the Executive Director of Place and Executive Director of Finance, and the council Leader and Cabinet Member for Regeneration and Growth.

14. Delegate the disposal of Pyramid Park and Q-Park, including commercial terms (including Best Value Consideration if applicable) and eventual capital receipt, to the Executive Director of Place and Executive Director of Finance, and the council Leader and Cabinet Member for Regeneration and Growth.

**Reasons for recommendation(s)**

15. The disposal of the Pyramid Park site to a developer, and the delivery of new housing, is required by the 31$^{st}$ March 2027 and 31$^{st}$ March 2029, respectively, as per the agreed BLRF2 grant funding milestones.

16. The appointment of Watson, who have a strong track record of delivery of mixed tenure residential led developments across Greater Manchester, will enable the realisation of much needed new, sustainable homes and accommodation, across a range of tenures and typologies, at Pyramid Park and Q-Park, and in line with the council's brownfield first approach to housing.

17. The disposal of Pyramid Park and Q-Park will generate a capital receipt for the council, and will also reduce the revenue costs of holding, maintaining and securing these long-term vacant, town centre opportunity sites, which in their

current state, are detrimental to the street scene and regularly attract anti-social behaviour.

**Alternative options considered and rejected**

18. *Do nothing:* If no action is taken to bring forward the Pyramid Park and Q-Park sites for residential, the comprehensive regeneration of this strategic town centre area, in line with the council's vision and masterplan, will not take place and the sites will remain vacant and likely subject to further anti-social behaviour and physical deterioration. The opportunity cost of not facilitating development at these sites will be a significant setback to the council's wider town centre regeneration ambitions. Furthermore, by failing to realise the development of Pyramid Park in the short-term, it is highly likely that the BLRF2 Grant Funding Agreement (GFA) delivery milestones, namely the requirement to have completed disposal by 31st March 2027 and have delivered the new homes by 31st March 2029, would become unachievable. This risks a full grant claw back of the £1.73 million brownfield funding provided by One Public Estate (OPE) and would also jeopardise the anticipated capital receipt that would be yielded from the disposal of the sites. If this BLRF2 grant clawback was to materialise, Pyramid Park would continue to remain a significantly unviable and potentially void site for years, if not decades, as it cannot be brought forward without public sector intervention to address technical site constraints and abnormals.

Failure to realise development at Pyramid Park and Q-Park would also erode confidence in the council's ability to bring forward these two key strategic, brownfield priority sites, which is critical in supporting the delivery of a number of major corporate strategies including the Bury Housing Strategy, the Bury Economic Strategy, and the Bury Town Centre Masterplan. The proposed future residential scheme across both sites holds potential in delivering a significant element of the identified housing shortfall and would help a range of cohorts to live independently in a sustainable location, thus improving outcomes, and complementing wider town centre regeneration activity. These beneficial outcomes would be forfeited by not facilitating development at the sites.

It would also affect the forthcoming redevelopment of Bury Interchange, which will see the construction of a new pedestrian footbridge, spanning the tram lines across from Pyramid Park to Townside at Knowsley Place. This is because the ongoing, grant-funded, remediation scheme at Pyramid Park (planning ref: 70903) has several interlinked planning conditions with the Transport for Greater Manchester (TfGM) interchange southern access works (ref: 71834). The realisation of the wider economic, social and environmental benefits that the future residential scheme would bring, including the generation of new council tax revenue, would also be put at risk.

19. *Dispose of the sites on the open market:* Although this route is likely to ensure the swift disposal of both sites, generate a capital receipt, and free the council of any liabilities tied to the ownership of both plots, the council would be placed in a precarious position as it requires the prospective developer to be able to bring forward housing delivery at Pyramid Park as per the BLRF2 GFA milestones, as outlined earlier. There would be a material risk that the prospective developer, appointed through this open market sale route, could 'land-bank' and not undertake any meaningful development, or realise a residential scheme in line with the council's wider regeneration and strategic vision, with no guarantee to the council on delivery or quality of the scheme.

    Moreover, if the current procurement process, which commenced in April 2026, was to be terminated at this stage and a new open market disposal process initiated, it again would increase the likelihood of the Pyramid Park GFA milestones becoming unachievable due to the sheer amount of time it would take, thereby risking the full grant claw back. Further internal staff resource would also be required, and additional fees would be incurred through the council's external consultant team, needed to support the new procurement, marketing and sale process.

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**Background**

**Pyramid Park**

20. At its meeting on 15th March 2023, Cabinet authorised the disposal of the long-term disused, council-owned, Pyramid Park brownfield site and approved the pursuance of external grant funding to remediate and de-risk the site. This approval was required in order to apply for BLRF2 programme, evidencing to the funder (OPE) that the site was surplus to the council's requirements and was designated for future residential use, thereby increasing the chances of a successful capital grant funding bid award.

21. In October 2023, the council was notified by the government of its successful BLRF2 grant funding award for Pyramid Park, totalling £1.73 million, to support planning and technical design work, land remediation and associated

enabling works needed to create a suitable platform for future residential development, at what is currently an unviable, constrained and long-term, vacant site.

22. Pyramid Park is a 7.4-acre (3 hectare) council-owned, disused brownfield site, situated off Market Street (B6218), to the south of Angouleme Way (A58), in a prominent location on the edge of Bury town centre. The Pyramid Park site is enclosed by major transport infrastructure, with the Metrolink tram line spanning the western boundary, and East Lancashire Railway bordering the southern perimeter. The Market Street arched road bridge also passes through the easterly part of the site at a raised level.

23. The site formerly housed the Knowsley Street railway station and associated goods yard, which originally operated as part of Lancashire and Yorkshire Railways (L&YR).

24. Following the closure of the railway line and station by British Rail in 1970, the site was reclaimed and remodelled as ‘Townside Fields’ during the 1970s for use as an informal public open space. In recent years however, owing to low usage and issues with anti-social behaviour, exacerbated due poor visibility within and across the site, and the lack of an at-grade access from the surrounding area, it was decided to decommission this informal urban parkland in circa 2010.

25. Today, the current condition of the site is poor; it has become overgrown with vegetation, is strewn with litter and debris and continues to attract anti-social behaviour.

**Q-Park**

26. The council-owned, Q-Park site on Knowsley Street, currently comprises of a vacant 1-acre fenced plot at ground level, and a three-storey, 404-space, basement car park. Similar to Pyramid Park, Q-Park is largely bounded by transport infrastructure, with the Metrolink line spanning the eastern boundary and the East Lancashire Railway extending along the southern perimeter.

27. Back in 2008, as part of phase one of the Townside development scheme between the council and Ask Developments, which saw the construction of the Townside Primary Care Centre, 3 and 6 Knowsley Place, and the 115-room, Premier Inn hotel, a new three-storey, undercroft car park structure was also built to serve the adjacent mixed-use development and wider town centre parking demand. This multi-storey car park is currently on a long lease agreement to Q-Park Ltd, who have managed and operated the car park since it opened.

28. The three-storey Q-Park structure was designed and structurally loaded to accommodate the future construction and weighting of an additional six-storey

residential structure atop the completed slab level and columns. This has been indicatively validated by structural engineers through an assessment of original building records and to the council's preferred masterplan for the site, however exact methods of construction to withstand the proposed apartment scheme will be undertaken by the incoming developer. Phase two of the original Townside development scheme had intended for a large apartment building to be erected atop Q-Park (circa 2009-10), however, this scheme was never brought forward due to the prolonged economic and viability challenges in the years following the recession. Like Pyramid Park, the site has remained undeveloped since the undercroft Q-Park structure was completed, and the appearance of the enclosed slab level plot is detrimental to the wider streetscape, especially given its prominent location opposite Bury Town Hall.

**Regeneration Vision**

29. Pyramid Park and Q-Park have both long been identified as key strategic regeneration opportunity, gateway sites, especially given their sustainable town-centre locations, adjacent to Bury Interchange, Bury College, and Bury Town Hall, and being only a short walk away from town centre amenities, such as Bury Market and its new food and events hall, Casewell's, the Mill Gate Shopping Centre, and The Rock.

30. Both sites are designated within the 'Zone H – Southern Gateway' area in the Bury Town Centre Masterplan (2022) and as suited for high quality, high density residential development to meet a range of needs, including family housing, apartments, extra care / specialist accommodation and housing for older people. The principle of residential development is also strongly supported by the planning policy framework (e.g., PfE, Bury UDP and the Bury Local Plan) and given further weight due the accessible town centre situation and brownfield status of both sites.

31. The realisation of residential development at Pyramid Park and Q-Park is a key objective for the council, aligning with ambitious plans to deliver new, affordable and sustainable homes across the borough, whilst supporting town centre regeneration, economic growth and place making objectives.

32. The first stage of the £85m redevelopment of Bury Interchange, immediately adjacent to both sites, will see new access improvements delivered by TfGM to the existing Metrolink platforms and the installation of a new pedestrian footbridge, spanning the tram lines across from Pyramid Park to Townside at Knowsley Place, which incorporates the Q-Park site.

33. This new Metrolink footbridge will serve as a second, permanent and step-free access route into Bury Interchange and enable permeability from Q-Park, across and through to the Pyramid Park residential site and beyond, thereby improving pedestrian access to and from both sites to local amenities, services and attractions. Construction of the new footbridge and platform

improvement works are due to commence in autumn 2026, lasting through until early 2028, before the main redevelopment work at the interchange begins.

34. It should also be noted that a non-definitive Public Right of Way (PRoW) exists through the Pyramid Park site from Town Fields Close, which in consultation with the council's PRoW officer, has been temporarily closed until the remediation scheme works are fully completed in late-2026. The incoming developer will be required to uphold this PRoW, incorporating this right of access into the future residential scheme layout.

35. In accordance with section 123 (2A) of the Local Government Act 1972, a Public Open Space (POS) notice informing of the council's intention to dispose of the Pyramid Park site, was issued and advertised during 2023 as per the council's statutory protocols.

36. As part of the council's vision for Bury 2030, we are working collaboratively with our communities across the borough to achieve faster growth and reducing levels of deprivation as compared to the national average. Our 'Let's Do It!' strategy focuses on building a better future for our children and young people, promoting inclusion, improving our environment, and delivering improvements in prosperity and quality of life.

37. With this in mind, some residential provision at Pyramid Park will be made for care leavers, reflecting the council's commitment to early planning, prioritised access to housing and the delivery of high-quality accommodation for this cohort. The council's approach to redevelopment, with a strong focus on creating modern apartment accommodation for care leavers, has recently received recognition as best practice from the Local Government Association.

38. Additionally, in order to attract young families to Bury and enhance play provision in the town centre, the Pyramid Park residential scheme will accommodate recreation, opportunities for outdoor play, with a strong public realm woven into the scheme designs alongside landscaped areas with seating to encourage dwell time. This responds to stakeholder feedback received from Bury College, located next to the site, who have an interest given that, in the future, students will navigate through Pyramid Park across to Bury Interchange via the new Metrolink footbridge. The forthcoming development will also celebrate and enhance the ecology of the area, with new structures designed with nesting bricks to encourage and foster bird wildlife in the area.

39. In May 2026, the council also launched its Extra Care Housing Strategy 2026-36, which has a target of delivering accommodation across five key site areas over the next ten years. The future residential scheme at Q-Park will enable the council to deliver one site in an area deemed highly suitable, with its

sustainable location and proximity to NHS services provided at Townside Primary Care Centre, as well as other local amenities, to those who have additional supported housing needs.

40. Over the emerging Local Plan period 2022-2043 and based on local housing need calculations, it is a statutory target, in line with PfE, for the borough to deliver of an average of 450 new dwellings per annum.

41. The comprehensive redevelopment and regeneration of Pyramid Park and Q-Park aligns fully with the council's Bury 2030 vision, which highlights the need to deliver more, high-quality, low-carbon and affordable homes across the borough, and as part of our 'Building houses that are homes' strategic ambition.

42. A detailed concept masterplanning study for the Pyramid Park and Q-Park sites has been undertaken by the council's external urban designers. This established the framework and principles for a planning compliant, future residential scheme and mix of units across a range of tenures at Pyramid Park and Q-Park. Proposed unit numbers are circa 140 and circa 80 at the respective sites, however exact numbers will of course be verified through the future planning application submitted by the successful developer. This may also be affected by the changes to building regulations following the Grenfell Fire in 2017, with the Building Safety Act 2022 mandating that new, seven-storey structures, or those over 18 metres, undergo an enhanced regulatory assurance process during the design and construction phase.

43. These development principles which have emerged from the masterplan, have shaped the direction of the future residential scheme which will blend modern apartments and family townhouses with a provision of extra-care, dementia, later living, and care leaver accommodation, all delivered to a high standard of design, character and access, and ultimately fostering a new cohesive community identity a cross both sites.

44. Following approval of the appointment of Conlon to undertake land remediation and de-risking works at Pyramid Park approved by Cabinet in July 2026, and to dovetail the completion of these works with the requirement to dispose of the site to a developer by 31st March 2027, this report seeks approval to dispose of Pyramid Park and Q-Park and appoint and enter in contract with Watson to realise housing delivery at both sites.

**Procurement Process**

45. In order to ensure housing delivery is made at pace, and to tie this in with the completion of the remediation works, the council launched a robust Competitive Flexible Procedure via the Find a Tender service back in April 2026, in accordance with the Procurement Act 2023 (which supersedes the Public Contracts Regulations 2015), to identify and select a suitable

development partner who would be able to deliver the residential scheme at Pyramid Park and Q-Park.

46. Due to the value and complexity of the envisaged scheme, it was decided that a full tender exercise would be necessary as this would allow the track record, suitability and proposals of prospective bidders to be fully evaluated.

| **Table 1 – Stages of the Competitive Flexible Procedure** |
|---|
| Stage 1 – Conditions of Participation<br>• Bidders assessed on exclusion grounds, financial standing, legal compliance, technical ability, deliverability, and social value |
| Stage 2 – Invitation to Tender<br>• Shortlisted suppliers submit initial tenders<br>• Successful bidders are selected with only small number of bidders remaining in the process |
| Stage 3 – Dialogue & Final Tenders<br>• Competitive dialogue process with remaining bidders<br>• Final tenders submitted by bidders |
| Stage 4 – Contract Award<br>• Best scoring final tender selected, subject to council approvals and standstill period |

47. Given the extensive requirements of the council across the two sites, including the preferred housing mix, specification and design quality, various infrastructure works and access requirements, a bespoke four-stage flexible CFP procedure was initiated. The stages of this CFP process are outlined in table 1 above.

48. Important conditions and the council’s extensive requirements were understood, discussed and addressed by prospective suppliers through the CFP process. The award criteria that were set, which covered measures of quality, social value, and price, included:

- How tenderers would secure and maintain high standards of design quality and public realm, including the methods, and key considerations that would shape their approach.
- How development would be delivered at both sites, with the constraints, access rights, and / or easements of the operational Q-Park car park, existing Market Street bridge structure, East Lancashire Railway, TfGM interchange works, Metrolink operations and access requirements, and Bury College construction health and safety requirements in mind.
- How risks and issues would be mitigated, given the need to undertake complex highway infrastructure, geotechnical / foundational and utility work, and considering extant planning consents (incl. the requirement to secure Biodiversity Net Gain uplift).

- How bidders would ensure the development is delivered to the council’s required timescales, including outlining programme, planning, highways, site constraints, procurement, risk management and any key assumptions underpinning delivery.
- How prospective suppliers would work with the council and their chosen registered provider to deliver extra care housing, a specialist dementia unit, sheltered accommodation and care leaver units, whilst ensuring key design standards are achieved (e.g., building to Nationally Described Space Standards (NDSS), M4(2), M4(3) accessibility requirements and to HAPPI design principles).
- How bidders would incorporate the council and its partners’ social value priorities (incl. working with Bury Council and Bury College to maximise worklessness, education and skills outcomes).
- How tenderers would realise a scheme that delivers maximum land value across both sites and evidencing this with a corresponding appraisal.

49. Four eligible bids were received at Stage 1 – Conditions of Participation, however only three tenderers met the minimum scoring thresholds to be able to proceed to stage two. Following two rounds of dialogue with the shortlisted bidders and the invitation to submit a tender, only two final tenders were received.

50. Thorough evaluation of the two bids was undertaken and a moderation session held to collectively agree the scores and the agreed rationale for the moderated scores, based on a 65% quality and 35% price scoring measure. Following the conclusion of the competitive dialogue process and the selection of the best scoring final tender, Watson were ranked first and therefore identified as the council’s preferred bidder for the disposal and delivery of housing development at the Pyramid Park and Q-Park sites.

51. A full list of bidders, award criteria, and the outcome of the evaluation process breakdown of the scoring process can be found in the Evaluation section in Part B of this report.

52. It is likely the future residential planning application will require additional ecological enhancements to be delivered through both on and off-site compensation measures, in line with Biodiversity Net Gain (BNG) legislation requirements. These may have commercial implications which are outlined in Part B and will be determined through the planning process.

53. It should be noted that the eventual land offer is likely to be impacted by Section 106 contributions obligated through the planning approval process. In view of the latter and the strict BLRF2 grant funding delivery timeframes affecting the Pyramid Park site, it is recommended that the final approval of

the disposal and eventual capital receipt is delegated to the Executive Director of Place and Executive Director of Finance.

54. Under Section 123 of the Local Government Act 1972, local authorities must not sell or dispose of land for less than the "best consideration reasonably obtainable" unless they have specific consent or qualify under general disposal exceptions for local community well-being.

**Red Book Valuation**

55. In order to ensure compliance with this legislation, the council has undertaken independent RICS red book valuations on both sites. The outcome of the valuation exercise can be found in Part B of this report.

56. The airspace above Q-Park has remained unoccupied since it was constructed and given that physical connectivity is being improved between both sites, strengthened by the new TfGM pedestrian bridge, consultation with developers and registered providers has determined that the two sites could be jointly developed together as part of a single scheme.

57. It should be noted that an existing long-term lease exists between the council and the car park operator, Q-Park Ltd, so the developer will need to work with the council and occupying tenant (who will remain in occupation throughout the development process) to facilitate below slab level construction works such as drainage.

58. It is understood that there are six leases affecting the site, including three apparent occupational leases. Given the wider leasehold structure, a title review will be undertaken as soon as possible and anything of note including the extent of third-party interests will be included as conditions in the aforementioned heads of terms to ensure any implications are fully understood and navigated ahead of the proposed development.

59. It is expected a service charge for Q-Park will be payable covering maintenance arrangements where applicable and this will be captured in a long lease arrangement with Watson. Given the intention is for the leasehold interest to transfer to a Registered Provider, any maintenance arrangements will be dealt with by assignment of the lease/transfer of the registered leasehold title (or a direct grant to the Registered Provider), subject to the lease terms and any required consents. This will be captured in the heads of terms.

**Construction Programme and Stakeholder Management**

60. The Pyramid Park enabling and land remediation main works are currently in progress following approval from Cabinet at its meeting on 8th July 2026. The duration of the works programme is around 15-weeks, with enabling and site preparatory works beginning first, followed by the main remediation works

which will progress from west to east across the site, concluding with demobilisation and handover works in autumn 2026. This will also allow the linked planning conditions to be discharged and enable progression of the TfGM interchange southern access scheme works, which subject to TfGM internal approvals, is due to commence in late-autumn 2026.

61. Through this period, Watson will be progressing with the planning application for the residential scheme, targeting approval in 2027 and a start on site later that year (subject to planning timeframes and approvals).

62. The sequencing and programme of the future residential scheme construction works will be informed by site conditions and technical constraints but will be aimed to be delivered as efficiently as possible. The council's comprehensive health and safety requirements, given the both sites proximity to Bury College and through ongoing engagement with college estates staff, will also been embedded within Watson's construction logistics methodology plan in due course.

63. The council and Watson will ensure that the future residential works align with TfGM's ongoing redevelopment works at Bury Interchange. A partnership approach with TfGM and Bury Council was endorsed in 2023 during the initial BLRF2 funding bid stage, via a Memorandum of Understanding (MoU). This MoU has facilitated ongoing collaboration between both schemes, to date, ensuring that:

- The scope, programme, sequencing and phasing of the ongoing remediation works at Pyramid Park, and future housing development are effective and align optimally with TfGM's redevelopment plans and construction programme at Bury Interchange.
- Any site constraints are shared and reviewed between parties in order to enable continued scheme deliverability.
- The planning, design and access requirements between both schemes are mutually baselined and agreed upon, (e.g., the new Metrolink pedestrian footbridge which lands directly in the Pyramid Park site).
- The future residential scheme construction works are carefully planned and coordinated with TfGM to guarantee unhindered access for Metrolink servicing vehicles which use the existing Pyramid Park spur road.
- Effective construction management, engaging closely with Bury College and Bury Highways team to ensure optimal safety in and around the Market Street junction at key times.

64. There will be ongoing, regular communications and engagement between the council's project team, Watson and TfGM, as the residential scheme plans progress

**Social Value**

65. Watson have committed to delivering a comprehensive programme of social value initiatives aligned with the council's priorities and the aspirations of Bury College. These commitments extend beyond the physical delivery of the development and are designed to maximise long-term social, economic and environmental benefits for local residents, college students and communities.

66. Working in partnership with Bury Council, Bury College, local businesses and the wider community, Watsons will implement a project-specific social value plan focused on skills development, education, employment opportunities, work experience and community engagement. A dedicated social value manager will oversee delivery, monitoring and reporting of these commitments throughout the project lifecycle.

67. Key commitments include establishing a formal partnership with Bury College to support curriculum co-design, helping to ensure that learners develop the technical skills, behaviours and industry knowledge required for future employment within the construction and housing sectors. Watson have committed to providing practical support, industry engagement and learning opportunities to strengthen links between education and employment.

68. The social value package also includes engaging with the council led, GMCA Economic Inactivity Trailblazer programme to offer a range of on-site construction related targeted interventions to support local employment and skills outcomes, creating opportunities for residents to access training, work experience and careers within the construction industry. These initiatives are intended to deliver lasting benefits beyond the completion of the residential development and support the council's wider objectives around inclusive growth, economic opportunity and community wellbeing, and in line with the council's social value strategy.

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**Links with the Corporate Priorities:**

69. The Pyramid Park and Q-Park residential works support the delivery of the Bury 'Let's Do It!' strategy and the four Bury 2030 principles that underpin it:

**Local Neighbourhoods:** The delivery of housing at Pyramid Park and Q-Park will support the local neighbourhoods strategy by enabling residential development at these core town centre, sustainable brownfield sites. A new, mixed intergenerational town centre community will be fostered at Pyramid Park and Q-Park through the forthcoming development, which will deliver a mix of new affordable and sustainable homes, whilst also supporting the council's wider objectives for regeneration, economic growth and place making. This new neighbourhood will deliver new, high-quality residential serving a range of needs, with family housing, apartments, extra care / specialist accommodation and housing for older people planned at the site.

**An Enterprising Spirit:** Our spirit of enterprise and innovation will be harnessed through the forthcoming residential scheme, which will transform what are currently unviable, constrained and dilapidated town centre sites, into a new, inter-generational residential neighbourhood. The scheme will support development and good growth, through investment in new housing and supporting physical infrastructure. A new pedestrian route will be facilitated through from the town centre across to Bury Interchange, which is currently undergoing an £85m overhaul to deliver a modern and integrated transport facility. The council continue to work closely with TfGM's project team, who are overseeing the redevelopment of the interchange, in order to maximise outcomes for both schemes and for the wider town centre. We will connect local people to new opportunities via the remediation scheme and through the future residential scheme development. Work experience, apprenticeships, placements and skills enhancement with local education providers, such as Bury College, will be realised.

**Delivering Together:** The remediation scheme and future residential development will foster a new community on the fringe of Bury town centre, fostering new relationships and connections to grow. The future housing development will deliver new sustainable homes and high-quality public realm, which will support community uses and strengthen connectivity and permeability to existing communities at Town Fields Close and across east Bury. The council and Watson will continue to engage and update key stakeholders and local residents as the development scheme progresses.

**A Strengths-Based Approach:** The council and Watson will value and build on the strengths of our residents and communities by continuing to engage, listen and empower, through the duration of the residential scheme works and via the realisation of social value outcomes. The strengths, successes and expertise of our Bury based business will be harnessed through the extensive use of the local supply chain. The forthcoming residential scheme at Pyramid Park and Q-Park will take an evidence-led approach to intervention, by delivering much needed town centre housing for identified groups, including extra / specialist care accommodation provision.

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**Equality Impact and Considerations:**

70. An initial equality impact screening has been carried out. This showed that there are unlikely to be any equality impacts on people or organisations arising from this activity. Equality impacts will be continually reviewed as the residential development progresses however there are no equalities concerns at this stage.

71. The purpose of this report is to seek approval for the council to dispose of Pyramid Park and Q-Park, appoint and enter into a legal agreement, licence and any other ancillary agreements with Watson for the delivery of housing

development at these sites. The realisation of new housing will help a range of cohorts to live independently in this sustainable town centre location and deliver a significant element of the identified housing shortfall.

72. The robust CFP procurement exercise that has been conducted has been done in accordance with the Procurement Act 2023, which has ensured a fair, open, effective, and transparent process.

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**Environmental Impact and Considerations:**

73. A full planning strategy, which will address the ecological and environmental impacts of the residential scheme will be submitted to the local planning authority for approval in 2027. This strategy will fully consider, evaluate and mitigate the environmental impacts of the proposed residential scheme and construction works, in line with local and national planning policy legislation requirements.

74. The ongoing remediation scheme will help unlock and bring a disused brownfield site forward for high-quality, sustainable residential development. Noting the interface between the ongoing, planned approved, remediation works at Pyramid Park, and the future residential scheme development, a phased, joint approach to biodiversity and ecology matters at the site has been agreed with the local planning authority (LPA) and the Greater Manchester Ecology Unit (GMEU). This approach ensures that through the remediation works at Pyramid Park, and considering the future residential scheme across both sites, that a 10% BNG uplift and a sufficient provision for the long-term management of these improved habitats will be secured.

75. The habitat characteristics that define the Townside Grade B SBI, which covers part of the Pyramid Park site area, will be enhanced both through the on-site reprovision and enhancement, but also through some off-site BNG gain measures. This approach has been agreed following extensive consultation with the LPA and GMEU. Some off-site biodiversity gain is required as it would not be possible to deliver the full BNG uplift entirely on-site without significantly compromising the developable space and viability of the future Pyramid Park residential scheme. A number of unique species that could not be re-provided within the Pyramid Park site area, including some mixed scrub, lowland meadows and fens, have already been augmented and improved elsewhere, at a habitat bank located nearby within the Manchester Pennine Fringe National Character Area and managed by a trusted national provider of off-site biodiversity areas.

76. The forthcoming residential scheme at Pyramid Park and Q-Park will be low and net zero carbon by design, with sustainability and carbon reduction fundamental to the proposals. Proposed measures include new energy and water efficient buildings to minimise carbon in operation, the use of sustainable building materials to reduce upfront embodied carbon, photovoltaic panels and air source heat pumps. Nesting bricks on the side elevations of buildings and in shaded areas will encourage wildlife and provide bird nesting opportunities. Reflecting the location of both sites and the accessibility to public transport, the future residential scheme is expected to adopt a parking-light approach, with car parking provision at a level that is just sufficient for the needs of the development and considering the sustainable town centre location.

**Assessment and Mitigation of Risk:**

| **Risk / opportunity** | **Mitigation** |
|---|---|
| Reputational risk – erosion of confidence in the ability of the council to successfully deliver the remediation works scheme and facilitate the disposal of Pyramid Park by the agreed GFA deadline of 31st March 2027, thereby enabling the delivery of the residential scheme.<br><br>Failure to dispose of the site and appoint a developer in a timely manner would jeopardise the BLRF2 GFA delivery milestones. This risks the claw back of the £1.73 million grant and would also jeopardise the anticipated capital receipt. | An expert and experienced project delivery team with effective project management and governance structures. External contract management support.<br><br>Appropriate contingency provision and risk management strategy.<br><br>The procurement of Conlon under a PCR compliant framework (via the North West Construction Hub). |
| Permissions risk – delay in discharging pre-commencement planning conditions that impact the start on site and wider construction programme | Watson have a strong track record and extensive experience of navigating the planning process. Watson have an in-house planning consultant appointed to lead all aspects of the future planning application. |
| Delivery risk – site conditions, including unforeseen conditions resulting in cost increases. | Conlon are delivering a full land remediation strategy and associated preparatory enabling works at Pyramid Park which have de-risked the site and prepared it for residential development. At Q-Park, structural engineers have confirmed that the existing structure can accommodate the future construction and weighting of an additional six-storey residential building. |

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|---|---|
| | Further site investigations and due diligence will be undertaken by Watson and appropriate cost planning and contractor engagement undertaken, if/when required during the residential scheme construction. |
| Delivery risk – build cost inflation / commercial viability of contracting organisation. | Watson have robust contractual arrangement and effective contractor management through regular meetings and contract retentions. A parent company guarantee will be sought from Watson Construction (Holdings) Ltd to mitigate risk of insolvency. |
| Delivery risk – supplier risk i.e. availability of specialist sub-contractors. | Watson have demonstrated full capability of managing their sub-contractors and supply chain via a multi-disciplinary arrangement. |
| Financial risk – increase in costs during construction | Watson are aware of the likely Section 106 contribution and have appraised the scheme appropriately. The land offer has been subject to due diligence and an evaluation of the development appraisal and cost plan undertaken.<br><br>Appropriate contingency provision sums to cover inflation, risk, asbestos etc.<br><br>Early contractor / supply chain involvement by Watson to ensure a robust cost plan is in place that will be regularly monitored throughout the contract, including contingencies to cover unforeseen works, rise in inflation etc.<br><br>Effective financial monitoring / management systems will be in place. |

**Procurement Implications:**

77. Procurement undertaken in accordance with the Competitive Flexible Procedure under the Procurement Act 2023. Bidders have been informed of the recommendation to award to Watson Construction Ltd pending cabinet approval.

78. Whilst the evaluation process has concluded, and Watson Construction Ltd is the recommended bidder. The Authority's decision to award remains subject to Cabinet approval.

79. Should Cabinet approve the recommendation, a Contract Award Notice under section 50 of the Act will be published. Upon its publication, a standstill period of eight working days will commence.

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**Legal Implications:**

80. The Council has undertaken a Competitive Flexible Procedure in accordance with the Procurement Act 2023 to identify a development partner for the Pyramid Park and Q-Park sites. Subject to Cabinet approval, the Council must ensure that the appointment and subsequent contractual arrangements are completed in accordance with the procurement process that has been undertaken, the Council’s Constitution, and all relevant statutory requirements.

81. Failure to dispose of the site to a developer in a timely manner may jeopardise the drawdown and retention of BLRF2 funding and the achievement of GFA delivery milestones.

82. In progressing the scheme, the Council is exercising its broad powers to promote economic development, regeneration and housing delivery, including through the Localism Act 2011 and section 111 of the Local Government Act 1972. The proposals align with wider strategic objectives to bring forward brownfield land and deliver mixed, inter-generational housing. In doing so, the Council must continue to comply with its statutory duties, including the best value duty under section 123 of the Local Government Act 1972, equality obligations under the Equality Act 2010, and any applicable subsidy control and procurement requirements. Robust governance and decision-making arrangements are essential to mitigate legal, financial and reputational risk.

83. The Q-Park site is subject to existing leasehold interests. It will be necessary to undertake a detailed title review and consider the effect of existing leases, occupational interests, easements, rights of access and other third-party rights before any disposal structure is finalised. These interests may affect the nature, timing and implementation of the proposed development.

**Financial Implications:**

84. A RICS red book valuation of the sites has been undertaken. This valuation has been used to benchmark the offers upon concluding the procurement process.

85. The existing contracted remediation work is to be fully funded from the grants received (and approved previously in March 2023 and July 2026) and there are no revenue implications resulting from this.

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**Appendices:**

None.

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**Background papers:**

- March 2023 Cabinet Paper ((https://councildecisions.bury.gov.uk/documents/s34600/Proposed%20Disposal%20of%20Pyramid%20Park.pdf)
- July 2026 Cabinet Paper *Agenda for Cabinet on Wednesday, 8th July, 2026, 6.00 pm - Bury Council*

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

| Term | Meaning |
|---|---|
| Biodiversity Net Gain (BNG) | To ensure new development has a measurably positive impact ('net gain') on biodiversity, compared to what was there before development, schemes must deliver a BNG uplift of 10%. BNG became mandatory in February 2024 under Schedule 7A of the Town and Country Planning Act 1990 (as inserted by Schedule 14 of the Environment Act 2021). |
| Brownfield Land Release Fund (BLRF2) | The BLRF2 programme has provided up to £60m in capital funding to enable local authorities across the country to release council-owned sites on brownfield land for housing development.<br><br>BLRF2 enables councils to take a brownfield-first approach to development by unlocking otherwise unviable brownfield sites for new homes, whilst supporting regeneration, economic growth and place making.<br><br>The programme is funded and supported by the Ministry of Housing, Communities and Local |

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|---|---|
| | Government (MHCLG); and delivered by One Public Estate (OPE). |
| Bury Unitary Development Plan (UDP) | The Bury Unitary Development Plan (UDP) was adopted by the Council on 29th August 1997 and acts as a guide for the future development or protection of land in the borough and together with other adopted Development Plan Documents its policies and proposals form the basis for the Council's decisions on planning applications.<br>The Council is now working to replace the adopted UDP with a new document called the Bury Local Plan. Until the new Local Plan is produced the UDP will continue be used to make planning decisions. |
| Competitive Flexible Procedure (CFP) | A competitive flexible procedure (CFP) is a new way for the public sector to run a procurement through competition. Introduced through the Procurement Act 2023, it is designed to give contracting authorities more opportunity and choice in how goods and services are purchased. The CFP consolidates the various tendering processes available under the previous procurement regulations into a single adjustable system. Unlike other procedures which follow set stages and timelines, there is no fixed template for the CFP process allowing a bespoke single or multi-stage procurement procedure to maximise outcomes. |
| Grant Funding Agreement (GFA) | A legally binding contract that outlines the terms under which a funder provides grant funding to a recipient and responsibilities of the grant recipient in meeting those terms. |
| Greater Manchester Ecology Unit (GMEU) | The GMEU provides specialist advice to, and on behalf of, the ten district councils that make up Greater Manchester Combined Authority on biodiversity, nature conservation and wildlife issues. |
| Joint Contracts Tribunal (JCT) | The Joint Contracts Tribunal is the UK’s leading provider of building contracts. A JCT contract is a standard form agreement which provides clear, legally tested terms for construction works. These contracts allocate responsibilities, risks, and payment obligations between the employer (client) and the contractor. They streamline project delivery by using recognisable clauses that cover design, procurement, quality standards, and dispute resolution. |

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| One Public Estate (OPE) | One Public Estate is a partnership between the Office of Government Property (OGP) in the Cabinet Office (CO), the Local Government Association (LGA), and MHCLG. Their aim is to bring public sector bodies together in place in order to create better places; to use public assets more efficiently; to create service and financial efficiencies; and to release land for development to create new homes and provide jobs for communities. |
| Places for Everyone (PfE) | Places for Everyone (PfE) is the joint statutory development plan for nine Greater Manchester authorities (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford and Wigan) for jobs, new homes and sustainable growth.<br><br>It sets out where we will build the new homes we need, where our businesses will locate to sustain and create jobs for our people, what infrastructure is needed to support the development and to protect and enhance our towns, cities and landscapes. It covers a timeframe up to 2039. |
| Public Open Space (POS) Notice | Public Open Space (POS). A public open space notice is a formal legal announcement used by a local council to state its intent to sell, lease, or change the use of protected community land like parks or recreation grounds. It ensures transparency by alerting citizens so they can raise objections. |
| Public Rights of Way (PRoW) | Public Rights of Way are public highways protected in law. They include footpaths, bridleways, restricted byways and byways used for travel, exercise and leisure. |

# Agenda Item 9

Bury Council

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

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| --- | --- | --- |
| **Report to:** | Cabinet | **Date:** 09 September 2026 |
| **Subject:** | Annual Complaints Performance and Learning Report 2025/26 and self-assessment against the Housing Ombudsman Complaint Handling Code | |
| **Report of** | Cabinet Member for Housing Services | |

## Summary


1. The Housing Ombudsman Service (HOS) Complaint Handling Code requires social landlords to produce an annual complaints performance and service improvement report for scrutiny and challenge.

2. The report includes:

   - the annual self-assessment against the Complaints Handling Code
   - a qualitative and quantitative analysis of performance
   - any findings of non-compliance with the complaint handling code by the HOS
   - the service improvements made as a result of the learning from complaints.
   - annual report from the HOS on the landlord’s performance
   - Any other relevant reports or publications produced by the HOS in relation to the work of the landlord

3. The council is also required as part of the Complaint Handling Code to publish and submit to the HOS the Annual Complaints Performance and Learning Report and the annual self-assessment against the Complaint Handling Code.

4. This report presents, for approval, the Council's Annual Complaints Performance and Learning Report for 2025/26 together with the self-assessment against Complaints Handling Code that forms part of the annual submission.

5. There is an expectation of the HOS and the Complaints Handling Code that the self-assessment and the annual report is signed off by the governing body of the organisation, which in this case is Cabinet.


## Recommendation(s)

6. a) Note and approve the Annual Complaints Performance and Learning Report 2025/26 for publication and submission to the HOS.

   b) Approve the self-assessment against the Complaints Handling Code for submission to the HOS and publication.

   c) Note the learning, service improvements and actions identified to further strengthen complaint handling performance and compliance with the Complaints Handling Code.

**Reasons for recommendation(s)**

7. The HOS Complaints Handling Code requires landlords to undertake an annual self-assessment of compliance and publish both the assessment and an annual complaints performance and learning report. Consideration by Cabinet demonstrates appropriate oversight, transparency and accountability, whilst supporting the Council's commitment to learning from complaints, improving services and delivering positive outcomes for tenants and leaseholders.

**Alternative options considered and rejected**

8. The publication of an annual self-assessment and complaints performance and learning report is a requirement of the HOS Complaints Handling Code. Failure to do so would reduce transparency and could result in non-compliance with the Complaints Handling Code and HOS expectations.

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**Report Author and Contact Details:**

*Name: Sian Grant*
*Position: Director of Housing*
*Department: Bury Housing Services*
*E-mail: sian.grant@bury.gov.uk*

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**Background**

9. The HOS Complaints Handling Code sets out the requirements landlords must meet to ensure complaints are handled fairly, consistently and effectively. The Complaints Handling Code requires landlords to publish an Annual Complaints Performance and Learning Report that demonstrates how complaints are used to drive service improvement. As part of this report landlords are required to undertake a self-assessment against the Complaints Handling Code.

**Annual self assessment**

10. The Council has completed its annual self-assessment against the requirements of the Complaints Handling Code. The findings are that the

council is fully compliant with the Complaints Handling Code. The self-assessment is attached at Appendix 1.

11. The annual self-assessment has been reviewed and signed off by the Cabinet Member for Housing Service in her function as the "Member Responsible for Complaints (MRC)". (The HOS Complaints Handling Code requires social landlords to appoint an MRC to meet the Complaints Handling Code's scrutiny and governance arrangements).

**Annual Complaints Performance and Learning Report**

12. The Annual Complaints Performance and Learning Report for 2025/26 is attached at Appendix 2. This has been reviewed by the Cabinet Member for Housing Service in her function as the 'Member Responsible for Complaints (MRC)" and Housing Advisory Board at its meeting on 28th July 2026.

13. The tenant's Complaint Review group has also been involved in reviewing complaint performance and learning. We have incorporated feedback received from tenants into the Annual Complaints Performance and Learning Report and tenant feedback has helped shape improvement priorities focused on communication, policy compliance and demonstrating learning from complaints. This reflects the Council's commitment to working in partnership with tenants to improve complaint handling and service delivery.

14. The report provides an overview of complaints handling performance between 1st April 2025 and 31st March 2026. The report covers complaints received, performance against complaint handling timescales, outcomes achieved for residents, HOS determinations received during the year, and the learning and service improvements implemented as a result of complaints.

15. During 2025/26 we received 188 Stage 1 complaints. This is a significant increase from 62 complaints received in 2024/25 and shows the work we have undertaken in the last year to improve our complaint handling culture. 188 complaints equates to 25.66 complaints per 1,000 homes.

16. We resolved 72% of complaints at stage 1. This is an improvement on the pervious year were we resolved 50% of complaints at stage one and reflects improvements in our complaint handling and in our understanding of tenants complaints. We upheld or partially upheld 48% of stage 1 complaints. This is an improvement on 2024/25 when were upheld 61% of complaints.

17. Of the 189 complaints, 52 (28%) were escalated to stage 2 review. The main reasons for this were complainants stating they were unhappy with the response received at stage 1 or because the actions promised at stage 1 were not completed. 54% of Stage 2 complaints were fully or partially upheld. This is an improvement from 62% in the previous year.

18. The services that received the most complaints were the repairs service receiving 66 complaints (34%), neighbourhoods that received 50 complaints (27%), followed by assets that received 30 complaints (16%).

19. The top three stated reasons for complaints during 2025/16 were:

- Failure to follow policy – 33 complaints (17%)
- Delays in taking action – 31 complaints (16%)
- Poor communication and customer service – 25 complaints (14%)

20. During 2025/26, the HOS made 8 determinations on complaints relating to Bury Council Housing Services which included 21 findings. This included 14 findings of severe maladministration (2 findings), maladministration or service failure and 7 findings of no maladministration or reasonable redress This means that we had a 66.7% maladministration rate. The national average is 74%.

21. 4 of the 8 maladministration determinations related to Anti-social behaviour services. Due to this we carried out a review of all the Anti-social behaviour complaints and HOS decisions to identify whether there were any systemic failings in our approach to Anti-social behaviour or common themes for improvement. The review found the need to improve consistency, communication and case management. The outcome of the review mirrored the findings found in the Housemark review of Anti-social behaviour services carried out earlier in the year. In response, we have strengthened oversight, of anti-social behaviour case management, improved performance monitoring, introduced regular case reviews, and created new specialist anti-social behaviour roles. These changes will help ensure tenants concerns are dealt with more effectively, learning is acted upon more quickly, and tenants receive a more consistent service.

22. We track tenant satisfaction with the complaint handling in two ways. The first is using the Tenants Satisfaction Measures. This is an annual surrey sent to all tenants on the anniversary of their tenancy start date which asks a number of mandated satisfaction questions including satisfaction with complaint handling. The second is through a complaints transactional survey undertaken after a complaint is closed.

23. The complaints transactional survey records a higher satisfaction with complaint handling at 58% compared to 38% satisfaction with complaint handling through the Tenant Satisfaction Measure. The difference in satisfaction is explained through the difference in timing of the surveys with the transaction survey being carried out after the complaint is closed. This is a fairly standard difference across different housing providers. Analysis of dissatisfaction with complaint handling shows a link between a complaint not being upheld and a tenant being dissatisfied.

24. The Tenant Complaints Review Group has reviewed complaint performance information and identified the issues they believe should be prioritised during 2026/27. These are;
    - Improving communication and customer service
    - Reducing delays and resolving issues faster
    - Services tenants can rely on

25. These priorities are being taken forward in our service improvement plans for this year.

**Governing body statement and approval**

26. The Leader of the Council has reviewed the Report and provided a supporting draft Governing Body Statement which is attached at Appendix 3.

27. Cabinet ("governing body") approval is required under the HOS Complaint Handling Code and is essential to ensure the approved documents can be published and submitted to the HOS by the statutory deadline of 30 September 2026.

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**Links with the Corporate Priorities:**

29. This report supports the Let's Do It! Strategy by promoting openness, accountability and continuous improvement across housing services. Effective complaint handling ensures residents' voices are heard, services are responsive to customer needs and learning is used to improve service delivery. The report contributes to the Council's ambition to work with residents, build trust and confidence in public services, improve customer experience, and ensure that services are designed around the needs of communities.

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**Equality Impact and Considerations:**

30. An Equality Impact Assessment (EIA) has been considered in relation to this report. Effective complaint handling supports equitable access to services and provides all residents with the opportunity to raise concerns and seek resolution where service standards have not been met. The Council's complaints process is available through a range of accessible channels and reasonable adjustments can be provided where required. There are no adverse equality impacts arising directly from this report. The continued monitoring of complaint themes supports the identification of any disproportionate impacts on protected groups, including Looked After Children where relevant.

**Environmental Impact and Considerations:**

31 There are no significant environmental impacts arising directly from the recommendations contained within this report. The continued use of digital systems for complaint recording, monitoring and reporting supports the Council's commitment to reducing paper use and promoting efficient service delivery.

**Assessment and Mitigation of Risk:**

| Risk / opportunity | Mitigation |
| --- | --- |
| Failure to comply with the Housing Ombudsman Complaint Handling Code. | Annual self-assessment, governance oversight and ongoing monitoring of compliance requirements. Complaint Housemark Improvement Plan |

**Procurement Implications:**

*Not applicable*

**Legal Implications:**

The HOS CHC became a statutory requirement from 1 April 2024 under the *Social Housing (Regulation) Act 2023*. It requires all landlords within the HOS jurisdiction to assess their compliance with the CHC annually. Bury Council falls under this jurisdiction. Landlords must complete a formal self-assessment against every provision of the CHC, obtain review and approval from their governing body (for Bury this is Cabinet) and reassess compliance whenever there are significant organisational changes affecting complaint handling. The completed self-assessment must be published and any areas of non-compliance, together with proposed remedial actions and timescales, must be clearly identified.

The CHC also requires landlords to produce an annual Complaints Performance and Service Improvement Report (often referred to as a “complaints and learning report”). This report must be considered by the “governing body” (Bury Council Cabinet in this instance), published on the landlord's website alongside the governing body's response, and explain complaint-handling performance, lessons learned from complaints, and resulting service improvements. As part of the annual compliance process, landlords must submit to the HOS links to their complaints policy, published self-assessment, annual report, and governing body's response. Failure to comply may lead to regulatory intervention, including the issue of a Complaint Handling Failure Notice by the HOS.

The Appendices to this Report form Housing Services proposed Bury Council submissions to HOS and for publication in compliance with HOS CHC. The form and nature of the submissions in the Appendices are compliant with HOS CHC. The Director of Housing Services is accountable for the factual content of the documents.

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**Financial Implications:**

*There are no financial implications*

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**Appendices:**

**Appendix 1** The Complaint Self – assessment 2025/26

**Appendix 2** Annual Complaint Performance and Learning report

**Appendix 3** – Governing body statement 2026

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**Background papers:**

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

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

| Term | Meaning |
|---|---|
| HOS | Housing Ombudsman |
| ASB | Anti - Social Behaviour |

## Appendix A: Self-assessment form

This self-assessment form should be completed by the complaints officer and it must be reviewed and approved by the landlord's governing body at least annually.

Once approved, landlords must publish the self-assessment as part of the annual complaints performance and service improvement report on their website. The governing body's response to the report must be published alongside this.

Landlords are required to complete the self-assessment in full and support all statements with evidence, with additional commentary as necessary.

We recognise that there may be a small number of circumstances where landlords are unable to meet the requirements, for example, if they do not have a website. In these circumstances, we expect landlords to deliver the intentions of the Code in an alternative way, for example by publishing information in a public area so that it is easily accessible.

**"I have taken the time to review this self-assessment and the supporting evidence, and I am reassured by the progress Housing Services has made in strengthening how complaints are handled. It is clear that complaints are not simply viewed as problems to be resolved, but as opportunities to learn, improve services and build trust with our tenants.**
**I am particularly encouraged by the work that has been undertaken to make the complaints process more accessible, improve oversight, and ensure that lessons learned from complaints lead to meaningful changes for residents. The improvements in complaint recording, customer satisfaction, and governance show a real commitment to transparency and continuous improvement.**
**As Cabinet Member for Housing Services and the Member Responsible for Complaints, I understand the importance of listening to tenants' experiences and ensuring their voices help shape our services. I will continue to work closely with officers to provide challenge, support, and oversight, ensuring we maintain high standards and remain focused on delivering better outcomes for residents.**
**While there is always more we can do, I am satisfied that Housing Services has a positive approach to complaint handling and a genuine commitment to learning from feedback. I am pleased to endorse this self-assessment and the continued work being undertaken to improve services for our tenants."**

| Director of Housing | Cabinet member for Housing Services and Complaint Champion |
|---|---|
| Sian Grant<br><br>**Signed Sian Grant Date: 12/8/2026** | **Signed Cllr Ayesha Arif, Date: 28/07/2026** |

## Section 1: Definition of a complaint

| Code provision | Code requirement | Comply: Yes / No | Evidence | Commentary / explanation |
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| 1.2 | A complaint must be defined as:<br>*'an expression of dissatisfaction, however made, about the standard of service, actions or lack of action by the landlord, its own staff, or those acting on its behalf, affecting a resident or group of residents.'* | Y | Complaints Policy | This is defined in the Complaints Policy within section 4 |
| 1.3 | A resident does not have to use the word 'complaint' for it to be treated as such. Whenever a resident expresses dissatisfaction landlords must give them the choice to make complaint. A complaint that is submitted via a third party or representative must be handled in line with the landlord's complaints policy. | Y | Complaints Policy | A complaint is recognised as any expression of dissatisfaction, without needing the word "complaint," in line with the Code. This is referenced in Section 4 of the policy.<br><br>This is supported by:<br>• Staff and Contact Centre training to identify dissatisfaction and offer complaints/escalation<br>• Multiple access routes (dedicated mailbox, online forms, third-party submissions) |

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| | | | | • Daily monitoring of tenant enquiries via Teams<br>• Clear processes and templates in supporting documentation<br><br>Overall, systems and training ensure all dissatisfaction is identified and handled in line with the complaints policy. |
| 1.4 | Landlords must recognise the difference between a service request and a complaint. This must be set out in their complaints policy. A service request is a request from a resident to the landlord requiring action to be taken to put something right. Service requests are not complaints, but must be recorded, monitored and reviewed regularly. | Y | Complaints Policy<br><br>Making a complaint - Bury Council | This is set out within the Housing Services Complaints Handling Policy - Section 5<br><br>It is also made clear on our Complaints overview online |
| 1.5 | A complaint must be raised when the resident expresses dissatisfaction with the response to their service request, even if the handling of the service request remains ongoing. Landlords must not stop their efforts to address the service request if the resident complains. | Y | Complaints Policy<br><br>Stage1 Complaint Process Map_.docx | This is set out within the Housing Services Complaints Handling Policy - Section 5<br><br>Tenants receive a courtesy call from the Complaint Teams to clarify the reasons for dissatisfaction, find a resolution and / or log a formal complaint |

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| 1.6 | An expression of dissatisfaction with services made through a survey is not defined as a complaint, though wherever possible, the person completing the survey should be made aware of how they can pursue a complaint if they wish to. Where landlords ask for wider feedback about their services, they also must provide details of how residents can complain. | Y | [Process Mapping - TSM.doc](Process Mapping - TSM.doc) | Survey feedback is not automatically treated as a complaint, but tenants are clearly signposted on how to raise one.<br><br>• The TSM survey directs tenants to the complaints process via a link to the factsheet and website<br>• Transactional survey and TSM dissatisfaction is escalated to managers, who contact tenants to resolve issues and log a complaint or service request where appropriate<br><br>These measures ensure tenants can easily escalate concerns if they wish. |

## Section 2: Exclusions

| Code provision | Code requirement | Comply: Yes / No | Evidence | Commentary / explanation |
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| 2.1 | Landlords must accept a complaint unless there is a valid reason not to do so. If landlords decide not to accept a complaint, they must be able to evidence their reasoning. Each complaint must be considered on its own merits | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | Complaints are accepted unless there is a clear and evidenced reason not to, with each case considered on its own merits.<br><br>• Refusals are managed in line with Section 14 Fair Exclusions of the Complaints Policy.<br>• Decisions not to accept a complaint are documented and evidenced<br>• Standardised Stage 1 and Stage 2 refusal templates ensure consistency and transparency |
| 2.2 | A complaints policy must set out the circumstances in which a matter will not be considered as a complaint or escalated, and these circumstances must be fair and reasonable to residents. Acceptable exclusions include: | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | The policy sets out the circumstances in which a matter will not be considered as a complaint this is set out within section 14 Fair Exclusions of the Complaints Policy.<br><br>Decisions not to accept a complaint are documented and evidenced Standardised Stage 1 and Stage 2 refusal templates ensure consistency and transparency |

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| | 1.1 The issue giving rise to the complaint occurred over twelve months ago.<br>1.2 Legal proceedings have started. This is defined as details of the claim, such as the Claim Form and Particulars of Claim, having been filed at court.<br>1.3 Matters that have previously been considered under the complaints policy. | | | |
| 2.3 | Landlords must accept complaints referred to them within 12 months of the issue occurring or the resident becoming aware of the issue, unless they are excluded on other grounds. Landlords must consider whether to apply discretion to accept complaints made outside this time limit where there are good reasons to do so. | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx<br><br>Making a complaint - Bury Council | This is set out within the complaints policy section 13 Timeframes and Discretion<br><br>Information on our timeframes and discretion is also available on our website. |
| 2.4 | If a landlord decides not to accept a complaint, an explanation must be provided to the resident setting out the reasons why the matter is not suitable for the complaints | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is set out within the complaints policy Section 14 Fair Exclusions.<br><br>Information on this is contained in our refusal letter |

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| | process and the right to take that decision to the Ombudsman. If the Ombudsman does not agree that the exclusion has been fairly applied, the Ombudsman may tell the landlord to take on the complaint. | | | |
| 2.5 | Landlords must not take a blanket approach to excluding complaints; they must consider the individual circumstances of each complaint. | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is set out within the complaints policy Section 13 Timeframes and Discretion and Section 14 Fair Exclusions.<br>Information on this is contained in our refusal letter |

## Section 3: Accessibility and Awareness

| Code provision | Code requirement | Comply: Yes / No | Evidence | Commentary / explanation |
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| 3.1 | Landlords must make it easy for residents to complain by providing different channels through which they can make a complaint. Landlords must consider their duties under the Equality Act 2010 and anticipate the needs and reasonable adjustments of residents who may need to access the complaints process. | Y | Complaints Policy<br><br>Making a complaint - Bury Council<br><br>NBPO0005 Reasonable Adjustments Policy | This is set out within the complaints policy Section 7 How to make a complaint<br><br>Targeted messages and new tenancy sign up messages are sent to tenants informing them how to complain.<br><br>Other improvements we have made include:<br><br>Dedicated inbox to triage complaints<br>Reoccurring article in every tenant newsletter<br>QR code online along with all methods of making a complaint<br>• HOS – Bilingual video on making a complaint is also on our webpage.<br><br>Our Reasonable Adjustments Policy helps ensure all tenants can access the complaints process. Where a tenant has a disability, health condition, communication need, or other vulnerability, we will consider appropriate adjustments so they |

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| | | | | can make and engage with the complaint process on an equal basis. This is supported by our Equality Impact Assessment and action plan. |
| 3.2 | Residents must be able to raise their complaints in any way and with any member of staff. All staff must be aware of the complaints process and be able to pass details of the complaint to the appropriate person within the landlord. | Y | Complaints Policy | This is set out within the complaints policy Section 7. How to Make a Complaint<br><br>Tenants can raise complaints through any channel and with any staff member, who are trained to recognise and refer them appropriately.<br>This is supported by:<br>• Mandatory training for all staff (including new starters and annual refreshers)<br>• Ongoing staff engagement and awareness sessions<br>• Improved tracking of referral routes via our CRM, showing increased staff-led complaints<br>• A focus on early resolution<br><br>Work is in progress to align Councillor enquiries with the complaints process, and all complaints are logged appropriately. |
| 3.3 | High volumes of complaints must not be seen as a negative, as they can be indicative of a well-publicised | Y | Our Performance - Bury Council | • Management Tasks have been phased out to ensure all complaints are formally captured, regardless of how they are received |

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| | and accessible complaints process. Low complaint volumes are potentially a sign that residents are unable to complain. | | | • Our current complaint rate is 28 per 1,000 properties, which sits within an appropriate and expected range and is much improved on last year's underreporting.<br>• Stage 2 escalations have increased in line with higher Stage 1 volumes; however, the escalation rate has improved, reducing from 54% to 30%<br>• Year-end performance shows increased tenant confidence in raising complaints, alongside improved satisfaction levels<br>• TSM complaint satisfaction has improved to 48%<br>• Day-to-day complaint satisfaction is currently 60%, indicating stronger handling of operational complaints |
| 3.4 | Landlords must make their complaint policy available in a clear and accessible format for all residents. This will detail the two stage process, what will happen at each stage, and the timeframes for responding. The policy must also be published on the landlord's website. | | Making a complaint - Bury Council<br><br>Complaints Policy | See Sections 7 to 11 of the complaints policy<br><br>Working with the Tenant's Complaints Review Group, we reviewed our Complaints Factsheet and introduced a simplified route to complain.<br><br>Accessibility and Routes to Complain Working with the Complaints Review Group, we reviewed our Complaints online |

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| | | | | overview and introduced a simplified route to complain.<br>Accessibility has been further enhanced through:<br>• A QR code linking directly to complaints information and online access<br>• Hard copies of the policy are available at the Town Hall reception and on request. |
| 3.5 | The policy must explain how the landlord will publicise details of the complaints policy, including information about the Ombudsman and this Code. | Y | Complaints Policy | Set out in the complaints policy 7. How to Make a Complaint<br><br>In addition, new tenants are made aware of the policy at the start of the tenancy and in targeted annual messages from there on. |
| 3.6 | Landlords must give residents the opportunity to have a representative deal with their complaint on their behalf, and to be represented or accompanied at any meeting with the landlord. | Y | Making a complaint - Bury Council<br><br>Complaints Policy | See section 7. We outline that a representative can make a complaint on a tenant's behalf.<br><br>This is also published online. |
| 3.7 | Landlords must provide residents with information on their right to access the Ombudsman service and how the individual can | Y | Making a complaint - Bury Council<br><br>Complaints Policy | See section 12 – Within the Complaints Policy there is a specific section on escalation to the Housing Ombudsman Service which provides the tenant with information on their rights to escalate to the Ombudsman |

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| | engage with the Ombudsman about their complaint. | | | All acknowledgement, response letters and all extensions refer to the Housing Ombudsman, we also promote Housing Ombudsman bilingual videos. |

## Section 4: Complaint Handling Staff

| Code provision | Code requirement | Comply: Yes / No | Evidence | Commentary / explanation |
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| 4.1 | Landlords must have a person or team assigned to take responsibility for complaint handling, including liaison with the Ombudsman and ensuring complaints are reported to the governing body (or equivalent). This Code will refer to that person or team as the 'complaints officer'. This role may be in addition to other duties. | Y | | We have a dedicated Complaints Team (1 x manager and 2 investigator officers) responsible for overseeing complaint handling across Housing Services, including:<br>• Investigating Stage 1 complaints<br>• Managing escalation of Stage 2 complaints<br>• Ensuring compliance with the Housing Ombudsman Complaint Handling Code<br>A Complaints Manager leads this function and acts as the key liaison with the Housing Ombudsman Service (HOS).<br>The Complaints Team works closely with service managers to support investigations and ensure subject matter expertise is applied.<br>We also deliver regular and annual training to managers, setting clear expectations and ensuring complaints are handled consistently in line with the Code. |
| 4.2 | The complaints officer must have access to staff at all levels to facilitate the prompt | Y | | The Complaints Team operates at management level, with full access to systems, records, and staff across the |

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| | resolution of complaints. They must also have the authority and autonomy to act to resolve disputes promptly and fairly. | | | organisation, including call data via the Contact Centre.<br><br>They are supported by a Senior Leadership Team member, ensuring any barriers are resolved quickly and giving them the authority and autonomy to investigate and resolve complaints promptly and fairly. |
| 4.3 | Landlords are expected to prioritise complaint handling and a culture of learning from complaints. All relevant staff must be suitably trained in the importance of complaint handling. It is important that complaints are seen as a core service and must be resourced to handle complaints effectively | Y | Cabinet Reports - Annual Complaints Performance and Service Improvement Report 202425 (6).pdf - All Documents | Complaints are treated as a core service, supported by an expanded Complaints Team to ensure capacity and alignment with the Complaint Handling Code.<br>All complaints are risk assessed on receipt, considering vulnerabilities and potential hazards.<br>We promote a strong culture of learning, supported by:<br>• An annual Complaint Performance and Learning Report<br>• Quarterly reporting to the Housing Advisory Board (HAB)<br>• Regular reporting through quarterly managers' meetings<br>• Ongoing tracking of learning and improvement actions<br>Staff receive mandatory complaint handling training, with refreshers or targeted training where required.<br>Action in progress |

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| | | | | • Further strengthening visibility of learning through operational management forums<br>• Delivery against the HouseMark accreditation recommendations<br>• Upgrade of the CRM Housing Management System that will provide more detailed and automated reporting |

## Section 5: The Complaint Handling Process

| Code provision | Code requirement | Comply: Yes / No | Evidence | Commentary / explanation |
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| 5.1 | Landlords must have a single policy in place for dealing with complaints covered by this Code. Residents must not be treated differently if they complain. | Y | Complaints Policy | We have a single policy in place for dealing with complaints.<br><br>Within the policy it outlines that tenants will not be treated any differently for making a complaint. This is outlined in Section 4 What is a Complaint. |
| 5.2 | The early and local resolution of issues between landlords and residents is key to effective complaint handling. It is not appropriate to have extra named stages (such as 'stage 0' or 'informal | Y | Complaints Policy | There is no informal complaint stage |

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| | complaint') as this causes unnecessary confusion. | | | |
| 5.3 | A process with more than two stages is not acceptable under any circumstances as this will make the complaint process unduly long and delay access to the Ombudsman. | Y | Complaints Policy | We operate a 2-stage process. |
| 5.4 | Where a landlord's complaint response is handled by a third party (e.g. a contractor or independent adjudicator) at any stage, it must form part of the two stage complaints process set out in this Code. Residents must not be expected to go through two complaints processes. | Y | Complaints Policy | All complaints, including contractors complaints are handled by Bury Council Housing Services. Contractors are made aware of this.<br><br>This is outlined in Section 4 of the complaints policy |
| 5.5 | Landlords are responsible for ensuring that any third parties handle complaints in line with the Code. | Y | Complaints Policy | All complaints are handled by dedicated Complaints Team following the Complaints Policy |
| 5.6 | When a complaint is logged at Stage 1 or escalated to Stage 2, landlords must set out their understanding of the complaint and the outcomes | Y | Complaints Policy | See Sections 10 and11 of the Complaints Policy – stage one and two investigating complaints |

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| | the resident is seeking. The Code will refer to this as "the complaint definition". If any aspect of the complaint is unclear, the resident must be asked for clarification. | | STANDARD Template Stage 1 & 2 Complaint Response NEW template for managers.docx | It is outlined in our acknowledgement letters and response templates |
| 5.7 | When a complaint is acknowledged at either stage, landlords must be clear which aspects of the complaint they are, and are not, responsible for and clarify any areas where this is not clear. | Y | Complaints Policy<br><br>STANDARD Template Stage 1 & 2 Complaint Response NEW template for managers.docx | See Sections 10 and11 of the Complaints Policy – stage one and two investigating complaints<br><br>It is outlined in our acknowledgement letters and response templates |
| 5.8 | At each stage of the complaints process, complaint handlers must:<br>a. deal with complaints on their merits, act independently, and have an open mind;<br>b. give the resident a fair chance to set out their position;<br>c. take measures to address any actual or perceived conflict of interest; and<br>d. consider all relevant information and evidence carefully. | Y | Complaints Policy<br><br>STANDARD Template Stage 1 & 2 Complaint Response NEW template for managers.docx<br><br>New Complaint Helpsheet sheet for Stage 1 and 2 for manager-head of service May 2026.docx<br><br>Cabinet Reports - Stage 2 Complaint Toolkit for managers | See Sections 10 and11 of the Complaints Policy – stage one and two investigating complaints<br><br>It is outlined in our acknowledgement letters and response templates<br><br>Stage 1 and Stage 2 follow a service led investigation. A checklist and toolkit have been devised to ensure we are adhering to policy and service standards including timescales as a main reference to resolve issues and treat tenants fairly based on evidence. |

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| | | | - UPDATED 27.11.23.pdf - All Documents | |
| 5.9 | Where a response to a complaint will fall outside the timescales set out in this Code, the landlord must agree with the resident suitable intervals for keeping them informed about their complaint. | Y | Complaint Extension template.docx<br><br>Complaints Policy | This is outlined within the complaints policy Section 10 and 11 – Stage 1 and 2 complaints<br><br>We have an extension template which includes HOS referral and updates. This normally relates to a complex complaint or a specialist investigation where a report is produced. |
| 5.10 | Landlords must make reasonable adjustments for residents where appropriate under the Equality Act 2010. Landlords must keep a record of any reasonable adjustments agreed, as well as a record of any disabilities a resident has disclosed. Any agreed reasonable adjustments must be kept under active review. | Y | Complaints Policy<br><br>NBPO0005 Reasonable Adjustments Policy | This is outlined in section 7 of the Complaints Policy How to make a complaint<br><br>We also have a Reasonable Adjustment Policy. All reasonable adjustments are logged on our housing management system and our regularly reviewed. They are updated on several touch points, including Tenancy visits, annual data cleansing, and first point of contact. |
| 5.11 | Landlords must not refuse to escalate a complaint through all stages of the complaints procedure unless it has valid | Y | Complaints Policy | This is outlined in our complaints policy in Section 11 Stage 2 Review |

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| | reasons to do so. Landlords must clearly set out these reasons, and they must comply with the provisions set out in section 2 of this Code. | | | |
| 5.12 | A full record must be kept of the complaint, and the outcomes at each stage. This must include the original complaint and the date received, all correspondence with the resident, correspondence with other parties, and any relevant supporting documentation such as reports or surveys. | Y | Complaints Policy | All complaints have case management folders created and filed by stage and year accessible to the Complaints Team, Contact Centre, Business Managers, and Head of Service.<br><br>All complaints, outcomes, and learning are recorded on our housing management system.<br><br>Referenced in the complaints policy in Section 19 Complaint Recording and Record Keeping |
| 5.13 | Landlords must have processes in place to ensure a complaint can be remedied at any stage of its complaints process. Landlords must ensure appropriate remedies can be provided at any stage of the complaints process without the need for escalation. | Y | Complaints Policy<br><br>Stage1 Complaint Process Map_.docx<br><br>Stage2 Complaint Process Map.docx | This is outlined in the Section 6 and 9 of the complaints policy – Early Resolution and Putting things Right (Remedies)<br><br>The Complaints Team is tasked to provide a quick resolution where possible. The role is to risk assess complaints, considering tenant vulnerability, health, and safety concerns to determine the urgency of the issues raised. This can be evidenced in several complaint decisions where remedies have |

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| | | | | been actioned before the compliant respo nse has been sent and as part of a follow-up conversation.<br><br>This is set out in our complaints process |
| 5.14 | Landlords must have policies and procedures in place for managing unacceptable behaviour from residents and/or their representatives. Landlords must be able to evidence reasons for putting any restrictions in place and must keep restrictions under regular review. | Y | Complaints Policy | This is outlined in section 14 Fair Access and Acceptable Behaviour of the complaints policy<br><br>We have a Zero-tolerance procedure to manage unacceptable behaviour.<br><br>Managing unacceptable behaviour is referenced in our letters that go out to tenants. |
| 5.15 | Any restrictions placed on contact due to unacceptable behaviour must be proportionate and demonstrate regard for the provisions of the Equality Act 2010. | Y | Complaints Policy | Our commitment to this is outlined in the Complaints Policy Section 14 and 18 Fair Access and Acceptable Behaviour. |

## Section 6: Complaints Stages

Stage 1

| Code provision | Code requirement | Comply: Yes / No | Evidence | Commentary / explanation |
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| 6.1 | Landlords must have processes in place to consider which complaints can be responded to as early as possible, and which require further investigation. Landlords must consider factors such as the complexity of the complaint and whether the resident is vulnerable or at risk. Most stage 1 complaints can be resolved promptly, and an explanation, apology or resolution provided to the resident. | Y | Complaints Policy<br><br>Stage1 Complaint Process Map_.docx<br><br>Stage2 Complaint Process Map.docx | This is outlined in our complaints policy in Section 6 – Early Resolutions and Section 10 – Stage one – Investigating complaints.<br><br>We adopt a risk-based approach to our investigations and responses. T<br><br>We have process maps in place to ensure complaints are assessed promptly, enabling straightforward cases to be resolved quickly while more complex or high-risk cases are identified early for further investigation |
| 6.2 | Complaints must be acknowledged, defined and logged at stage 1 of the complaints procedure **within five working days of the complaint being received**. | Y | Complaints Policy | This is outlined in section 10 of the complaints policy |

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| 6.3 | Landlords must issue a full response to stage 1 complaints **within 10 working days** of the complaint being acknowledged. | | Complaints Policy | This is outlined in section 10 of the complaints policy – Response Timing and Actions |
| 6.4 | Landlords must decide whether an extension to this timescale is needed when considering the complexity of the complaint and then inform the resident of the expected timescale for response. Any extension must be no more than 10 working days without good reason, and the reason(s) must be clearly explained to the resident. | Y | Complaints Policy<br><br>Complaint Extension template.docx | This is outlined in our his is outlined in our complaints policy section 10 - Extensions (Stage 1)<br><br>We use a standard letter template to confirm any agreed extensions with the tenant, clearly outlining the reasons for the extension. |
| 6.5 | When an organisation informs a resident about an extension to these timescales, they must be provided with the contact details of the Ombudsman. | Y | Complaints Policy<br><br>Complaint Extension template.docx | We provide the tenant with the housing ombudsman details within the letter that we send.<br><br>This is outlined in the complaints policy section 10 - Extensions (Stage 1) |
| 6.6 | A complaint response must be provided to the resident when the answer to the complaint is known, not when the outstanding actions | Y | Complaints Policy | Complaints are responded to once the outcome is known<br>Each complaint will list the next steps, agreed timescales and single point of contact. |

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| | required to address the issue are completed. Outstanding actions must still be tracked and actioned promptly with appropriate updates provided to the resident. | | | This is outlined in section 9 of the complaints policy – Response Timing and Actions<br><br>This is outlined in the service lead response template letters. |
| 6.7 | Landlords must address all points raised in the complaint definition and provide clear reasons for any decisions, referencing the relevant policy, law and good practice where appropriate. | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is outlined in Section 10 of the complaints policy – Response Timing and Actions<br><br>We have standard response letters to ensure all points are addressed that are raised in the complaint. |
| 6.8 | Where residents raise additional complaints during the investigation, these must be incorporated into the stage 1 response if they are related and the stage 1 response has not been issued. Where the stage 1 response has been issued, the new issues are unrelated to the issues already being investigated or it would unreasonably delay the response, the new issues | Y | Complaints Policy | Issue relevant to the complaint may be added whilst before a response is due. This may result in an extension to investigate the added issues. We will notify the tenant.<br><br>When the additional complaints are not related or the response has been issued, we will log and investigate a new complaint. This is outlined in the complaints policy Section 10 Additional Issues Raised During Investigation |

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| | must be logged as a new complaint. | | | |
| 6.9 | Landlords must confirm the following in writing to the resident at the completion of stage 1 in clear, plain language:<br>a. the complaint stage;<br>b. the complaint definition;<br>c. the decision on the complaint;<br>d. the reasons for any decisions made;<br>e. the details of any remedy offered to put things right;<br>f. details of any outstanding actions; and<br>g. details of how to escalate the matter to stage 2 if the individual is not satisfied with the response. | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is outlined in the complaints policy Section 10 Response Timing Actions<br><br>The Stage 1 letter template is formatted to ensure all required information is clearly provided to the tenant, including the complaint definition, decision, reasons, remedies, and escalation details |

Stage 2

| Code provision | Code requirement | Comply: Yes / No | Evidence | Commentary / explanation |
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| 6.10 | If all or part of the complaint is not resolved to the resident's satisfaction at stage 1, it must be progressed to stage 2 of the landlord's procedure. Stage 2 is the landlord's final response. | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is outlined in Section 10 and 11 of the complaint policy<br><br>Tenants are provided with this information within the Stage 1 template with the response or agreed actions |
| 6.11 | Requests for stage 2 must be acknowledged, defined and logged at stage 2 of the complaints procedure within five working days of the escalation request being received. | Y | Complaints Policy | This is outlined in Section 11 of the complaint policy – Stage 2 |
| 6.12 | Residents must not be required to explain their reasons for requesting a stage 2 consideration. Landlords are expected to make reasonable efforts to understand why a resident remains unhappy as part of its stage 2 response. | Y | Complaints Policy | This is outlined in Section 11 of the complaint policy – Stage 2 |
| 6.13 | The person considering the complaint at stage 2 must not be the same person that considered the complaint at stage 1. | Y | Complaints Policy | This is outlined in Section 11 of the complaint policy – Stage 2 |
| 6.14 | Landlords must issue a final response to the stage 2 **within 20 working days** of | Y | Complaints Policy | This is outlined in Section 11 of the complaint policy – Stage 2 |

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| | the complaint being acknowledged. | | | |
| 6.15 | Landlords must decide whether an extension to this timescale is needed when considering the complexity of the complaint and then inform the resident of the expected timescale for response. Any extension must be no more than 20 working days without good reason, and the reason(s) must be clearly explained to the resident. | Y | [Complaints Policy]() | This is outlined in Section 11 of the complaint policy – Stage 2 |
| 6.16 | When an organisation informs a resident about an extension to these timescales, they must be provided with the contact details of the Ombudsman. | Y | Complaints Policy<br><br>Template Stage 1 & 2<br>Complaint Response refusal template.docx | This is outlined in Section 11 of the complaint policy – Stage 2 Extension<br><br>This is outlined in our response letter |
| 6.17 | A complaint response must be provided to the resident when the answer to the complaint is known, not when the outstanding actions required to address the issue are completed. Outstanding actions must still be tracked and actioned promptly with appropriate | Y | Complaints Policy | This is outlined in Section 11 of the complaint policy – Stage 2 – Response |

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| | updates provided to the resident. | | | |
| 6.18 | Landlords must address all points raised in the complaint definition and provide clear reasons for any decisions, referencing the relevant policy, law and good practice where appropriate. | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is outlined in Section 11 of the complaint policy – Stage 2 – Response<br><br>This is outlined in our response letter |
| 6.19 | Landlords must confirm the following in writing to the resident at the completion of stage 2 in clear, plain language:<br>a. the complaint stage;<br>b. the complaint definition;<br>c. the decision on the complaint;<br>d. the reasons for any decisions made;<br>e. the details of any remedy offered to put things right;<br>f. details of any outstanding actions; and<br>g. details of how to escalate the matter to the Ombudsman Service if the individual remains dissatisfied. | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is outlined in Section 11 of the complaint policy – Stage 2 – Response<br><br>This is outlined in our response letter |

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| 6.20 | Stage 2 is the landlord's final response and must involve all suitable staff members needed to issue such a response. | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is outlined in section 11 of the complaint policy – Stage 2 – Response<br><br>This is outlined in our response letter |

## Section 7: Putting things right

| Code provision | Code requirement | Comply: Yes / No | Evidence | Commentary / explanation |
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| 7.1 | Where something has gone wrong a landlord must acknowledge this and set out the actions it has already taken, or intends to take, to put things right. These can include:<br>• Apologising;<br>• Acknowledging where things have gone wrong;<br>• Providing an explanation, assistance or reasons;<br>• Taking action if there has been delay;<br>• Reconsidering or changing a decision; | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is outlined in Section 11 of the complaint policy – Stage 2 – Response and section 8 Putting things Right (Remedies)<br><br>This is outlined in our response letter |

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| | • Amending a record or adding a correction or addendum;<br>• Providing a financial remedy;<br>• Changing policies, procedures or practices. | | | |
| 7.2 | Any remedy offered must reflect the impact on the resident as a result of any fault identified. | Y | Complaints Policy | This is outlined in Section 9 - Putting things Right (Remedies) |
| 7.3 | The remedy offer must clearly set out what will happen and by when, in agreement with the resident where appropriate. Any remedy proposed must be followed through to completion. | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is outlined in Section 9 - Putting things Right (Remedies)<br><br>This is outlined in our response letter |
| 7.4 | Landlords must take account of the guidance issued by the Ombudsman when deciding on appropriate remedies. | Y | Complaints Policy<br><br>Template Stage 1 & 2 Complaint Response refusal template.docx | This is outlined in Section 9 - Putting things Right (Remedies)<br><br>This is outlined in our response letter |

## Section 8: Self-assessment, reporting and compliance

| Code provision | Code requirement | Comply: Yes / No | Evidence | Commentary / explanation |
|---|---|---|---|---|
| 8.1 | Landlords must produce an annual complaints performance and service improvement report for scrutiny and challenge, which must include:<br>a. the annual self-assessment against this Code to ensure their complaint handling policy remains in line with its requirements.<br>b. a qualitative and quantitative analysis of the landlord's complaint handling performance. This must also include a summary of the types of complaints the landlord has refused to accept;<br>c. any findings of non-compliance with this Code by the Ombudsman;<br>d. the service improvements made as a result of the learning from complaints; | Y | Cabinet Reports - Annual Complaints Performance and Service Improvement Report 202425 (6).pdf - All Documents<br><br>Performance and Learning Report<br><br>Briefing note complaints for lead member - complaints 26-27 as at 31.07.23 - first quarter.docx | Performance monitoring is undertaken throughout the year, supported by annual reporting and regular review.<br><br>Recent assessments by Housing and Internal Audit have provided assurance that we are continuing to improve performance, maintain compliance, and remain on track to achieve excellence within the Complaint Handling Code |

| | | | | |
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| | e. any annual report about the landlord's performance from the Ombudsman; and<br>f. any other relevant reports or publications produced by the Ombudsman in relation to the work of the landlord. | | | |
| 8.2 | The annual complaints performance and service improvement report must be reported to the landlord's governing body (or equivalent) and published on the on the section of its website relating to complaints. The governing body's response to the report must be published alongside this. | Y | 4.1 Annual Complaints Performance and Service Improvement Report 2025.26 (2) 1.docx<br><br>4.0 Complaints Annual Self Assessment, Draft Performance and Learning report and Draft Complaint Policy.docx | The annual complaints performance and service improvement report is presented to the Housing Advisory Board, Cabinet, and the Council's leadership team to provide oversight of complaints performance, learning, and service improvement activity. The report is also shared with Lead Members through regular briefing arrangements to ensure appropriate scrutiny and governance. |
| 8.3 | Landlords must also carry out a self-assessment following a significant restructure, merger and/or change in procedures. | | N/A | N/A |
| 8.4 | Landlords may be asked to review and update the self- | Y | | We will act and comply with any such request from the Ombudsman. |

| | | | | |
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| | assessment following an Ombudsman investigation. | | | |
| 8.5 | If a landlord is unable to comply with the Code due to exceptional circumstances, such as a cyber incident, they must inform the Ombudsman, provide information to residents who may be affected, and publish this on their website Landlords must provide a timescale for returning to compliance with the Code. | Y | | In the event of exceptional circumstances such a cyber incident, we will inform the Ombudsman and take all necessary action as required. |

## Section 9: Scrutiny & oversight: continuous learning and improvement

| Code provision | Code requirement | Comply: Yes / No | Evidence | Commentary / explanation |
|---|---|---|---|---|
| 9.1 | Landlords must look beyond the circumstances of the individual complaint and consider whether service improvements can be made as a result of any learning from the complaint. | Y | Annual Complaints Performance and Service Improvement Report 202425 (6).pdf<br><br>Briefing note complaints for lead member - complaints 26-27 as at 31.07.23 - first quarter.docx | Learning is considered and evidence individually<br>for each<br>complaint regardless of whether it is upheld or not (e.g. better ways to apply reasonable adjustments).<br>Complaints are reviewed quarterly and Annually, to Understand all learning and identify emerging trends/themes to inform the service improvement plan. |

| | | | | |
|---|---|---|---|---|
| | | | [26-27 Master Performance for CR and Dashboard - updated for CR 12 June.xlsx]() | |
| 9.2 | A positive complaint handling culture is integral to the effectiveness with which landlords resolve disputes. Landlords must use complaints as a source of intelligence to identify issues and introduce positive changes in service delivery. | Y | | In addition to oversight provided by the Leadership Complaints Monitoring Group, managers discuss complaint themes, learning, and tenant feedback with their teams on a quarterly basis to promote ownership of complaints and continuous service improvement.<br>The Complaints Manager also delivers a weekly "Tea, Coffee, Cake and Chat" session, providing informal one-to-one sessions and catch-up opportunities across the service. This initiative has strengthened engagement with frontline staff, encouraged open discussions about complaints and tenant feedback, and helped identify new ways of working. As a result, positive changes have been implemented, including improvements to the identification and delivery of reasonable adjustments, supporting a more inclusive and tenant-focused service. |
| 9.3 | Accountability and transparency are also | Y | | We report on performance on complaints twice a |

| | | | | |
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| | integral to a positive complaint handling culture. Landlords must report back on wider learning and improvements from complaints to stakeholders, such as residents' panels, staff and relevant committees. | | Our Performance - Bury Council<br><br>Briefing note complaints for lead member - complaints 26-27 as at 31.07.23 - first quarter.docx<br><br>4.0 Complaints Annual Self Assessment, Draft Performance and Learning report and Draft Complaint Policy.docx<br><br>Listening to you, improving together - Bury Council<br><br>Cabinet Reports - Annual Complaints Performance and Service Improvement Report 202425 (6).pdf - All Documents | year to our Housing Advisory Board<br>We report complaints performance to Cabinet<br>on an annual basis.<br>The Tenant's Voice Forum has been Reviewing our approach to complaint handling including learning and performance Review Group for complaints inspection documents Website listening to you improving together |
| 9.4 | Landlords must appoint a suitably senior lead person as accountable for their complaint handling. This person must assess any themes or trends to identify potential systemic issues, serious risks, or policies and | Y | | Director of Housing & the Head of Performance, Assurance and Improvement are accountable for complaint handling |

| | | | | |
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| | procedures that require revision. | | | |
| 9.5 | In addition to this a member of the governing body (or equivalent) must be appointed to have lead responsibility for complaints to support a positive complaint handling culture. This person is referred to as the Member Responsible for Complaints ('the MRC'). | Y | | An appointed elected member Cllr receives a monthly briefing as well as regular meetings to have oversight of complaints handling and performance.<br><br>The current MRC is new and will receive induction training and support in their new position.<br>. |
| 9.6 | The MRC will be responsible for ensuring the governing body receives regular information on complaints that provides insight on the landlord's complaint handling performance. This person must have access to suitable information and staff to perform this role and report on their findings. | Y | | The MRC has direct access to the complaints team and is provided with regular updates, and should additional information be required it is provided. |
| 9.7 | As a minimum, the MRC and the governing body (or equivalent) must receive:<br>a. regular updates on the volume, categories and outcomes of complaints, alongside complaint handling performance; | Y | Cabinet Reports - Annual Complaints Performance and Service Improvement Report 202425 (6).pdf - All Documents<br><br>Briefing note complaints for lead member - complaints 26- | Monthly brief update is provided to MRC<br>Monthly update is provided to Corporate Governance Assurance Board<br>Six monthly reports to Housing Advisory Board on complaints<br>Annual report to Cabinet on complaints |

| | | | | |
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| | b. regular reviews of issues and trends arising from complaint handling;<br>c. regular updates on the outcomes of the Ombudsman's investigations and progress made in complying with orders related to severe maladministration findings; and<br>d. annual complaints performance and service improvement report. | | 27 as at 31.07.23 - first quarter.docx<br><br>26-27 Master Performance for CR and Dashboard - updated for CR 12 June.xlsx<br><br>4.0 Complaints Annual Self Assessment, Draft Performance and Learning report and Draft Complaint Policy.docx | |
| 9.8 | Landlords must have a standard objective in relation to complaint handling for all relevant employees or third parties that reflects the need to:<br>a. have a collaborative and co-operative approach towards resolving complaints, working with colleagues across teams and departments;<br>b. take collective responsibility for any shortfalls identified through complaints, rather than blaming others; and<br>c. act within the professional standards for | Y | 26-27 Master Performance for CR and Dashboard - updated for CR 12 June.xlsx | The Complaints Manager meets with Leadership weekly where appropriate to ensure that complaint priorities and themes are<br>understood and supports change and culture across the business and<br>third parties.<br>Standard agenda item on leadership meetings to<br>discuss any issues with complaint handling<br>Action for improvement –<br>add as a standard<br>agenda item to monthly operational managers meetings to discuss collective responsibility and ownership |

| | | | | |
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| | engaging with complaints as set by any relevant professional body. | | | |

Bury Council

# Annual Complaints Performance and Service Improvement Report 2025/26

Bury Council

## Introduction

Tenant and leaseholder feedback, whether through compliments and complaints or other feedback, provides us with valuable understanding about how our tenants and leaseholders experience our services. It helps us to understand what we are doing well, where improvements are needed, and how we can develop services to meet the needs and expectations of our tenants.

This report covers complaints received and managed between 1 April 2025 and 31 March 2026. It includes both qualitative (descriptive) and quantitative (numbers-based) analysis of our complaint-handling performance including complaint volumes, outcomes, timeliness and key themes. The report also highlights the learning identified, the actions taken to improve services, and the feedback received through compliments during the same period. We'll also talk about how we've followed good practice set out in the Complaint Handling Code from the Housing Ombudsman Service, our complaint policy and any changes we've made to our services based on what we've learned during the same period.

## Number of complaints received

Over the reporting period, we received **188** formal complaints, of which **52** were escalated to Stage 2 review. No complaints were refused during this period.

**Stage 1**
**188**

**Stage 2**
**52**

**This means we received 25.66 stage 1 and 7.10 stage 2 complaints for every 1000 homes we manage.**

This performance is only **slightly below** the sector benchmark and represents a significant improvement compared with last year when we received **62 complaints**. This increase in complaint volumes is encouraging, as it suggests that tenants are more aware of their right to complain, feel confident that their concerns will be listened to and are able to access the complaints process more easily. This indicates that our efforts to promote an open and accessible complaint handling culture are having a positive impact, ensuring that tenant concerns are recognised, recorded and used to improve our services. We resolved **72%** of complaints at stage one, which is a significant improvement on the **50%** resolution rate of the previous year.

## Equality, Diversity and Inclusion

We monitor information about tenants and leaseholders who make complaints to help us make sure our complaints process is fair, accessible and works well for everyone. By looking at information such as age, gender, ethnicity, language and disability, we can identify trends, understand the needs of different groups and make improvements where needed. This helps us provide fair and consistent services for all tenants.

If we notice any unexpected trends, we will investigate further to ensure there is fairness in how we treat our tenants.

We currently record and look at the following characteristics in relation to tenants making a complaint: age, gender, ethnicity, primary language and disability.

**23% of the tenant population have told us they have a disability, they account for 52.3% of complaints. Tenants without a disability make up 76.9% of the tenant population but account for 47.6% of complaints**

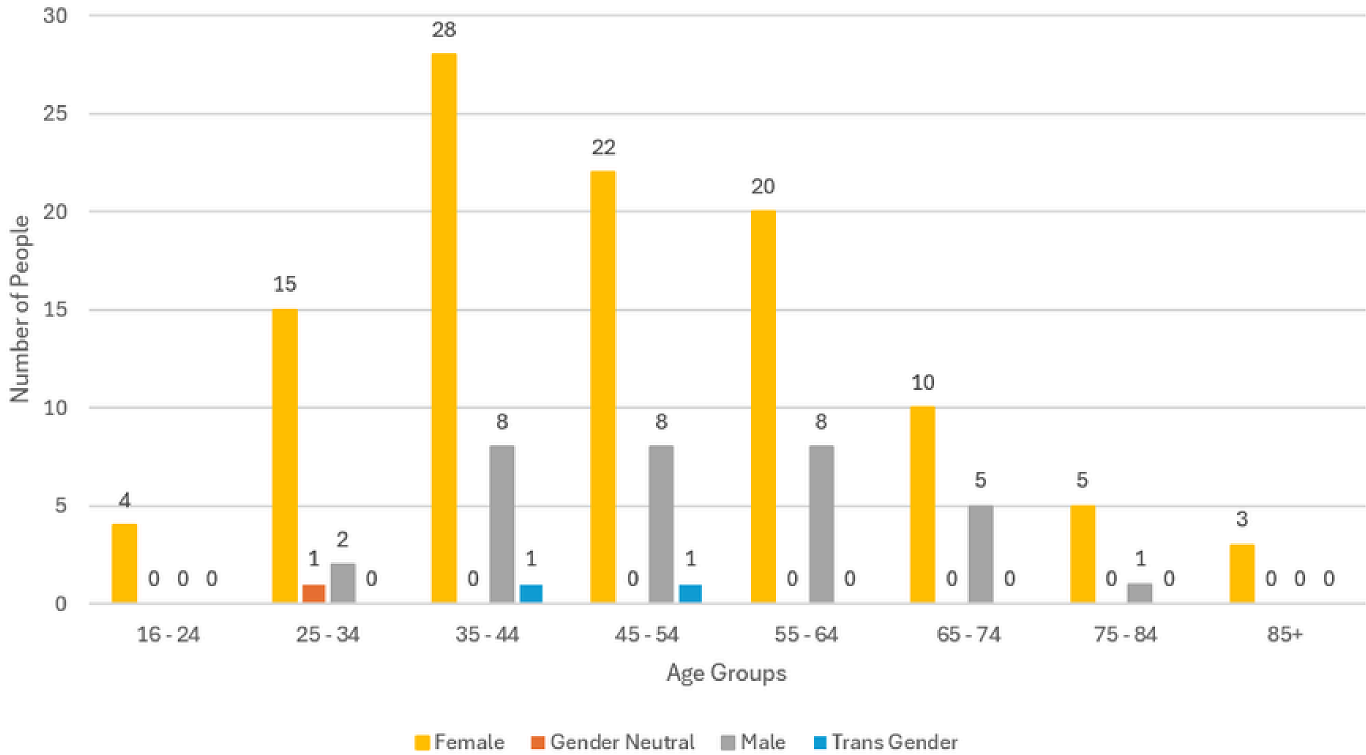
**Tenants with a disability are significantly over-represented within complaint volumes. This suggests that disabled tenants may be experiencing services differently to non-disabled tenants**

The improved awareness our demographic data means we now have a more accurate understanding of who is using the complaints process. While tenants aged 35–44 remain the largest group of complainants, their representation is now much closer to their proportion of the tenant population than in previous years, suggesting a more balanced use of the complaints process. However, older and younger tenants remain underrepresented, indicating that further work is needed to understand and address potential barriers to raising concerns. The proportion of disabled complainants reporting an impact on their mental health has increased, highlighting the importance of resolving issues promptly and ensuring tailored support is provided to vulnerable tenants.

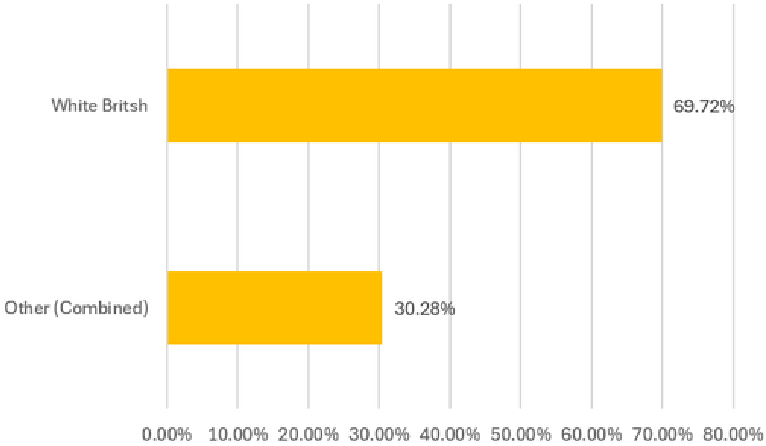
Our complaints data shows that the ethnicity profile of tenants using our complaints service is broadly representative of our overall tenant population. However, there are differences in age, gender and disability. Women, tenants aged 35–44 and tenants with disabilities are more likely to raise complaints, while older tenants and some ethnic minority groups, particularly Pakistani tenants, are less likely to use the complaints process.

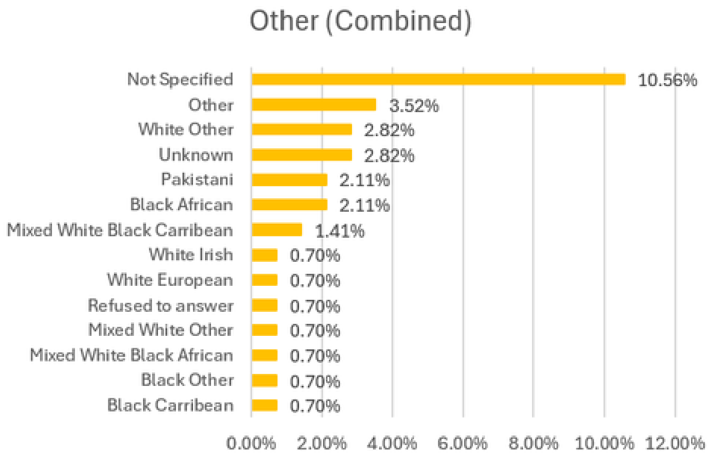
This highlights the need for us to better understand the experiences of disabled tenants, increase engagement with older tenants and underrepresented groups, and ensure all tenants feel confident and supported when raising concerns. We will continue to monitor this data and use it to improve accessibility, communication and equality of access to our complaints service.

## Complainants by Age Groups

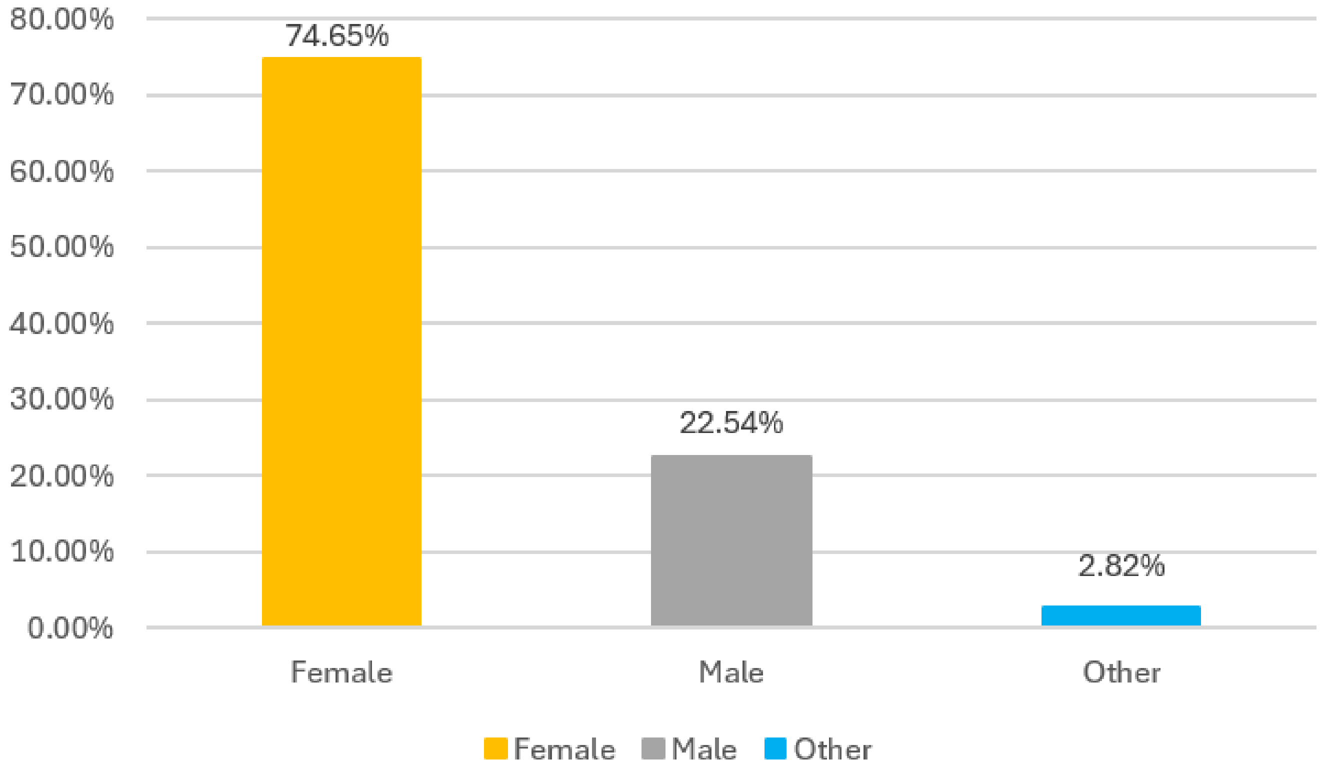



## Complainants by Ethnicity

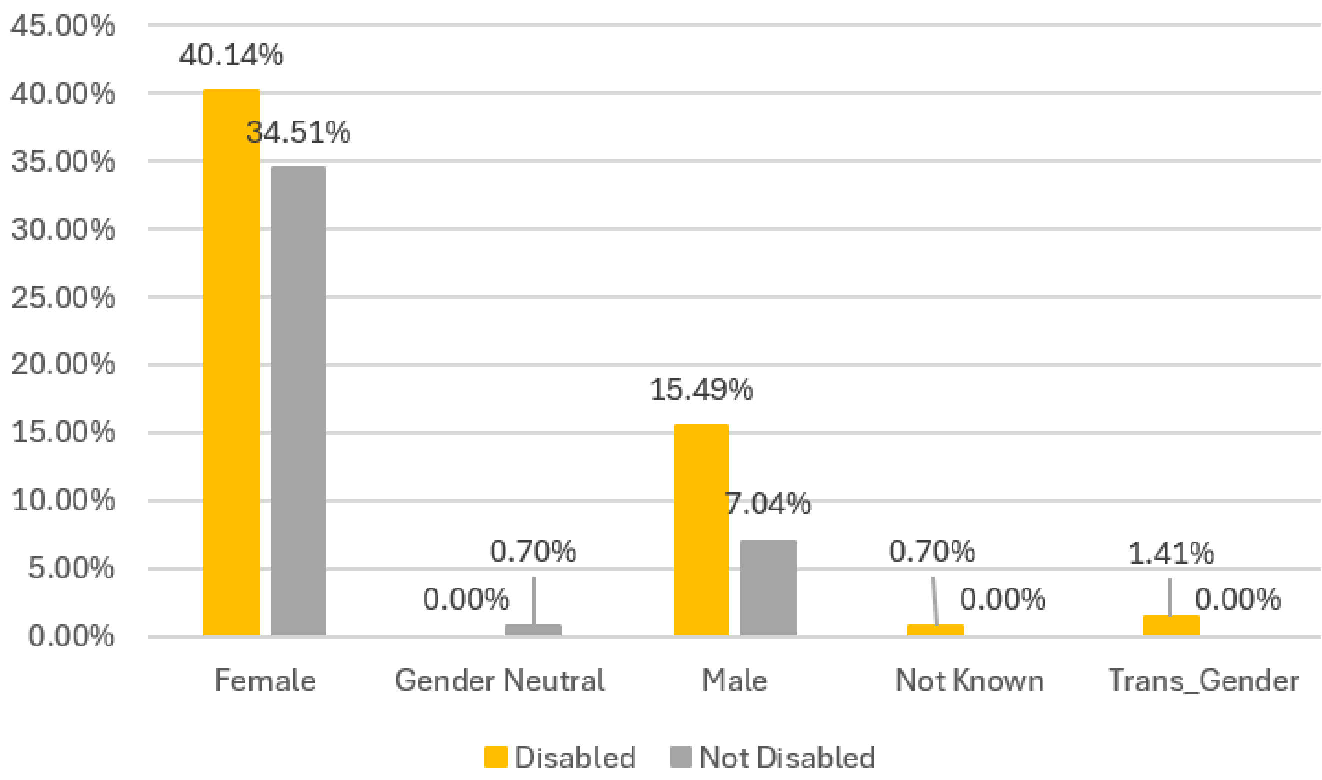


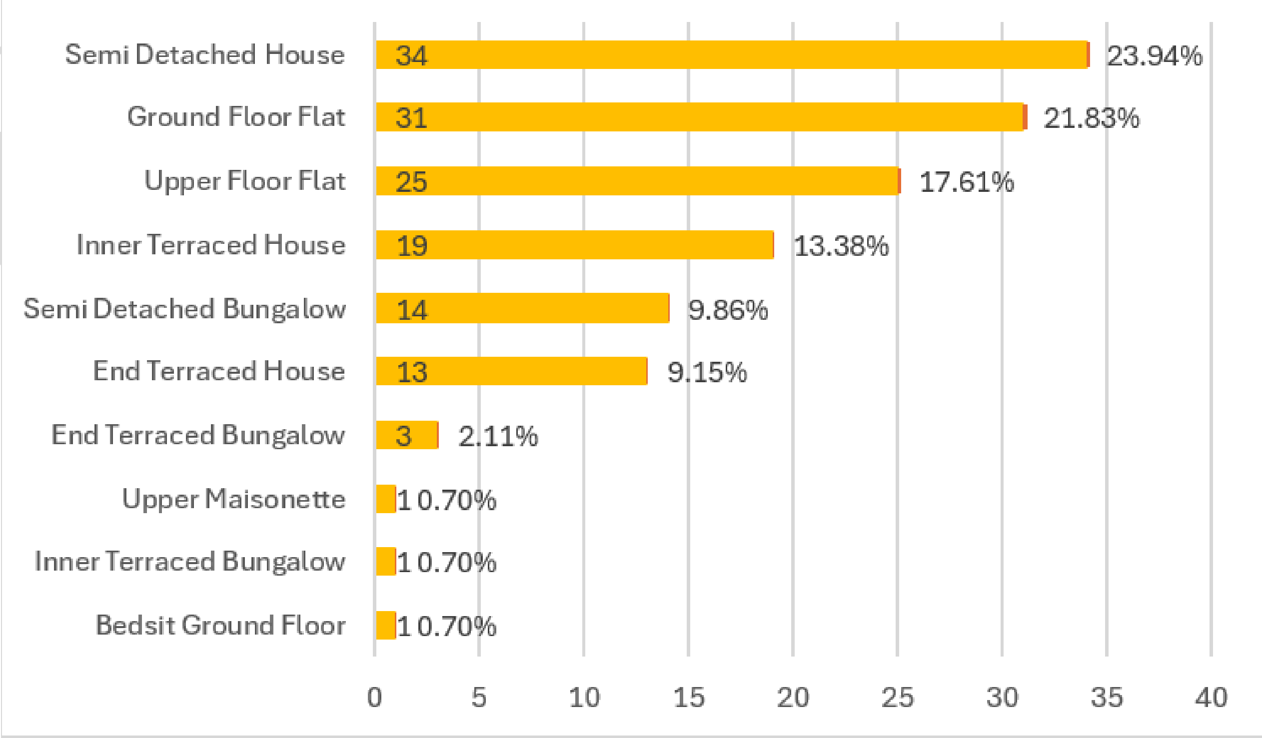
## Complainants by Gender




## Complainants by Disabilities



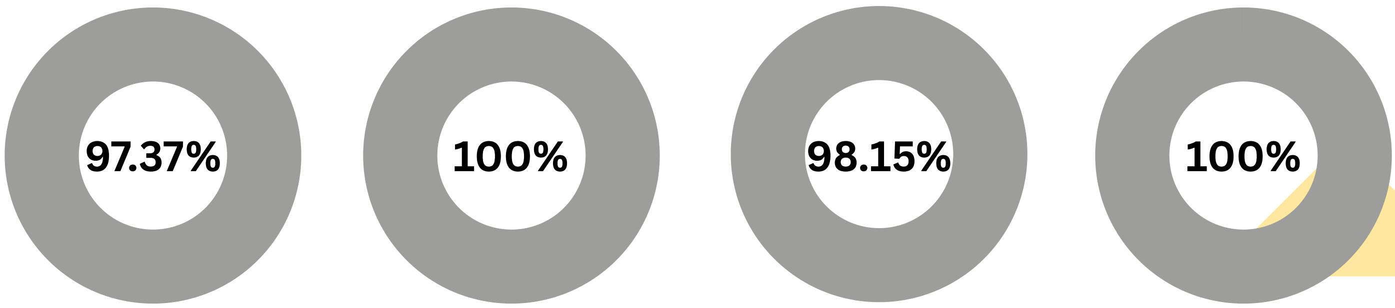
## Complainants by Property Type




As seen in the above graph, the second highest number of complainants come from those living in a ground floor flat. These complainants are more likely to complain about noise nuisance coming from the person living in the flat above them. As a result of feedback associated to noise nuisance, we are looking at installing noise insulating flooring in above floor flats in an attempt to reduce the problem.

## Complaint performance

We have assessed our performance based on the requirements of the Complaint Handling Code 2024. The table below shows how we perform again these requirements.




**Stage 1:**
Acknowledgements within 5 working days of receipt.

**Stage 1:**
Respond within 10 working days of acknowledgement.

**Stage 2:**
Respond within 20 working days of escalation.

**Stage 2:**
Acknowledgements within 5 working days of receipt.

## Complaint outcomes

### Stage 1

When tenants tell us they are unhappy with our service, we will investigate their concerns and provide a response. We will explain what went wrong, what we have learned, and any actions we will take to improve our services and prevent the same issues from happening again.

The outcomes of our Stage 1 complaints are shown below.

| Outcome | % of complaints |
|---|---|
| Fully upheld | 39% **(74)** |
| Partially upheld | 9% **(17)** |
| Not upheld | 46% **(87)** |
| Withdrawn | 5% **(10)** |

Therefore, in **48%** of complaints, we accepted partial or full responsibility compared to 61% in previous year.

### Stage 2

If a tenant is dissatisfied with the outcome of a Stage 1 complaint, they can request a Stage 2 review by a more senior manager. The reviewer will consider whether the investigation was fair, thorough and completed correctly.

During 2025/26, **52** Stage 2 complaints were reviewed. The outcomes are shown below.

| Outcome | % of complaints |
|---|---|
| Fully upheld | 32% **(16)** |
| Partially upheld | 22% (**12)** |
| Not upheld | 44% **(23)** |
| Withdrawn | 2% **(1)** |

Therefore, **54%** of stage 2 complaints, we accepted partial or full responsibility, compared to 62% in previous year.

## Complaints by service area

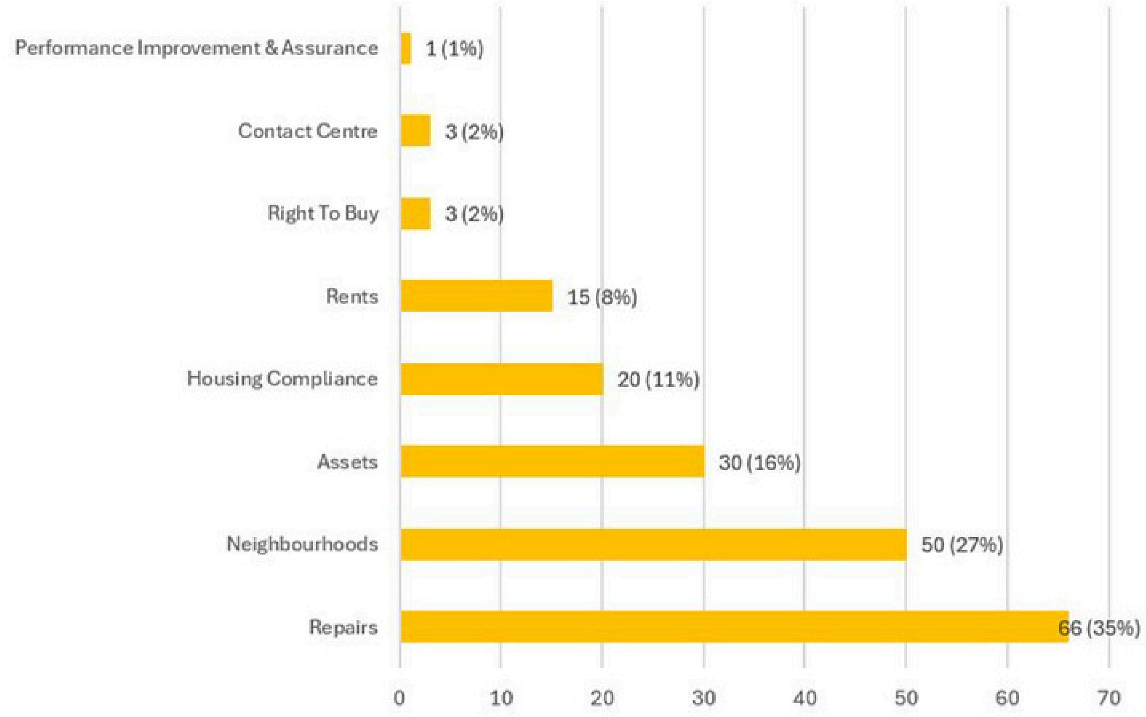
The Repairs service received the most complaints at **35%** This is followed by our Neighbourhoods Team with **27%** with most complaints about Anti-Social Behaviour.

Repairs had the highest number of upheld complaints; however, this equates to just **66** complaints from around 20,000 repairs completed during the year (**0.33%**). Neighbourhood Services, primarily Anti-Social Behaviour and tenancy enforcement cases, generated the highest number of complaints escalated to Stage 2.

**Repairs**
**66** complaints received
**50** upheld (**76%**)
**12** escalated to Stage 2 (**18%**)
**8** upheld at Stage 2 (**67%**)

**Neighbourhoods**
**50** complaints received
**12** upheld (**23%**)
**23** escalated to Stage 2 (**46%**)
**6** upheld at Stage 2 (**26%**)

The graphs below illustrate the number of Stage 1 complaints received by each service area:




A strong example of tenant influence is the joint work between the Repairs Review Group and Neighbourhood Services on noise nuisance. Feedback from tenants and learning from Anti-Social Behaviour cases identified that some ground-floor flats were disproportionately affected by everyday household noise. As a result, we introduced a pilot programme to test enhanced flooring and soundproofing measures, demonstrating how tenant feedback is shaping service improvements and helping to prevent future complaints.

## Repairs Satisfaction

**Tenant Satisfaction Measures (TSM's): Overall satisfaction with repairs**

Repairs Satisfaction 24-25
**75%**
Last Year

Repairs Satisfaction 25-26
**77%**
This Year

**Day to day transactional survey satisfaction**

Day-to-day Satisfaction 24-25
**79%**
Last Year

Day-to-day Satisfaction 25-26
**81%**
This Year

There has been a small but steady improvement in tenant satisfaction from the day-to-day repairs transactional surveys, which are issued following the completion of a repair.

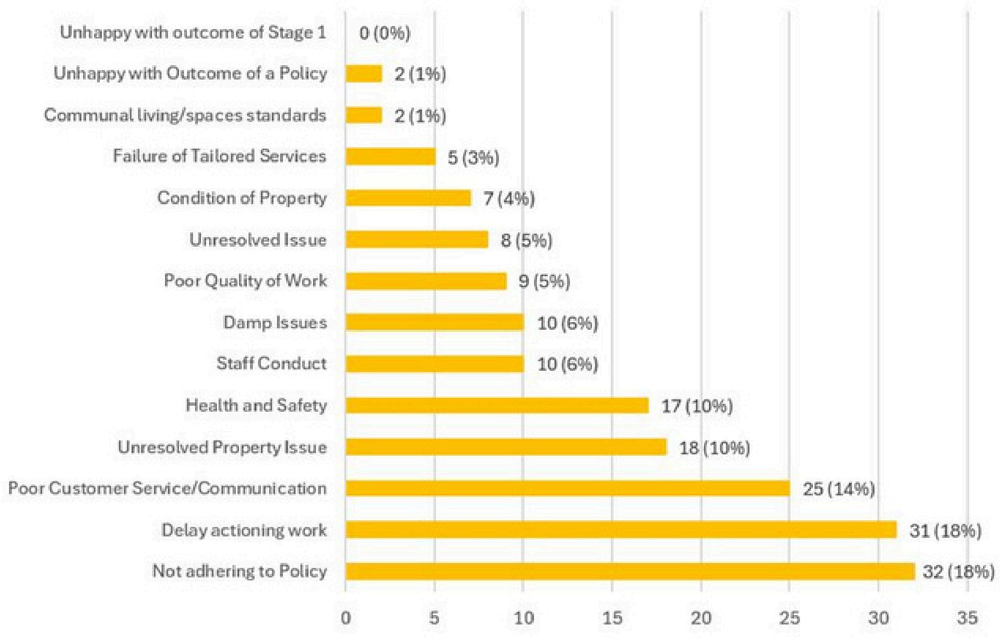
Overall repairs satisfaction has increased from last years 74.55% to this year's 77%.

The transactional survey captures customer feedback immediately after a repair has been completed, whereas the TSM result reflects a broader perception of the repairs service over time. Over the last 12 months, the Repairs Service has undergone significant change, including substantial recruitment activity, revised ways of working, strengthened performance monitoring and increased management oversight. As these improvements continue to embed, it is expected that the positive impact on service delivery and customer satisfaction will continue to be evident in both transactional feedback and future TSM results.

## Complaints by theme

The top three themes for 2025/26 were:

- Not adhering Policy (18%)
- Delay in actioning work (16%**)**
- Poor Customer Service / Communication (14%**)**




Complaints arise from a range of service issues; however, the most frequently reported concerns relate to communication, particularly where tenants feel they have not been kept informed about appointments, repairs, or progress updates.

The most common reasons for complaints this year were due to not following policy decisions, such as tenancy enforcement or anti-social behaviour policies (**32** complaints) and delays in taking action, such as repairs or adaptations (**31** complaints). Tenants also raised concerns about customer service and communication (**25** complaints), highlighting how important it is that we keep tenants informed and respond promptly when issues are reported.

Property-related concerns also featured prominently, with complaints about unresolved property issues (**18** complaints), damp issues (**10** complaints), poor quality work (**9** complaints) and the condition of properties (**7** complaints). These themes show that tenants want issues resolved quickly, effectively and with clear communication throughout.

We carefully review complaint themes to understand what matters most to tenants and where improvements are needed. Ongoing improvements to the repair services, stronger oversight of contractors and performance, recruitment to key roles, the Anti-Social Behaviour improvement plan, and the creation of the Tenant Repairs and ASB Review Group, will all support our improvement journey.

## Complaint Handling Day-To-Day Satisfaction

After each complaint is closed, we ask tenants about their experience of our complaints service. We also measure satisfaction through the annual Tenant Satisfaction Measures (TSM) survey.

Our Tenant Satisfaction Measure for 'satisfaction with the landlords approach to handling complaints' was 37.6% at year end, no change from last years year end figure. Our day-to-day satisfaction, which is a survey sent to tenants after they have made a complaint, results are below.

| Overall Satisfaction | Final outcome satisfaction | Easy to deal with |
| --- | --- | --- |
| 58% | 50% | 50% |

## Learning from complaints

Throughout 2025/26, we remained committed to learning from complaints and feedback to better understand tenant experiences and improve our services. We recognise that we do not always get things right, but we are committed to taking ownership, learning from mistakes, and making improvements as a result. Learning from complaints is regularly shared across the organisation and with Tenant Groups, helping to drive service improvements, promote good practice, and ensure the tenant voice is at the heart of our decision-making.

| What we learned | What we have done |
|---|---|
| **We needed to improve how we respond to Anti-Social Behaviour.** | We have introduced regular case reviews, quality checks and stronger management oversight to make sure Anti-Social Behaviour cases are handled consistently and progressed promptly. We have also created new Anti-Social Behaviour Manager and Enforcement Officer roles, that once recruited to will provide additional support and improve outcomes for tenants. Tenant Feedback resulted in us improving our Anti-Social Behaviour & Hate crime Policy |
| We **needed to improve how we handle complaints and use feedback to make changes.** | We updated our Complaints Policy and complaint handling processes to meet the Housing expectations. The findings from our state service review helped shape a Complaints Improvement Plan, and we worked closely with our Tenant Groups throughout the year to help drive these improvements. |
| **We needed better record keeping and clearer decision-making.** | We have improved the way we record information, evidence and decisions, making it easier to track actions and provide clear explanations to tenants. We have also improved how complaints are logged and monitored through our housing management system. |
| **We needed to provide better support for vulnerable tenants, older & younger tenants' and any ethnicity groups that may not be confident using the complaint process.** | We strengthened the way we identify and record reasonable adjustments and support needs, helping us tailor our services and communication methods to individual circumstances and communications preferences. We upskilled a particular contractor to observe tailored services and apply them better as a result the complaints have stopped. |
| **We needed to ensure services are delivered consistently.** | We provided additional training for staff on complaint handling, Anti-Social Behaviour case management, reasonable adjustments, customer service and the use of housing systems to help improve consistency across services. |
| **We needed to improve the management of repairs, damp and mould cases.** | We strengthened inspection, monitoring and escalation processes to help identify issues earlier, improve oversight of ongoing repairs and ensure problems are resolved more quickly. |

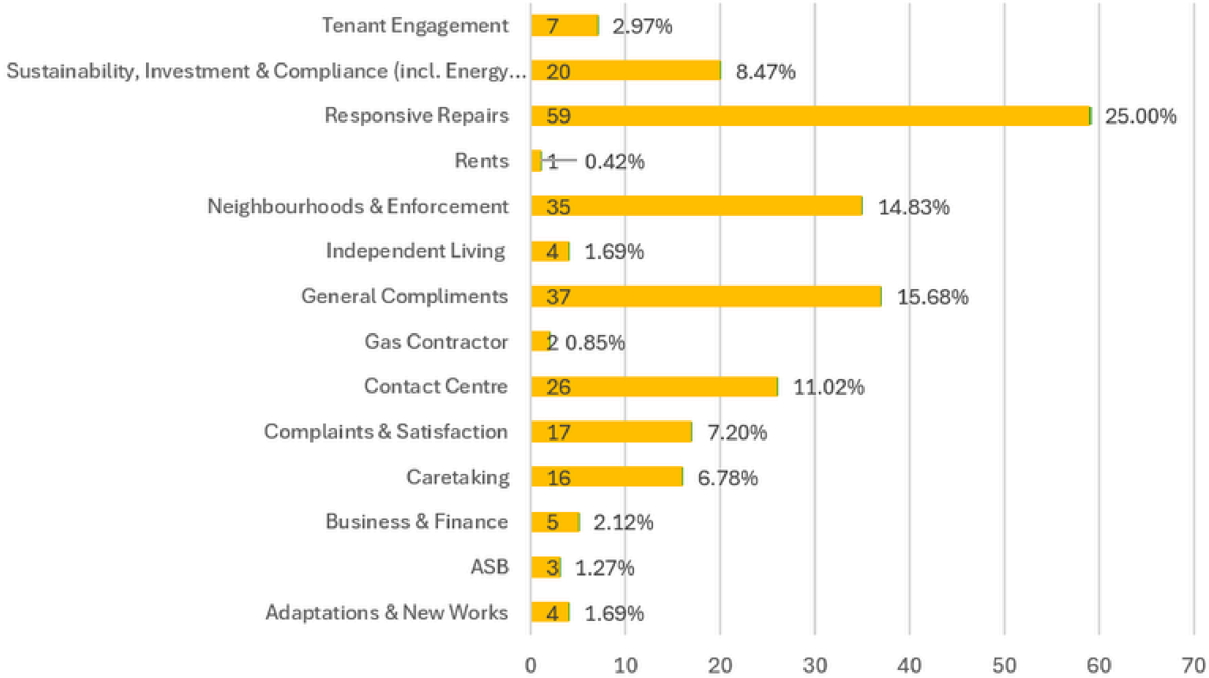
| What we learned | What we have done |
|---|---|
| **We needed contractors to provide a better customer experience.** | We worked with contractors to improve communication, appointment management and customer service standards, helping to deliver a more reliable and responsive service. |
| **We needed stronger oversight of performance and service improvements.** | We introduced enhanced performance reporting, complaint trend analysis and service reviews to help identify recurring issues, monitor progress and drive continuous improvement across housing services. |

## Compliments

Every compliment is shared with teams and staff to recognise good work and help us continue delivering consistent, excellent services. **236** compliments received across Housing Services during the year.  We share all compliments with staff.

**Top 3 areas praised:**

- Repairs: **59** compliments (**25%**). In addition **900+ repairs transactional survey comments were received, 600+ included positive comments**
- General Housing Services: **37** compliments (**16%**)
- Neighbourhoods & Enforcement: **35** compliments (**15%**)




**What tenants told us they were happy with:**

- Quality repairs
- Helpful and professional staff
- Quick responses
- Positive customer service

## Tenant priorities

The Tenant Complaints Review Group reviewed complaint performance information and identified the issues they believe should be prioritised during 2026/27. Tenants agreed that while complaint numbers are important, understanding the causes of complaints and improving satisfaction should remain the focus. Tenants identified three key priorities for improvement during 2026/27.

### 1. Improving Communication and Customer Service

Communication was overwhelmingly identified as the highest priority. Tenants reported frustration at having to repeatedly chase updates on repairs, complaints and ASB cases, and highlighted the need for clearer expectations, regular progress updates and more consistent communication from staff and contractors. Tenants believe that many complaints could be prevented through better communication and customer service.

### 2. Reducing delays and resolving issues faster

Repairs continue to generate the highest number of complaints and remain a key concern for tenants. Feedback highlighted delays, unresolved issues, repeat visits and concerns regarding the quality of completed work. Tenants want repairs completed right first time, improved contractor performance and greater oversight of complex repairs, damp and mould, and other property condition issues.

### 3. Services tenants can rely on

Tenants want confidence that policies are applied fairly and consistently across all services, particularly in relation to anti-social behaviour and tenancy management. They also want services that recognise individual needs, support vulnerable tenants and demonstrate that lessons learned from complaints lead to visible service improvements. Tenants highlighted the importance of transparency, accountability and regular reporting on actions taken.

### Turning feedback into action

Tenant feedback and complaint learning will continue to drive service improvement during 2026/27. Our focus will be on improving communication, reducing repair-related complaints through better performance and oversight, and ensuring services are delivered consistently and fairly. We will regularly review progress through complaints reporting, Tenant Satisfaction Measures, customer feedback and tenant scrutiny to ensure improvements deliver positive outcomes for tenants.

## Housing Ombudsman Service

During 2025/26, the Housing Ombudsman Service made **21** findings on complaints relating to Bury Council Housing Services:

- **8** cases
- **21** findings
- **14** findings categorised as Severe Maladministration, Maladministration or Service Failure
- **7** findings categorised as No Maladministration or Reasonable Redress
- **66.7%** Maladministration outcomes (The national maladministration rates are around 74%.).
- **33.3%** Non-maladministration outcomes

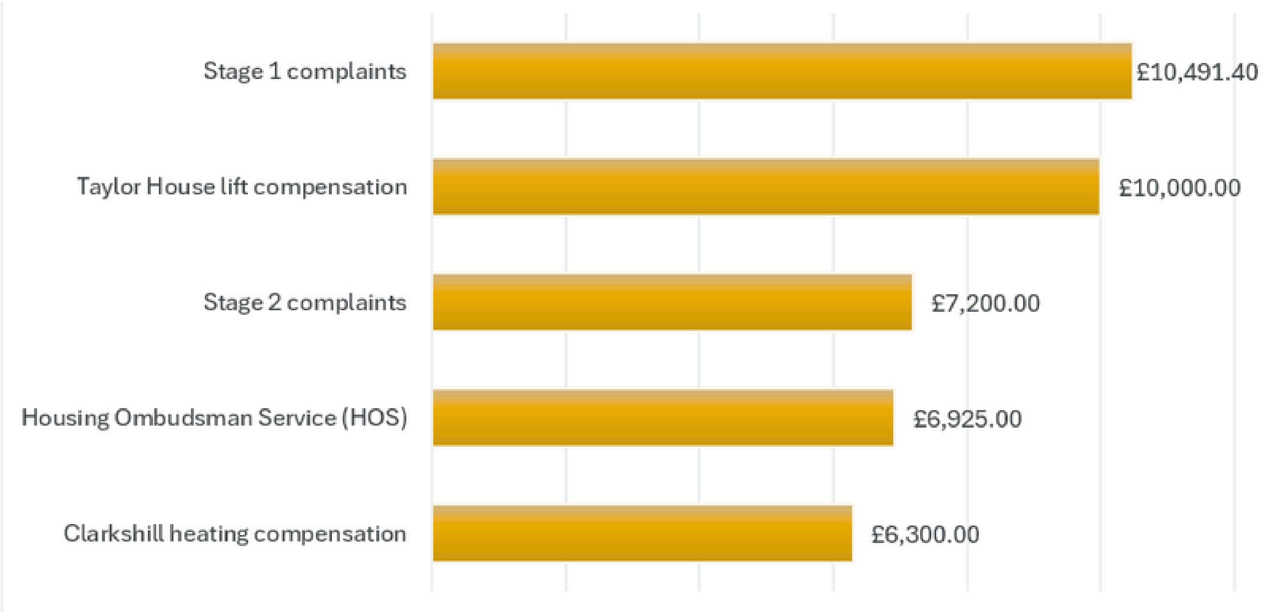
| Year of Case | Service Area / Issue | Decision Outcome | Reporting Year |
|---|---|---|---|
| 2023/24 | ASB | Maladministration | 2025/26 |
| 2023/24 | Damp – Hazard | 2 Severe Maladministrations (handling of reports and complaint handling) | 2025/26 |
| 2024/25 | Gas repairs | Maladministration | 2025/26 |
| 2025/26 | ASB – not following policy/complaint handling | Maladministration (2 findings) | 2025/26 |
| 2025/26 | Sure Repairs | Non-Maladministration | 2025/26 |
| 2025/26 | Property safety | Reasonable Redress | 2025/26 |
| 2025/26 | ASB – not following policy | Maladministration | 2025/26 |
| 2025/26 | ASB – not following policy | Maladministration | 2025/26 |

Find out more:
**https://www.bury.gov.uk/housing/housing-services/about-us/making-a-complaint/housing-ombudsman-cases**

A review of Anti-Social Behaviour complaints and Housing Ombudsman decisions identified opportunities to improve consistency, communication and case management. In response, we have strengthened oversight, improved performance monitoring, introduced regular case reviews, and created new specialist Anti-Social Behaviour roles. These changes will help ensure tenants concerns are dealt with more effectively, learning is acted upon more quickly, and tenants receive a more consistent service.

We used the additional Housing Ombudsman review of our complaint policy to make improvements to wording and ensure compliance. This exercise has been completed with the tenant complaint review group. We have used the information and research from the Ombudsman Spotlight publications to evaluate and improve our services.

## Complaints Compensation




**The Housing Ombudsman awarded compensation totalling £6,925 which was paid to tenants in full.**

## Future Actions

While we have made good progress, we know that lasting improvement comes from consistently applying these changes and delivering better outcomes for tenants. During 2026/27, we will continue to embed these improvements across our services, deliver the recommendations from the state service review ASB and complaint review, and monitor their impact through performance reporting.

We also recognise the need to acknowledge complaint trends more quickly so we can take appropriate actions sooner. Improvements to our housing management systems will strengthen reporting, reduce manual process and help us make better use of performance information. We are also committed to ensure that all upheld complaints with outstanding actions, such as repairs and learning, are completed and showcased quickly to offer greater tenant and leaseholder satisfaction.

We have identified further work needs to be done understanding tenants' needs, and tailoring our approach accordingly. We have planned training for Autumn 2026 to upskill our staff and contractors around the Vulnerable tenant and Reasonable adjustment Policy.

We are committed to improving the experience of all tenants who use our complaints service, particularly those who may need additional support. By better understanding individual needs and making reasonable adjustments at the earliest opportunity, we can provide a more personalised service and improve communication throughout the complaints process.

**We will continue to:**

- Share complaints performance, learning and improvement actions on our website, so tenants can see how their feedback is helping to improve services.
- Be open and honest when things go wrong, learning from mistakes and making changes to prevent issues from happening again.
- Share learning and good practice with tenants and staff through regular updates, internal communications and staff newsletters.
- Promote the different ways tenants can raise a complaint through our website, posters, QR codes, newsletters and social media.
- Work with Tenant Voice and the Tenant Complaint Review Group to review feedback, shape improvements and keep the tenant voice at the heart of decision-making.
- Strengthen transparency through our Listening to you, improving together reporting, showing how tenant feedback has influenced change.
- Use complaints, compliments, surveys and tenant feedback to identify trends, improve services and achieve better outcomes for tenants.

Bury Council

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0161 686 8000

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**Governing Body Assurance Statement**

**Review and Compliance Assurance**

*The Housing Services Complaint Handling Self-Assessment, Annual Complaints Performance and Service Improvement Report, Complaints Policy and supporting evidence have been reviewed. The evidence demonstrates that appropriate arrangements are in place to comply with the Housing Ombudsman Complaint Handling Code and that complaints are recognised as a valuable source of customer feedback, learning and service improvement.*

*Review of the self-assessment and supporting evidence confirms that no areas of non-compliance with the Housing Ombudsman Complaint Handling Code have been identified. There is assurance that policies, procedures and operational arrangements remain aligned with the requirements of the Code and reflect recent recommendations and good practice issued by the Housing Ombudsman Service.*

**Governance, Scrutiny and Oversight**

*It is evident that robust governance arrangements are in place to oversee complaint handling performance and compliance. Regular updates have been provided throughout the year on complaint volumes, performance, outcomes, Ombudsman determinations, external review, lessons learned and service improvements arising from complaints. Complaints continue to be scrutinised through established governance arrangements, including the Housing Advisory Board, Cabinet reporting, the Member Responsible for Complaints, senior leadership oversight and the Tenant Complaints Review Group.*

*There is assurance that these arrangements provide appropriate challenge and oversight, ensuring that learning arising from complaints is reviewed, monitored and translated into service improvements. Complaints remain visible at both operational and strategic levels within the organisation and continue to support accountability and service improvement.*

**Investment in Complaint Handling**

*It is recognised that progress has been made during the past year to strengthen complaint handling across Housing Services. This has included improvements to complaint recording, governance, oversight, reporting, service learning and accountability*

*The evidence demonstrates that a significant investment has been made in complaint handling resources, with the service expanding from a single dedicated officer to a dedicated team comprising a Complaints Manager and two Complaint Investigation Officers. This additional capacity has improved resilience, strengthened oversight, increased the quality of investigations and created greater opportunity to focus on learning and service improvement.*

*There is assurance that this investment reflects the Council's commitment to treating complaints as a core service and ensuring sufficient resources are available to deliver a fair, accessible and effective complaints service for tenants.*

**Tenant Outcomes and Service Improvement**

*It is encouraging to see that improvements to complaint handling arrangements are delivering positive outcomes for tenants. Tenant satisfaction with complaint handling increased during the year and year-end performance exceeded sector benchmark levels, indicating improved confidence in the complaints process and the quality of responses provided.*

*It is acknowledged that tenant involvement through the Complaints Review Group and wider engagement activities has informed service improvements, policy development and the ongoing review of complaint handling arrangements. There is clear evidence that tenant scrutiny is strengthening service delivery, increasing transparency and supporting continuous improvement.*

**Learning, Accountability and Culture**

*The self-assessment demonstrates that Housing Services has continued to strengthen a positive complaint handling culture. Complaints are increasingly being used as a source of intelligence to identify trends, understand customer experiences and drive service improvements. Learning from complaints is reviewed regularly and improvement actions are monitored to ensure changes are embedded across services.*

*It is apparent that progress has been made in strengthening complaint investigations, improving communication with tenants, enhancing the identification and delivery of reasonable adjustments, and ensuring that remedies are considered and delivered promptly where service failures are identified.*

**Priorities for 2026/27**

*Whilst significant progress has been made during the year, there remains a commitment to continuous improvement. Key priorities for the coming year include:*

- Continuing to improve tenant satisfaction with complaint handling.
- Embedding learning from complaints within operational service delivery.
- Strengthening awareness of complaint handling responsibilities across all teams.
- Continuing to improve support for vulnerable tenants and the application of reasonable adjustments.
- Enhancing tenant scrutiny and involvement in complaint performance and learning

- Maintaining full compliance with the Housing Ombudsman Complaint Handling Code.
- Using complaint intelligence to drive service improvement and improve customer outcomes.

**Governing Body Conclusion**

*Having reviewed the Self-Assessment, Annual Complaints Performance and Service Improvement Report, Complaints Policy and supporting evidence, there is assurance that the Council has effective arrangements in place for handling complaints, learning from customer feedback and meeting the requirements of the Housing Ombudsman Complaint Handling Code.*

*Review of the evidence confirms that no areas of non-compliance have been identified through the self-assessment process, that complaint handling resources have been strengthened significantly during the year, and that tenant satisfaction with complaint handling has improved whilst exceeding sector benchmark performance.*

*It is evident that complaints receive appropriate strategic oversight, that lessons learned are translated into service improvements, and that the organisation remains committed to delivering a fair, transparent, accessible and resident-focused complaints service. It is further recognised that governance, scrutiny and assurance arrangements have continued to mature, ensuring that complaints remain a key driver for accountability, organisational learning and continuous improvement.*

Signed: Eamonn O’Brien

**Leader of the Council**

Date: 29/07/2026

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Agenda Item 10

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

| | | |
|---|---|---|
| **Report to:** | Cabinet | **Date:** 09 September 2026 |
| **Subject:** | HRA Capital Investment Programme 2026.2027 Major Refurbishment Works - Heating and Hot Water<br><br>Request to enter contract with Axis Europe Limited and British Gas Social Housing Limited for Gas boiler replacement programme. | |
| **Report of** | Cabinet Member for Housing Services | |

## Summary


1. On 11th February 2026 Cabinet approved the Housing Revenue Account ("HRA") Capital Works Programme for 2026/27 and a budget of £2,015,000 for Major Refurbishment Works - Heating and Hot Water

2. The purpose of the current report is to seek formal approval of the following contract awards for the Gas boiler replacement programme:


## Tender Process

3. Housing Services is seeking to award two contracts for boiler replacement works to domestic properties within Bury Council's social housing stock.

4. Tender prices have been sought through the Procurement for Housing (PfH) Framework, with framework contractors invited to express an interest in delivering the works.

5. Expressions of interest received were reviewed against the framework rankings applicable to the relevant lot. These rankings were established by PfH through the framework procurement process and were based on suppliers' responses to quality and commercial evaluation criteria.

6. In accordance with the framework call-off procedure, the highest-ranked contractors who expressed an interest, Axis Europe Limited(Company number 01991637) and British Gas Social Housing Limited (Company number 01026007), were invited to submit priced tenders for the works.

## Evaluation

7. As the procurement is being undertaken via a direct award process under the PfH Framework, the evaluation will primarily focus on price. Submitted tender

returns will be benchmarked by Procurement for Housing to ensure value for money. Any pricing anomalies identified during the benchmarking process will be clarified with the relevant contractor and resolved before a recommendation is made.

**Timescales**

8. The evaluation exercise is expected to be completed during the week commencing 24 August 2026. The anticipated combined contract value is approximately £1.8 million, including VAT.

9. Housing Services has made it clear to bidders that Bury Council reserves the right to award all works to a single contractor if the tender submissions do not demonstrate appropriate value for money across both contracts.

10. The contract(s) are anticipated to commence in September/October 2026, with completion scheduled for February/March 2027.

**Recommendation (s)**

11. Given the tight timescales associated with the return and evaluation of tenders, Cabinet is requested to:

    11.1 Delegate authority to award the contract(s) for the Gas Boiler Replacement Programme to the Director of Housing.

    11.2 Delegate authority for the finalisation and sealing of the contract(s) to the Director of Law and Democratic Services, in consultation with the Director of Housing.

12. This delegation will enable the timely award of the contract(s) and support the delivery of the approved 2026/27 HRA Capital Works Programme.

**Reasons for recommendation(s)**

13. Property data indicates that the existing gas boilers are approaching renewal and upgrade. The investment helps to ensure timely replacement and upgrade of heating and hot water provision for our tenants. Whilst helping to ensure DHS standards are met, which includes property state of repair and provision of thermal comfort.

**Alternative options considered and rejected**

14. Do nothing: The gas boiler replacements are necessary to help achieve legislative requirements around DHS. Also to ensure our tenants have access to energy efficient heating and hot water provision.

15. Deliver Inhouse: Due to the specialist scope of work within these contracts there is both a lack of suitable skills and capacity for the in-house contractor (Repairs Direct).

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**Report Author and Contact Details:**

*Name: Boe Haslam*
*Position: Head of Housing – Property*
*Department: Corporate Core*
*E-mail:* b.haslam@bury.gov.uk

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**Background**

16. A gas boiler replacement programme has been developed using boiler installation dates and stock condition data to identify properties requiring replacement. The programme relates to Council-owned properties located throughout the Borough of Bury.

17. To facilitate efficient delivery and maximise contractor capacity, the procurement exercise has been divided into locality-based lots. The properties have been broadly and evenly distributed across the North Bury and South Bury areas, enabling a balanced allocation of works and improved contract management throughout the delivery period.

18. The contract(s) are anticipated to commence in September/October 2026, with completion scheduled for February/March 2027. This programme will ensure the continued provision of safe, reliable and energy-efficient heating systems across the Council's housing stock while supporting compliance with statutory landlord obligations.

**Social value**

19. All contracts will ensure that social value is maximised with project specific outcomes agreed at the contract award meetings. All contractors have a good track record of delivering social value through the contracts awarded through the procurement frameworks.

20. Although the contractors' submissions will be evaluated solely based on price, contractors have been encouraged to contribute towards local Social Value objectives. Accordingly, contractors were invited to provide details of

any Social Value initiatives that their organisation could support within the Bury area.

21. To assist contractors in developing their proposals, a list of local Social Value opportunities within Bury was provided. Contractors were requested to submit details of their proposed Social Value commitments prior to the commencement of works on site.

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**Links with the Corporate Priorities:**

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

**23.** **Improved Quality of Life**: These contracts help to provide more modern energy efficient homes that meet the Regulator's Decent Homes Standard. The measures aim to provide improved space heating and hot water provision, deliver thermal comfort with improved energy efficient gas boiler systems. Installing A-rated boilers in accordance with the heating and boiler specification will help reduce energy consumption and lower fuel bills. This will deliver positive outcomes for our tenants through improved energy efficiency and affordability, while also benefiting our homes and supporting environmental sustainability.

**24.** **2025 Vision and Aims:** These contracts help move forward the continued HRA capital investment in the boroughs Council Housing stock. Helps to ensure all the Council's homes meet the DHS and the minimum energy rating of EPC Band C by 2030. Additionally ensuring capital investment provides positive outcomes for our tenants and communities with the aim to lessen the impact of Fuel Poverty and cost of living.

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**Equality Impact and Considerations:**

25. Initial screening has shown that this activity is unlikely to have a material impact on people or organisations in relation to equalities there are therefore no equality impacts or concerns at this stage

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**Environmental Impact and Considerations:**

26. The proposed Ideal Logic 30kW condensing gas boilers provide a high-efficiency heating solution for residential properties. The boilers achieve an ErP A-rating and seasonal efficiency of up to approximately 93-94%, helping

to reduce fuel consumption and associated carbon emissions compared with older non-condensing boiler systems.

27. The chosen boiler offers an efficient and reliable heating solution for social housing developments, with high seasonal efficiency, low NOx emissions and compatibility with future low-carbon technologies. Although the system relies on natural gas and therefore continues to generate carbon emissions, its environmental impact can be reduced through good building fabric standards, smart controls and effective maintenance practices.

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**Assessment and Mitigation of Risk:**

| Risk / opportunity | Mitigation |
|---|---|
| Works identified as required though Stock condition and cross-referencing property data. | The Council aims to complete Stock condition surveys of properties, currently achieving 88% completion. This data will help to identify priorities for forthcoming investment programmes. Full scoping has been carried out to identify the amount of works required to compile a valued tender for each contract to achieve accurate prices, VFM and social value from contractors. Cabinet approval will enable the Council to award the contract to address the required improvements. |
| Council Homes failing to meet Decent Homes Standard | The proposed contracts enable us to deliver improvements to Council homes that ensure our properties continue to meet the Decent Homes Standard and provide good quality, energy efficient, well maintained and safe homes for our tenants. |
| Failure to bring all homes to EPC C or above by 2030 (GM target) | The proposed works continue to bring properties to EPC C or above, working towards the local GMHP target of all homes being EPC C or above by 2030. |

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**Procurement Implications:**

27. This has followed a Procurement compliant process

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**Legal Implications:**

28. Cabinet can delegate the contract award decision under the Council's Constitution and Scheme of Delegations. Approving the recommendation would enable the award decision to be made by the delegated decision maker within the parameters already agreed by Cabinet, and in accordance with the Council's Contract Procedure Rules. The delegated officer must ensure that the procurement has been conducted lawfully and in accordance with the published evaluation criteria. Delegation avoids the need to return to Cabinet and does not present additional risk, provided that the award is within the scope of the approvals already given.

29. Delegation in this instance would his delegation will enable the timely award of the contract(s) and support the delivery of the approved 2026/27 HRA Capital Works Programme.

**Financial Implications:**

30. The cost of the works commissioned following contract award will be met from the HRA approved capital programme.

**Appendices:**

None.

**Background papers:**

None.

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

| Term | Meaning |
|---|---|
| | |

Agenda Item 11

Bury Council

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

| Report to: | Cabinet | Date: 09 September 2026 |
|---|---|---|
| Subject: | Contract awards in respect of the HRA Capital Investment Programme 2026/27 and Carbon Reduction - Sustainability Improvement Measures | |
| Report of | Cabinet Member for Housing Services | |


**Summary**

1. On 11th February 2026 Cabinet approved the Housing Revenue Account ("HRA") Capital Works Programme for 2026/27 and a budget of £5.6m for Carbon reduction schemes - Sustainability Improvement Measures.

2. The purpose of the current report is to seek formal approval of the following contract awards for Carbon reduction schemes below:

   a) An extension of the existing contract between the Council and A.Connolly Limited (Company number 03860866) ("A.Connolly") for a further term of 12 months commencing on 8th September 2026 and total estimated contract value of £2,520,090.72 (inclusive of VAT). During the period of extension, the work carried out by A.Connolly will be in respect of the Bent Hill estate Prestwich Sedgely Ward - 140 properties, which forms part of Programme A.

   b) A contract award to Next Energy Solutions Ltd (Company number 10147744) ("Next Energy") in respect of the estates mentioned below at 2.1 which comprise of Programme B, for an initial term of 8 months (proposed commencement date of 25th September 2026 and the option to extend for two further years taken as 12 month increments, from 1st April 2027 at the Council's sole discretion. The total estimated contract value for the initial term is £2,608,261.32 inclusive of VAT.

3. The total estimated future contract values in the event the options to extend are utilised by the Council are as follows:

   - First 12-month extension: £3,912,391.98 (inclusive of VAT)
   - Second 12-month extension: £3,912,391.98 (inclusive of VAT)

4. The estimated future contract values for the extension periods represent annualised values calculated on a pro rata basis from the initial term figure.

5. The Estates comprising of Programme B are:

- 2.1.2 Goshen Estate, Redvales Ward - 95 properties
- 2.1.3 Knowles St Estate, Redbank Ward - 6 properties
- 2.1.4 Sumner Avenue Estate, Radcliffe North and Ainsworth Ward - 24 properties

6. Decent Homes Standard - Thermal Comfort fails for 70 properties throughout the borough. These are located within the Redvales, Ramsbottom, Besses, North Manor, Bury East areas.

**Recommendation(s)**

7. Cabinet is asked to approve the following:

7.1 An extension of the existing contract between the Council and A.Connolly Limited (Company number 03860866) in respect of Bent Hill estate, Prestwich, Sedgley Ward – 140 properties, which forms part of Programme A, for a further term of 12 months commencing on 8th September 2026 and a total estimated contract value of £2,520,090.72 (inclusive of VAT).

7.2 A contract award to Next Energy Solutions Ltd (Company number 10147744), in respect of the Estates comprising of Programme B and as outlined at 2.1, for an initial term of 8 months (proposed commencement date of 25th September 2026 and the option to extend for a further two years taken as 12-month increments from 1st April 2027, at the Council's sole discretion. The total estimated contract value for the initial term is £2,608,261.32 (inclusive of VAT). The total estimated future contract values in the event the options to extend are utilised by the Council are as follows:

- **First 12-month extension:** £3,912,391.98 (inclusive of VAT)
- **Second 12-month extension:** £3,912,391.98 (inclusive of VAT)

The estimated future contract values for the extension periods represent annualised values calculated on a pro rata basis from the initial term figure.

**Reasons for recommendation(s)**

8. The primary reason for requesting the contract extension with A.Connolly and contract award to Next Energy is to ensure continuation of the Bury Council Housing retrofit programme, which is aimed at helping to achieve Energy Performance Certificate ("EPC") C by 2030 along with aims to reduce energy consumption and carbon emissions. Retrofit surveys are underway in preparation for Social Housing/Warm Homes Fund (Wave 3) grant application which is essential to support HRA capital investment.

**Alternative options considered and rejected**

9. Do nothing: The energy schemes are necessary to help achieve legislative requirements of EPC C by 2030 and Net Zero ambitions in line with GMHP by 2038.

10. Deliver Inhouse: Due to the specialist scope of work within these contracts there is both a lack of suitable skills and capacity for the in-house contractor (Repairs Direct).

11. Re- tender: This option was considered for A.Connolly relating to the Bent Hill scheme and would be possible; however, this would involve a significantly extended procurement process in both time and cost.

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**Report Author and Contact Details:**

*Name: Boe Haslam*
*Position: Head of Housing – Property*
*Department: Corporate Core*
*E-mail:* b.haslam@bury.gov.uk

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**Background**

**Programme A - Bent Hill Estate, Prestwich, Sedgely Ward.**

12. The contract with A.Connolly that was awarded in 2025 had an initial term of 1 year, with the option to extend for a further 1 year at the Council's sole discretion. The total estimated contract value in respect of the 12-month extension that the Council seeks to utilise is £2,520,090.72 (inclusive of VAT). Whilst the previous Cabinet approval from July 2025 made reference to the contract having an option to extend, the contract value in respect of any extension was unknown at that time, which is the basis upon which Cabinet approval in respect of the extension is now being sought.

13. The scheme centres on fabric first approach, subject to retrofit surveys the energy measures include windows and doors, cavity wall and loft insulation, energy efficient lighting, ventilation, solar PV where appropriate.

14. This is a targeted estate with higher percentage of EPC rated D properties. Total number of properties is 241 this includes 120 with EPC C, 121 EPC D or E. The programme will be delivered over 2 years with 140 properties included in 2026/27 and the extension is being sought to as to ensure than the Council is able to have these works undertaken in a timely manner.

**Programme B - Various estates**

15. The Council undertook a compliant procurement exercise to undertake works at the estates mentioned below, by way of a Mini-Competition from the GMCA 911 Net Zero: Housing Retrofit Framework Agreement, Lot 13 – Turnkey Solutions. Next Energy were selected following submission of tenders and a fair evaluation exercise by Bury Council's Procurement Team. The total estimated contract value (for the initial term) of the contract for the works to be undertake by Next Energy in respect of Programme B is £2,608,261.32

inclusive of VAT. This amount is within the budget envelope requested within the HRA at Cabinet in February 2026.

16 The Estates comprising of Programme B are:

- **Goshen Estate, Redvales Ward** 95 properties, 48 EPC D, with EPC C properties which are low C and in need of upgrades of degraded insulation and a large number of windows and doors to be replaced along with delivering improved ventilation.

- **Knowles St Estate, Redbank Ward** 6 properties 2 of which are EPC D, remaining properties are very low EPC C, with minimal previous investment to complete works in the area.

- **Sumner Avenue - Ainsworth Estate, Radcliffe North and Ainsworth Ward** 24 properties, 9 EPC C and 15 EPC D

- **Decent Home standard** - Thermal Comfort failures for 70 properties throughout the borough. These are located within the Redvales, Ramsbottom, Besses, North Manor, Bury East areas.

**Possible Grant Funding**

17. Bury Council's Housing Carbon reduction schemes, depending upon availability of grant funds, can qualify for up to £7,000 for EPC D and below rated properties to improve to EPC C.

18. Grant funding is essential to support HRA capital funds for retrofit works and achieving EPC C targets. Retrofit assessments are underway in preparation for bid application to GMCA for Warm Homes Social Housing Fund be submitted in July 2026.

**Social value**

19. All contracts will ensure that social value is maximised with project specific outcomes agreed at the contract award meetings. All contractors have a good track record of delivering social value through the contracts awarded through the procurement frameworks**.**

20. Social Value commitments include but not limited to Winter warmer packs, local supplies, Swift Boxes, working with Bury college, Open days, litter picks, Skip days and donations to food banks.

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**Links with the Corporate Priorities:**

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

**22.** **Improved Quality of Life:** These contracts help to provide more modern energy efficient homes that meet the Regulator's Decent Homes Standard. The measures aim to provide improved thermal comfort and ventilation, reduce energy consumption and bills, with positive outcomes for our tenants, homes, and the environment.

**23.** **Vision and Aims:** These contracts help move forward the wider decarbonisation of the boroughs Council Housing stock. Helps to ensure all the Council's homes meet the minimum energy rating of EPC Band C by 2030. Additionally ensuring capital investment provides positive outcomes for our tenants and communities with the aim to lessen the impact of Fuel Poverty and cost of living.

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**Equality Impact and Considerations:**

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

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**Environmental Impact and Considerations:**

25 Bury Council Housing work very closely with Bolton and Bury Swifts to ascertain whether locations for investment could have a detrimental impact for migrating birds. External changes affecting their habitual migrating pattern requires careful consideration and mitigation for example installation of Swift boxes.

26. Additionally undertaking joint community events to raise awareness of the importance of swift colonies and protecting their migrating patterns, for example previous 'Summer Wings' event.

27. Bury Council Housing continue to ensure the retrofit programmes are devised, prioritised and delivered across our housing stock. Bringing about benefits for the dwellings, tenants and the environment in the installation of new windows and doors, cavity and loft insulation, external and internal wall insulation, Air Source Heat Pumps (where appropriate), improved ventilation and Solar PV.

28. Through the delivery of efficiency investment, property savings indicate

- circa **£299 per year** saving on tenant energy bills
- circa **0.68 tonnes of $CO_2$ savings per year** (whole property, including all measures)
- of which approximately **0.30 tonnes per year relates to solar PV generation**

**29. Assessment and Mitigation of Risk:**

| Risk / opportunity | Mitigation |
|---|---|
| Works identified as required through the Stock Condition and Retrofit surveys. | The Council aims to complete Stock condition surveys of properties, currently achieving 88% completion. This data will help to identify priorities for forthcoming investment programmes. Full scoping and surveys have been carried out to each scheme identifying the amount of works required to compile a valued tender for each contract to achieve accurate prices, VFM and social value from contractors. Cabinet approval will enable the Council to award the contract to address the required improvements. |
| Council Homes failing to meet Decent Homes Standard | The proposed contracts enable us to deliver improvements to Council homes that ensure our properties continue to meet the Decent Homes Standard and provide good quality, energy efficient, well maintained and safe homes for our tenants. |
| Failure to bring all homes to EPC C or above by 2030 (GM target) | The proposed works continue to bring properties to EPC C or above, working towards the local GMHP target of all homes being EPC C or above by 2030. |

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**Procurement Implications:**

30. Programme A (Bent Hill Estate Bent Hill Estate, Prestwich, Sedgely Ward) will be delivered through an extension to the existing contract with A.Connolly Limited. The contract includes provisions allowing for extension, and this is being exercised in accordance with those terms. This approach ensures continuity of delivery, builds on established contractor performance, and avoids the time and cost implications of re-procurement, whilst maintaining value for money.

31. Programme B (Various Estates) has been procured via a compliant further competition under the GMCA Net Zero Housing Retrofit Framework Agreement (GMCA911) Lot 13 – Turnkey Solutions. This route to market enabled a robust and transparent process, engaging pre-qualified suppliers

and ensuring delivery by an organisation with the appropriate technical expertise.

33. Both procurement routes comply with the Council's Contract Procedure Rules and relevant procurement legislation. The approach taken supports value for money, minimises procurement risk, and enables the timely delivery of the retrofit programme, which is critical to achieving EPC targets and securing external funding opportunities.

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**Legal Implications:**

34. The contract between the Council and A.Connolly Limited provides for the right to extend the term by a further 1 year, plus 1 year at the Employer's sole discretion. The proposed extension of the contract term is permissible where the original contract expressly provides for such an extension, and the extension is exercised strictly in accordance with those provisions. Provided the scope, duration and any conditions of extension were clearly set out in the procurement documents and contract at the outset, exercising the extension will not constitute a material modification for the purposes of the Public Contracts Regulations 2015 which govern this contract, as it was awarded following a further competition using Procure Plus Dynamic Purchasing System (DPS) for Retrofit Programme delivery Services Lot 3: Retrofit Managing Agents – Installation Delivery.

35. Nevertheless, the Council should ensure that the extension represents value for money, that contractor performance has been satisfactory, and that the decision to extend is properly documented and authorised in line with the Council's contract procedure rules and governance requirements. Whilst the earlier Cabinet report from July 2025 referred to there being a right to extend, the cost of any extension was not known at that time. It is therefore correct that the Council seek Cabinet approval now in respect of this extension, particularly given the contract value, and demonstrates a commitment to ensuring compliance with governance rules and transparency.

36. As a contracting authority, the Council is required to adhere to relevant procurement law in procuring goods, works and services, in addition to following its own Contract Procedure Rules. Both the Procurement Act 2023, and its predecessor the Public Contract Regulations 2015 provide for the utilisation of a Framework as a compliant route to market.

37. The GMCA Net Zero Housing Retrofit Framework Agreement (GMCA911) was established in 2025 and is therefore governed by the Procurement Act 2023. The award that the Council now seeks to make to Next Energy Solutions Ltd has followed a compliant route to procuring of these works.

38. A local authority must exercise its housing functions in accordance with its statutory duties under the Housing Act 2004, including the Housing Health

and Safety Rating System (HHSRS), which requires authorities to address hazards such as excess cold and to secure safe, healthy housing conditions within the borough. In addition, under the Climate Change Act 2008 (as amended) and the Environment Act 2021, local authorities are expected to contribute to the achievement of national carbon reduction targets. The proposed approval of contractors to undertake carbon reduction and sustainability improvement measures for Programme A and Programme B is consistent with these duties, enabling the Council to proactively improve housing standards, reduce fuel poverty risks, and support wider environmental objectives.

39. The retrofit programme and associated works are aligned with the Council's obligations as a social landlord (where applicable) and its strategic housing role, including compliance with the Energy Efficiency (Private Rented Property) (England and Wales) Regulations 2015 (as amended), which impose minimum energy efficiency standards (MEES) for rented properties. Works aimed at improving EPC ratings will assist in ensuring compliance with current and anticipated regulatory thresholds, mitigate enforcement risk, and support tenants' rights to energy-efficient accommodation. Care must be taken to ensure that procurement and contract award processes comply with the Procurement Act 2023 including transparency, equal treatment and value for money considerations.

40. In delivering such programmes, the Council must also have regard to its duties under the Equality Act 2010, ensuring that retrofit and sustainability measures do not adversely impact protected groups and, where possible, advance equality of opportunity (for example, by addressing fuel poverty). Adequate contractual safeguards should be incorporated to manage performance, health and safety, and compliance with building regulations and PAS standards relevant to retrofit works.

41. Overall, the proposed contract awards for Programme A and Programme B support the Council's statutory and policy responsibilities in relation to housing quality, energy efficiency and carbon reduction, provided it is implemented within a robust legal and governance framework.

**Financial Implications:**

42. Approval is being sought to progress to award of contracts for a number of Carbon Reduction schemes which have followed the Council's procurement process.

43. The funding for these schemes was provided for as part of the budget agreed for the HRA Capital Investment Plan for 2026-27.

**Appendices:**

None.

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**Background papers:**

None.

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

| Term | Meaning |
|---|---|
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Bury Council

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

| | | |
|---|---|---|
| **Report to:** | Cabinet | **Date:** 09 September 2026 |
| **Subject:** | A Bed Every Night ("ABEN") - contract extension Adullam Homes | |
| **Report of** | Cabinet Member for Housing Services | |

## 1. Summary

**1.1** This report seeks permission for the Council to extend the current A Bed Every Night ("ABEN") contract between the Council and Adullam Homes Housing Association Limited (company number IP20853R) ("Adullam Homes") for a further period of 12 months, whilst the service re-procure the ABEN provision to reduce the number of individuals rough sleeping within the borough. The ABEN provision provides safe off the street accommodation, as well as the opportunity for individuals to develop independent living skills and break the cycle of homelessness.

**1.2** This report further seeks permission to delegate authority to the Director of Housing to award the new contract and commission, on completion of a compliant tender exercise via CHEST.

**1.3** Greater Manchester has, since 2018, invested heavily in a strategic and mission-oriented approach to end rough sleeping and prevent homelessness across our region. At the core of these efforts is ABEN, which remains a central pillar of our safety net for people experiencing, or at risk of, rough sleeping

**1.4** The ABEN has been delivered locally in four separate tranches, initially operating as a sit-up provision from 2018. The specification for ABEN was subsequently refined during the COVID-19 pandemic, including the "Everyone In" initiative, aligning with the Greater Manchester Mayor's commitment to ending rough sleeping. The model now provides 24-hour accommodation alongside integrated, wraparound support for all individuals accessing the service

**1.5** Adullam Homes has delivered the ABEN service since the procurement of Tranches 3 and 4. The opportunity was advertised on the open market on 2021 however, no bids were received, reflecting the specialist nature of the provision and uncertainty among providers in supporting individuals with complex needs and entrenched rough sleeping histories. Adullam Homes subsequently developed a proposal to deliver the service within the existing cost envelope. The

Council submitted an Exemption Request, which was subsequently approved on 24th June 2021 for the direct award of a contract to Adullam Homes.

**1.6** An exemption was applied for the 2023- 2024 and 2024-2025 (financial years) as the local authority received written confirmation of the GM ABEN grant funding after the existing contract end dates. Additionally, the one-year duration of the grant, limited the timeframe available to initiate a new commissioning cycle. Both exemptions were subsequently approved

**1.7** In April 2026, GMCA confirmed additional grant funding of £1,044,531 to support the continuation of ABEN delivery from 1 April 2026 to 31 March 2029. Due to procurement requirements, advice was received that a new commissioning exercise would be necessary to continue the service. However, given the limited time available prior to the existing contract end date, and delays in notification of the GM ABEN grant, an exemption is required to extend the current arrangements for a further 12 months. This extension would cover the period from 1 April 2026 to 31 March 2027, with a contract value of £335,732 to deliver the agreed 34 units.

**1.8** This extension will ensure continuity of provision while the local authority undertakes the compliant re-procurement via CHEST for the ABEN service covering the period from 1 April 2027 to 31 March 2029 with (an initial two year term) with an option to extend a further 2 x12 month period pending continuation of funding. The total estimated initial contract value for the initial two year term will be £708,799 including vat for the delivery of 34 units, in line with service requirements. In the event that the Council utilises the option to extend for the full further 2 years, the total estimated contract value in respect of the full two-year extension period would be £1,380.263 inclusive of VAT

## 2 Recommendation(s)

**2.1** Authorise Bury Metropolitan Borough Council to extend current ABEN contract with Adullam Homes Housing Association Limited (company number IP20853R) for a 12-month period, commencing on 01st April 2026, and for the total estimated contract value of £335,732 inclusive of VAT

**2.2** Authorise Bury Metropolitan Borough Council to initiate a tender exercise via The Chest to procure a provider for the delivery of ABEN provision, in line with the requirements set out in the grant agreement with the Greater Manchester Combined Authority. This contract having an initial two-year term (proposed commencement date of1st April 2027) and a total estimated contract value of £708,799 including VAT, with the option to extend for a further 2 years (in 12-month increments) at the sole discretion of the Council and with a total estimated contract value of £1,380.263 inclusive of VAT in the event that the full two year extension is utilised.

**2.3** Authorise the delegation for the approval of the award of a new contract to the Director of Housing, following the conclusion of a compliant tender exercise via The Chest.

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

**3.1** There has been a significant increase in the number of individuals experiencing homelessness. This cohort includes multiple disadvantage, individuals leaving custody, who often face additional barriers to securing and maintaining stable accommodation.

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

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

**Alternative options considered and rejected**

**3.3** **Do nothing:** These properties will deliver emergency accommodation, helping to reduce rough sleeping and minimise the length of time individuals spend on the streets. If this option is not pursued, the council will be unlikely to achieve a reduction in rough sleeping, which conflicts with our local, regional, and national homelessness strategies. This would present a risk of reputational damage and a failure to meet our corporate responsibilities.

**3.4** ABEN is a Greater Manchester Mayoral initiative that has been delivered by the local authority since 2019. The programme continues to build on its success year on year and remains a key resource in reducing rough sleeping and breaking cycles of homelessness. Due to current capacity constraints within the service, the ongoing challenges in securing suitable accommodation to support delivery, and its status as an externally grant funded programme with a fixed cost envelope ABEN is most effectively delivered by an external provider.

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**Report Author and Contact Details:**

*Name: Amanda Mullen*
*Position: Manager Homeless and Housing Option Service*
*Department: Corporate Core*
*E-mail: a.mullen@bury.gov.uk*

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**4. Background**

**4.1** The Council has a statutory duty, under the Homelessness Reduction Act 2017, to take reasonable steps to prevent individuals from becoming homeless or sleeping rough within the borough. There has been a notable increase in rough sleeping both nationally and locally, with numbers rising significantly since the COVID-19 pandemic and the introduction of the 'Everyone In' initiative a trend that persists. Contributing factors include challenges associated with prison leavers, asylum and immigration pressures, high demand for housing, entrenched and complex needs and limited effectiveness of prevention measures.

**4.2** In response to rising levels of rough sleeping across Greater Manchester, the Greater Manchester Combined Authority (GMCA) launched the A Bed Every Night (ABEN) programme in 2018. Since then, Greater Manchester local authorities have delivered the programme locally, with both the service offer and the number of accommodation units expanding significantly to meet increasing demand and provide enhanced support for those experiencing rough sleeping.

**4.3** Bury ABEN provides accommodation-based support for individuals who are experiencing, or have previously experienced, rough sleeping, with funding provided by the Greater Manchester Combined Authority (GMCA). The service is commissioned by Bury Metropolitan Borough Council (Bury Council) and delivered in accordance with the funding requirements and grant conditions set by the GMCA.

**4.4** Bury ABEN programme remains a key part of Bury Council's response to rough sleeping and has helped reduce street homelessness since its introduction in 2018. Since 2021, the service has accommodated 500 people experiencing rough sleeping and supported 420 individuals into long-term accommodation. Despite these achievements, Bury has seen two consecutive years of increasing rough sleeping, highlighting the continued need for targeted accommodation and support service

**4.5** The provision is designed to be inclusive and accessible to all individuals experiencing rough sleeping, including veterans, young people, care leavers, women, people in employment, those with no recourse to public funds, individuals with multiple disadvantages, people eligible for Care Act support, individuals with pets, and couples. This inclusivity is vital, ensuring that people are not disadvantaged in accessing support because of their personal circumstances, cultural background, or protected characteristics.

## 5. Current Position

**5.1** Since January 2026, Bury has identified 158 individuals sleeping rough, defined as people bedded down on the streets. Through dedicated outreach support, 34 of these individuals have accessed the ABEN service, helping them move off the streets and preventing further rough sleeping. This demonstrates the significant value and importance of maintaining the ABEN provision.

**5.2** MHCLG has published a three-year homelessness strategy aimed at reducing rough sleeping nationally, with local authorities expected to contribute towards these objectives. More recently, the Government has reaffirmed its commitment to ending rough sleeping, further strengthening the need to maintain ABEN provision.

**5.3** Adullam Homes has delivered the ABEN service since the procurement of Tranches 3 and 4. The current provision comprises 34 units of accommodation across the borough, including a mix of self-contained and shared housing. The service provides emergency accommodation and support for individuals and couples who are at risk of rough sleeping or experienced rough sleeping, helping them access safe accommodation and progress towards longer-term accommodation

**5.5** In March 2026, Bury Council was notified that funding of £1,044,531 had been secured to continue the ABEN service for a further three years. However, delays in receiving formal confirmation of funding and the revised service specification from GMCA meant there was insufficient time to undertake a compliant procurement process before the current contract expired on 31 March 2026. Therefore, a 12-month contract extension is proposed to maintain service continuity while a full commissioning and procurement exercise is undertaken

## 6. Funding

**6.1** Funding is provided through an external grant from the GMCA. The total confirmed grant allocation is £1,044,531. There is an option to extend the contract for a further two 12-month periods, subject to the continuation of external grant funding. The tables below set out the costs associated with a 12-month contract extension and a new two-year commissioned contract.

| **Years – 12-month extension** | **Total** |
|---|---|
| April 2026 – March 2027 - extension | £335,732 |
| **Years – New commission and contract** | |
| April 2027 – March 2028 | £335,732 |

| | |
|---|---|
| April 2028 – March 2028 | £335,732 |
| **Total** | **£1,044,531** |

**Links with the Corporate Priorities:**

The Bury Homelessness Strategy aims to deliver the agreed objective of eliminating all rough sleeping in Bury, by preventing homelessness and providing 'enabling support' towards independence. The Bury Homelessness Strategy also aligns to the Bury Let’s Do It Strategy which provides the vision to enable people of all ages to live well within their neighbourhoods.

**Local**

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

**Enterprise**

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

**Together**

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

**Strengths**

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

**Equality Impact and Considerations:**

7. The analysis has considered the impacts across several characteristics which have been mitigated to ensure all impacts are neutral and specific needs are met through the activity. There are no outstanding equalities concerns.

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**Environmental Impact and Considerations:**

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

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**Assessment and Mitigation of Risk:**

| Risk / opportunity | Mitigation |
|---|---|
| Increase in demand of individuals experiencing rough sleeping or that an individual must rough sleep to access accommodation. | The proposal considered the pathways which are required to ensure early identification of preventing rough sleeping. It includes different ways of working to develop early prevention and panel base meetings and This includes the rough sleeper's task and target and ABEN panel made up of partner agencies. |

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**Procurement Implications:**

9. The tactical extension is necessary to maintain service continuity whilst the tender is undertaken. The tender will be compliant with the Procurement Act 2023 and advertised via Find a Tender website.

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**Legal Implications:**

10. Under Part VII of the Housing Act 1996 (as amended by the Homelessness Act 2002 and the Homelessness Reduction Act 2017), Bury Council, as a local housing authority, owes a range of statutory duties to persons who are homeless or threatened with homelessness.

11. The statutory duties in respect of homelessness set out in Part VII of the Housing Act 1996 were significantly amended by the Homelessness Reduction Act 2017.

**12.** In broad terms, the Council must take active steps both to prevent homelessness and to secure accommodation for those who are already homeless.

**13.** This includes duties owed to all eligible applicants who are homeless or threatened with homelessness within 56 days, requiring the authority to assess their circumstances and take reasonable steps to help them retain or obtain suitable accommodation.

**14.** Where a person is already on the streets or otherwise homeless, the Council must work to “relieve” their homelessness by helping them secure accommodation, and (where there is reason to believe they may be in priority need) must provide interim accommodation pending inquiries. If the statutory criteria are ultimately met (eligibility, homelessness, priority need and non-intentionality), a further duty arises to secure suitable accommodation. Taken together, the statutory scheme places local authorities under a proactive obligation not only to respond to street homelessness, but to intervene early and take reasonable steps to prevent and reduce it.

**15.** In discharging these functions, the Council must have regard to the Homelessness Code of Guidance (issued under s.182 Housing Act 1996) and comply with wider public law and equality duties.

**16.** As a contracting authority, the Council must ensure that all procurements comply with the relevant legislative framework (namely the Procurement Act 2023 or its predecessor, the Public Contract Regulations 2015), and in addition must follow its own Contact Procedure Rules.

**17.** Procurement via The Chest (the North West local authority e- procurement portal) supports compliance with the Procurement Act 2023 by providing a transparent, open and auditable platform through which opportunities are advertised and competed. The Act requires contracting authorities to conduct procurements in accordance with the principles of transparency, equal treatment and fair competition, and to ensure proportionate and value-for-money outcomes. Use of The Chest facilitates these requirements by enabling equal access to the market, structured electronic submission of tenders, and a clear audit trail of the procurement process, thereby supporting a lawful and robust award decision.

**18.** Cabinet can delegate the contract award decision under the Council’s Constitution and Scheme of Delegations. Approving the recommendation would enable the award decision to be made by the delegated decision maker within the parameters already agreed by Cabinet, and in accordance with the Council’s Contract Procedure Rules. The delegated officer must ensure that the procurement has been conducted lawfully and in accordance with the published evaluation criteria. Delegation avoids the need to return to Cabinet and does not present additional risk, provided that the award is within the scope of the approvals already given.

**Financial Implications:**

**19.** As explained in the report the ABEN programme is fully funded by grant, and Bury Council was awarded £1,044,531 of grant by the GMCA to cover the 3-year period from 1 April 2026 through to 31 March 2029. Hence the funding to cover both the extension of the programme for 2026-27 to the existing provider, along with the procurement of a provider for the following two years is already in place. Should something change and any element of the funding be removed before the full procurement exercise takes place then we would look again at what commitment if any the authority could make.

**Appendices:**

*Please list any appended documents (please save these as clearly labelled separate documents in the Teams folder).*

**Background papers:**

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

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

| Term | Meaning |
| --- | --- |
| | |

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Bury Council

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

| | | |
|---|---|---|
| **Report to:** | Cabinet | **Date:** 09 September 2026 |
| **Subject:** | Care at Home – Request to Delegate the Authority to Contract Awards | |
| **Report of** | Cabinet Member for Adult Care, Health and Public Service Reform | |

**Summary**

The Care at Home service supports the vulnerable people of Bury with their assessed needs under the Care Act 2014. This includes support with personal care, moving and handling, nutrition and hydration, and medication.

The Council spend on Care at Home in 2025/26 was c.£12.426m, the service supports approximately 700 people each day and delivers circa 10,000 hours of home care each week.

Care at Home contracts normally last approximately 5 years, the expenditure incurred over this period is significant and for this reason, the process of designing the specification and identifying providers is in depth, comprehensive, and lengthy.

The current service was commissioned in October 2021 for a period of 3 years with an option to extend by a further period or periods of up to 24 months provided that the total term of the contract does not exceed a total of 5 years.

The extension periods were granted by Cabinet in 2024 and 2025, and during the past 2 years the Community Commissioning Team has engaged with all key stakeholders:

- A 6-week public consultation ran from Monday 04 November to Sunday 15 December 2024 and the analysed consultation findings along with desktop research informed the updated service specification.
- Following pre-market engagement with providers on 09 December 2025, a further 3-week customer consultation ran from Monday 18 May to Sunday 07 June 2026 regarding a proposal to change the payment model.

The Community Commissioning Team and the Corporate Procurement Team are now in a strong position to run an open tender exercise under the Procurement Act 2023 with the Conditions of Participation stage already underway. The approval to commence this open tender process for a 5-year contract with the option to extend for a further 2-year period was approved by Cabinet in October 2025. The approval to delegate the authority to approve the service specification to the Director of Adult Social Services and Community Commissioning was also approved by Cabinet in October 2025.

**Recommendation(s)**

1. Delegate the authority to contract awards to the Director of Adult Social Services and Community Commissioning and the Executive Director of Health and Adult Care.
2. Delegate finalisation and sealing of the contracts to the Director of Law and Democratic Services in consultation with the Director of Adult Social Services and Community Commissioning and the Executive Director of Health and Adult Care.

**Reasons for recommendation(s)**

The Council has a legal duty to follow Procurement Law and fair purchasing processes and must complete a re-tender process to ensure compliance with the legislation (Procurement Act 2023). Additional benefits include a new contract and service specification with updated quality requirements enabling us to ensure high standards for the customers, clearer key performance indicators for robust contract monitoring, and a broader scope for innovation.

**Alternative options considered and rejected**

Alternative options are not applicable due to Procurement Law and the requirement to complete a re-tender exercise (Procurement Act 2023). Should the Council decide to do nothing, we would risk being non-compliant with the legislation.

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**Report Author and Contact Details:**

*Name: Stephanie Boyd*
*Position: Commissioning Manager*
*Department: Health and Care*
*E-mail: s.boyd@bury.gov.uk*

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**Background**

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

The key principles behind this service include reducing, preventing, and/or delaying the need for further care and support, promoting the statutory principle of individual wellbeing, and introducing positive behavioural change to encourage independence where possible in line with the Let's Do It! Strategy and a strengths-based approach to support.

The Council has a legal duty to follow Procurement Law and fair purchasing processes and must complete a re-tender process to ensure compliance with the legislation

(Procurement Act 2023). Additional benefits include a new contract and service specification with updated quality requirements enabling us to ensure high standards for the customers, clearer key performance indicators for robust contract monitoring, and a broader scope for innovation.

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**Links with the Corporate Priorities:**

In line with the Let's Do It! Strategy, the new Care at Home model will support people to live independently and well at home for as long as possible:

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

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

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

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

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**Equality Impact and Considerations:**

A full equality impact assessment has been completed. The analysis identifies the different characteristics of residents impacted and how they could be impacted through this procurement.

It's unlikely people using the service will see a change in service provision however anxieties in the continuity of the care providers/trusted relationships have been identified. Efforts will be made to minimise disruption and allay anxieties of people using this service ahead of any potential changes.

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**Environmental Impact and Considerations:**

The Care at Home model is streamlined across the 'zoned areas' to ensure unnecessary travel by providers does not take place. Part of the tender process will include a requirement for providers to demonstrate how they will support the Council's target to be carbon neutral by 2038. No direct impact on biodiversity.

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**Assessment and Mitigation of Risk:**

| Risk / opportunity | Mitigation |
|---|---|

| | |
|---|---|
| The Council will not be compliant with the Procurement Act 2023. | The Community Commissioning Team will maintain close communication with the Head of Procurement and Legal Services to ensure a robust plan is in place for compliance with the Procurement Act 2023. |
| Legal challenges from providers that are unsuccessful could result in delays to the process. | The re-tender process will include a vigorous process including 2 stages of evaluation and moderation to mitigate legal challenges as much as possible. |
| Delays to contract awards could result in the Council being 'out of contract' for a short time with incumbent providers. | Incumbent providers have a duty under their current contract (up to 12 months after the contract end date) to ensure a safe handover to new providers. |

**Procurement Implications:**

Procurement being run in compliance with the Procurement Act and currently at the Conditions of Participation evaluation stage. Contract anticipated to be awarded December 2026/January 2027.

**Legal Implications:**

Cabinet can delegate the contract award decision under the Council's Constitution and Scheme of Delegations. Approving the recommendation would enable the award decision to be made by the delegated decision maker within the parameters already agreed by Cabinet, and in accordance with the Council's Contract Procedure Rules. The delegated officer must ensure that the procurement has been conducted lawfully and in accordance with the published evaluation criteria. Delegation avoids the need to return to Cabinet and does not present additional risk, provided that the award is within the scope of the approvals already given.

**Financial Implications:**

The estimated annual expenditure associated with the Care at Home framework is approximately £12.426 million, equating to an estimated £62.130 million over the potential five-year contract term. As this is an activity-based contract, actual expenditure will vary according to demand levels for services and the impact of annual inflationary uplifts. Consequently, the values outlined represent current estimates rather than fixed contractual commitments.

The Adult Social Care budget continues to face significant financial pressures in 2026/27, requiring all commissioned services to demonstrate clear value for money and support the Council's wider financial objectives. The recommissioning of the Care at Home service therefore needs to secure a sustainable, high-quality model of provision that contributes to bringing expenditure back into alignment with the approved budget and supports delivery of the Council's Medium-Term Financial Strategy (MTFS) savings targets.

The recommission of Care at Home represents a key element of the Council's strategy for managing future demand and expenditure. While the new contractual arrangements are expected to deliver efficiencies and improved cost control, the principal financial benefit arises from enabling residents to remain safely within their own homes and communities, thereby reducing reliance on more costly forms of care provision, including residential and nursing placements.

Maintaining sufficient capacity within the Care at Home market is also critical to supporting timely hospital discharge and preventing unnecessary admissions to long-term care settings. Access to high-quality domiciliary care enables residents to maintain independence for longer, improves outcomes, and contributes to demand management across the wider health and social care system.

In addition, sufficient contracted Care at Home services reduce the need for spot purchasing arrangements, which typically attract higher hourly rates. The recommissioned service is therefore expected to deliver both financial and operational benefits whilst supporting improved outcomes for residents.

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**Appendices:**

Appendix 1: Equality Impact Assessment

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**Background papers:**

N/A

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**Equality Impact Analysis**

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

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

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

| | |
|---|---|
| **Name of Policy/Project/Decision** | Care at Home – Request to Delegate the Authority to Contract Awards |
| **Lead Officer (SRO or Assistant Director/Director)** | Adrian Crook (Director of Adult Social Services and Community Commissioning) |
| **Department/Team** | Health and Care |
| **Proposed Implementation Date** | N/A |
| **Author of the EqIA** | Stephanie Boyd (Commissioning Manager for Older People and Ageing Well) |
| **Date of the EqIA** | 04 August 2026 |

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

**Summary**

The Care at Home service supports the vulnerable people of Bury with their assessed needs under the Care Act 2014. This includes support with personal care, moving and handling, nutrition and hydration, and medication.

The Council spend on Care at Home in 2025/26 was c.£12.426m, the service supports approximately 700 people each day and delivers circa 10,000 hours of home care each week.

Care at Home contracts normally last approximately 5 years, the expenditure incurred over this period is significant and for this reason, the process of designing the specification and identifying providers is in depth, comprehensive, and lengthy.

The current service was commissioned in October 2021 for a period of 3 years with an option to extend by a further period or periods of up to 24 months provided that the total term of the contract does not exceed a total of 5 years.

The extension periods were granted by Cabinet in 2024 and 2025, and during the past 2 years the Community Commissioning Team has engaged with all key stakeholders:

- A 6-week public consultation ran from Monday 04 November to Sunday 15 December 2024 and the analysed consultation findings along with desktop research informed the updated service specification.
- Following pre-market engagement with providers on 09 December 2025, a further 3-week customer consultation ran from Monday 18 May to Sunday 07 June 2026 regarding a proposal to change the payment model. The analysed consultation findings along with desktop research and a separate Equality Impact Assessment will inform the recommendation to the Adult Social Care Senior Leadership Team in due course.

The Community Commissioning Team and the Corporate Procurement Team are now in a strong position to run an open tender exercise under the Procurement Act 2023 with the Conditions of Participation stage already underway. The approval to commence this open tender process for a 5-year contract with the option to extend for a further 2-year period was approved by Cabinet in October 2025. The approval to delegate the authority to approve the service specification to the Director of Adult Social Services and Community Commissioning was also approved by Cabinet in October 2025.

**Recommendation(s)**

1. Delegate the authority to contract awards to the Director of Adult Social Services and Community Commissioning and the Executive Director of Health and Adult Care.
2. Delegate finalisation and sealing of the contracts to the Director of Law and Democratic Services in consultation with the Director of Adult Social Services and Community Commissioning and the Executive Director of Health and Adult Care.

**Reasons for recommendation(s)**
The Council has a legal duty to follow Procurement Law and fair purchasing processes and must complete a re-tender process to ensure compliance with the legislation (Procurement Act 2023). Additional benefits include a new contract and service specification with updated quality requirements enabling us to ensure high standards for the customers, clearer key performance indicators for robust contract monitoring, and a broader scope for innovation.

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

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

Employees: No. The recommendations relate to potential changes for care at home providers and customers.
Community/Residents: Yes.
Third parties such as suppliers, providers, and voluntary organisations: Yes.

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

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

Advice from Corporate Procurement and Legal colleagues is that the Council will be compliant with the Procurement Act 2023.

Please see below for:

- Care at Home customer demographic data
- Summary of 6-week public consultation that ran from Monday 04 November to Sunday 15 December 2024

Data from Equality Impact Assessment for Care at Home Service Review completed in May 2024 (stage one of the re-tender process). Please note that the Care at Home data remains broadly stable.

| Protected Characteristic | Bury Population Data (from the JSNA) | Care at Home Customer Data (from Liquid Logic) |
|---|---|---|
| Age | Bury has 114,526 (59.1%) working age adults (18-64 years).<br><br>There are 35,447 (18.3%) older adults in Bury (65 years and over). | Age 18 to 64 – 183 (22.3%)<br><br>Age 65 to 74 – 119<br>Age 75 to 84 – 224<br>Age 85 and over – 294 (77.7%) |
| Disability | 19% of the population report having a disability. | Data unavailable. However, everybody receiving this service has Care Act eligible needs. |
| Gender Reassignment | The question on gender identity was new for Census 2021. It was a voluntary question only asked of those aged 16 years and over. The question asked, “Is the gender you identify with the same as your sex registered at birth?” with 3 answer options of Yes, No or to write in their gender identity. 94.4% of the population aged 16 years and over in Bury answered Yes. | Data unavailable. |
| Race | Asian, Asian British or Asian Welsh – 10.6%<br>Black, Black British, Black Welsh, Caribbean or African – 1.9% | African – 3 (0.37%)<br>Any other Asian background – 9 (1.1%)<br>Any other black background – 1 (0.1%)<br>Any other ethnic group – 4 (0.5%)<br>Any other mixed background – 1 (0.1%) |

| | | | | |
|---|---|---|---|---|
| | | Mixed or Multiple ethnic groups – 2.6%<br>Other ethnic group – 1.9%<br>White: English, Welsh, Scottish, Northern Irish or British – 78.2%<br>White: Other – 3.5% | Any other white background – 19 (2.3%)<br>Caribbean – 5 (0.6%)<br>English / Welsh / Scottish / Northern Irish / British – 697 (85%)<br>Irish – 8 (1%)<br>Not known – 45 (5.5%)<br>Not stated – 1 (0.1%)<br>Pakistani – 23 (2.8%)<br>White and Asian – 1 (0.1%)<br>White and Black Caribbean – 3 (0.37%) | |
| | Religion and Belief | Buddhist - 0.3%<br>Christian – 48.8%<br>Hindu – 0.5%<br>Jewish – 5.5%<br>Muslim – 9.9%<br>Sikh – 0.3%<br>Other religion – 0.3%<br>No religion – 29.4%<br>Not answered – 4.9% | Buddhist – 1 (0.1%)<br>Christian – 381 (46.5%)<br>Jewish – 33 (4%)<br>Muslim – 25 (3%)<br>None – 55 (6.7%)<br>Other – 23 (2.8%)<br>Sikh – 1 (0.1%)<br>Unknown – 301 (36.7%) | |
| | Sex | The population of Bury is 51% female and 49% male. | Female – 511 (62.3%)<br>Male – 309 (37.7%) | |
| | Sexual Orientation | The question on sexual orientation was new for Census 2021 and was voluntary only asked of those aged 16 years and over:<br>Heterosexual/Straight – 90.6%<br>Gay/Lesbian – 1.6%<br>Bisexual – 1%<br>All other sexual orientations – 0.3%<br>Not answered – 6.5% | Don’t know/refused – 66 (8%)<br>Gay/Lesbian – 4 (0.5%)<br>Heterosexual/Straight – 437 (53.3%)<br>Missing – 312 (38%)<br>Other – 1 (0.1%) | |

| | | | | |
|---|---|---|---|---|
| | | | | |
| | Carers | The percentage of people providing unpaid care in Bury is 9.2%. | Informal Carer (without an active carers support plan) – 331 (40.4%)<br>Formal Carer (with an active carers support plan) – 119 (14.5%) | |

**A 6-week public consultation ran from Monday 04 November to Sunday 15 December 2024:**

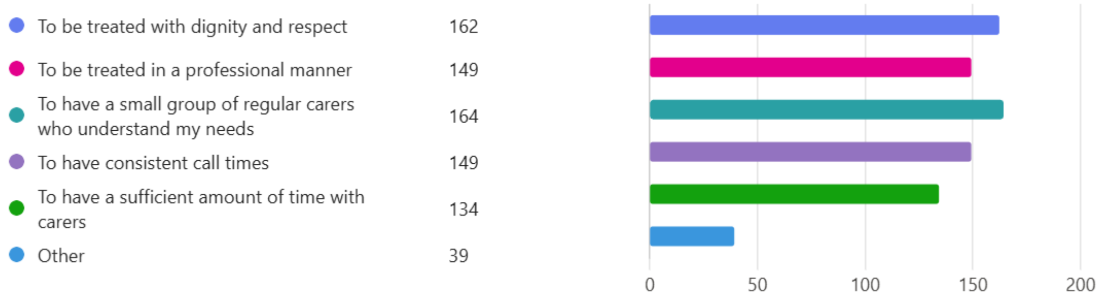
Commissioners wrote to all Care at Home customers asking them, along with family and friends, to complete a survey and offered the opportunity to attend consultation sessions, both online and face-to-face.

The same survey was open to Providers, Social Workers, Health Colleagues, Bury VCFA, Healthwatch, and other partner agencies. They too were offered the opportunity to attend online and face-to-face consultation sessions.

176 survey responses were received in total with the majority of respondents (53%) being a family member or friend.  Please see the chart below for a further breakdown:


When thinking about care at home, the top two most important things for people included being treated with dignity and respect and having a small group of regular carers who understand the person’s needs.

Please see the chart below for a further breakdown:




In addition, respondents highlighted many other areas of importance, such as continuity of care, and suggestions were made for service improvement. It was clear throughout the feedback that customers and family members need a better understanding of what Care Workers can and cannot do, and for expectations to be managed from an early stage.

The bullet points below provide an overview of the subjects that were discussed during the online and face-to-face consultation sessions:

- The need for new and improved Key Performance Indicators (KPIs)
- The potential need for a Lot 3 for people who have complex needs
- The potential need for the Trusted Assessor Model
- Discussions regarding whether 30-minutes should be the minimum call time for personal care
- Opportunities to run various pilots related to technology enabled care (TEC) and blended roles
- The need for a Customer Welcome Letter

The analysed consultation findings along with desktop research have informed the updated service specification. This was co-produced with key stakeholders, including the Chair of the Bury Older Peoples Network.

The Risk and Mitigation table below relates to the recommendations for Cabinet in September 2026:

1. Delegate the authority to contract awards to the Director of Adult Social Services and Community Commissioning and the Executive Director of Health and Adult Care.

2. Delegate finalisation and sealing of the contracts to the Director of Law and Democratic Services in consultation with the Director of Adult Social Services and Community Commissioning and the Executive Director of Health and Adult Care.

| **Risk / opportunity** | **Mitigation** |
|---|---|
| The Council will not be compliant with the Procurement Act 2023. | The Community Commissioning Team will maintain close communication with the Head of Procurement and Legal Services to ensure a robust plan is in place for compliance with the Procurement Act 2023. |
| Legal challenges from providers that are unsuccessful could result in delays to the process. | The re-tender process will include a vigorous process including 2 stages of evaluation and moderation to mitigate legal challenges as much as possible. |
| Delays to contract awards could result in the Council being 'out of contract' for a short time with incumbent providers. | Incumbent providers have a duty under their current contract (up to 12 months after the contract end date) to ensure a safe handover to new providers. |

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

- Could the proposal prevent the promotion of equality of opportunity or good relations between different equality groups?
- Could the proposal create barriers to accessing a service or obtaining employment because of a protected characteristic?
- Could the proposal affect the usage or experience of a service because of a protected characteristic?
- Could a protected characteristic be disproportionately advantaged or disadvantaged by the proposal?
- Could the proposal make it more or less likely that a protected characteristic will be at risk of harassment or victimisation?
- Could the proposal affect public attitudes towards a protected characteristic (e.g. by increasing or reducing their presence in the community)?
- Could the proposal prevent or limit a protected characteristic contributing to the democratic running of the council?

| **2.4 Characteristic** | **Potential Impacts** | **Evidence (from 2.2) to demonstrate this impact** | **Mitigations to reduce negative impact** | **Impact level with mitigations Positive,** |
|---|---|---|---|---|

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

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

| | | | | |
|---|---|---|---|---|
| | delivered by a different provider which will involve a transition (all customers will have a choice).<br><br>Transgender customers may have built up a relationship of trust with current care team. There may be some anxiety and uncertainty in protecting trans history and/or disclosing trans history to new care provider teams. | | is accessible. Providers will be asked to offer support to customers who need it.<br><br>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic.<br><br>Commissioners will work with customers and take a customer led approach to those who have a trans history to manage any transition (this would include or exclude trans history information depending on the persons choice).<br><br>Customers will also have the option for a direct payment to choose their provider, for example, a transgender person may have built up a relationship of trust with their carers and may wish to keep their current provider. | |
| **Marriage and Civil Partnership** | No evidence to suggest impact. | N/A | N/A | Neutral. |

| | | | | |
|---|---|---|---|---|
| **Pregnancy and Maternity** | No evidence to suggest impact. | N/A | N/A | Neutral. |
| **Race** | All customers will still receive the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice).<br><br>Potential Impact around language barriers during transition to new care team provider.<br><br>Impact in maintaining any cultural arrangements that may be in place with current care team. | Whilst there are some variations between Bury population data and Care at Home Customer data there is nothing to suggest a significant disproportionate impact. | Clear comms with all customers affected via a letter including e-mail address and phone number for any queries. This will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.<br><br>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, to support a protected characteristic (for example, female only carers for cultural reasons).<br><br>Where required a translation service is accessible to both commissioners and customers to assist in the communication of any transition in care team.<br><br>Customers will also have the option for a direct payment to choose their provider, for example, if they have | Neutral. |

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

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

| | | | | |
|---|---|---|---|---|
| | delivered by a different provider which will involve a transition (all customers will have a choice).<br><br>Customers may have built a relationship of trust with their care team around sexual orientation. A change in care team may cause some anxiety or uncertainty around 'coming out' and building trust with a new team. | a significant disproportionate impact. | is accessible. Providers will be asked to offer support to customers who need it.<br><br>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic.<br><br>Commissioners will work with customers and take a customer led approach to manage disclosure or non-disclosure of sexual orientation depending on the persons choice.<br><br>Customers will also have the option for a direct payment to choose their provider, for example, if they have built up a relationship of trust with their carers, particularly around sexual orientation, they may wish to keep their current provider. | |
| **Carers** | All customers will still receive the same level of support, but for | Disproportionate impact is expected due to the cohort of people who use care at home services. | Clear comms with all customers/carers affected via a letter including e-mail address and phone number for any queries. This | Neutral. |

| | | | | |
|---|---|---|---|---|
| | some it may be delivered by a different provider which will involve a transition (all customers will have a choice). | | will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.<br><br>Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic. Customers will also have the option for a direct payment to choose their provider, for example, if they have built up a relationship of trust with their current provider. | |
| **Looked After Children and Care Leavers** | No evidence to suggest impact. | N/A | N/A | Neutral. |
| **Socio-economically vulnerable** | No evidence to suggest impact. | N/A | N/A | Neutral. |
| **Veterans** | No evidence to suggest impact. | N/A | N/A | Neutral. |

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

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

| | | | |
|---|---|---|---|
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| | | | |

**Section 3 - Impact Risk**

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

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

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

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

| **3.2 Level of risk identified** | Low risk |
|---|---|

| | |
|---|---|
| **3.3 Reasons for risk level calculation** | A low risk level has been calculated for the following recommendations:<br><br>1. Delegate the authority to contract awards to the Director of Adult Social Services and Community Commissioning and the Executive Director of Health and Adult Care.<br>2. Delegate finalisation and sealing of the contracts to the Director of Law and Democratic Services in consultation with the Director of Adult Social Services and Community Commissioning and the Executive Director of Health and Adult Care.<br><br>The reasons for the low risk level are:<br><br>• Advice from Corporate Procurement and Legal colleagues is that the Council will be compliant with the Procurement Act 2023.<br>• All customers will still receive the same level of support, but for some it may be delivered by a different provider which will involve a transition (all customers will have a choice).<br>• Clear comms with all customers/carers affected via a letter including e-mail address and phone number for any queries. This will be checked by the Council's Comms Team to ensure it is accessible. Providers will be asked to offer support to customers who need it.<br>• Commissioners will support a smooth transfer by ensuring consent by the customer and all relevant paperwork in place for the new provider, particularly the support plan as this will include specific individual requirements, such as reasonable adjustments to support a protected characteristic. Customers will also have the option for a direct payment to choose their provider, for example, if they have built up a relationship of trust with their current provider. |

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

| 4.1 Analysis Decision | X | Reasons for This Decision |
|---|---|---|
| There is no negative impact therefore the activity will proceed | | |
| There are low impacts or risks identified which can be mitigated or managed to reduce the risks and activity will proceed | x | Bury Council must follow procurement rules and legislation. All customers will still receive the same level of support, but for some it may be delivered by a different provider. All customers will have a choice |

| | | |
|---|---|---|
| | | and reasonable adjustments will be made to support protected characteristics managed in a sensitive manner. |
| There are medium to high risks identified which cannot be mitigated following careful and thorough consideration. The activity will proceed with caution and this risk recorded on the risk register, ensuring continual review | | |

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

| 5.1 Sign Off | Name | Date | Comments |
|---|---|---|---|
| **Lead Officer/SRO/Project Manager** | S.Boyd | 04/08/2026 | |
| **Responsible Asst. Director/Director** | | | |
| **EDI** | L. Cawley | 05/08/2026 | QA Complete: The analysis identifies the different characteristics of residents impacted and how they could be impacted through this procurement. It's unlikely people using the service will see a change in service provision however anxieties in the continuity of the care providers/trusted relationships have been identified. Efforts will be made to minimise disruption and allay anxieties of people using this service ahead of any potential changes. |

**EqIA Revision Log**

| 5.2 Revision Date | Revision By | Revision Details |
|---|---|---|
| 17 Dec 2024 | S.Boyd | Previous EIA re the Care at Home Review was completed on 22 May 2024. The May document has been updated to reflect the Care at Home Re-Tender which is the next |

| | | |
|---|---|---|
| | | stage of the work. The considered impact on equality and protected characteristics has not changed. |
| 10 Sept 2025 | S.Boyd | The December 2024 document has been updated further to reflect the next stage of the re-tender process. |
| 04 August 2026 | S.Boyd | The September 2025 document has been updated further to reflect the next stage of the re-tender process. |
| | | |
| | | |

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

| Report to: | Cabinet | Date: 09 September 2026 |
|---|---|---|
| Subject: | Award of EVCI GM Contract to install EV chargepoints throughout Bury | |
| Report of | Cabinet Member for Environment, Climate Change and Operations | |

## CONFIDENTIALITY

1. The accompanying Part B report is confidential and must not be shared beyond key Local Authority personnel, in accordance with the Procurement Act 2023 requirements to protect bidder confidentiality and maintain the integrity of the procurement process.

## Summary


2. This report provides an update following the detailed paper presented to Cabinet in February 2025, which set out the background to the Local Electric Vehicle Infrastructure ("LEVI") programme and the proposed procurement approach. The procurement process has now been completed in full compliance with legislative requirements.

3. The purpose of this report is to update Cabinet on the outcome of this Local Electric Vehicle Infrastructure (LEVI) procurement process and to seek approval for Bury Metropolitan Borough Council ("the Council") to allow Transport for Greater Manchester ("TfGM") to proceed to contract award with the preferred supplier on behalf of itself (along with the other Greater Manchester local authorities).


## Recommendation(s)

4. Cabinet is recommended to agree TfGM on behalf of Bury Metropolitan Borough Council can proceed to award the contract to the Preferred Supplier identified within Part B of this report.

## Reasons for recommendation(s)

5. A competitive and transparent procurement process was undertaken in line with all legislative requirements governing local authority procurement. Following evaluation of all submissions against the agreed criteria, the Preferred Supplier identified within Part B of this report emerged as the highest-scoring bidder and

offered the best overall value to the Council. Their appointment is therefore proposed.

**Alternative options considered and rejected**

6. No alternative procurement routes were considered appropriate due to the contract value and scope. A competitive tendering process was required to meet internal contract procedures and all relevant procurement legislation.

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**Report Author and Contact Details:**

*Name: Chris Horth*
*Position: Unit Manager – Environment Team*
*Department: Corporate Core*
*E-mail: c.horth@bury.gov.uk*

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**Background**

7. The LEVI Project was launched by the Office for Zero Emission Vehicles (OZEV) to deliver a step change in the deployment of local electric vehicle charging infrastructure (EVCI) across England.

8. The LEVI programme objective is to encourage Chargepoint Operators (CPOs) to supply, install, and operate electric vehicle charging infrastructure (EVCI) in areas that are presently not commercially attractive, through the provision of subsidies. OZEV has recommended achieving this by utilising a concession contract. TfGM and all 10 GM Local Authorities are collaborating on this project, to maximise Charge Point Operators investment and reducing the number of tenders these operators would otherwise need to respond to. Electric Vehicle Charging Infrastructure is to be focused on areas lacking off-street parking or public chargepoints within a five-minute walk.

9. GM was awarded £16.158m from the government’s LEVI Fund, and Bury, Oldham and Rochdale have decided to include their City Region Sustainable Transport Settlement (CRSTS) allocation within the LEVI programme, which totals £1.751m (combined) towards the capital fund.

10. TfGM has been developing the contract strategy and tender pack collectively with all ten GM Local Authorities, in line with OZEV’s direction and guidance. Officers from Bury, Manchester, Stockport, and Trafford, represented the GM Authorities on the Tender Evaluation Panel.

11. Following the May 2026 local elections, potential conflicts of interest relating to the preferred supplier and nominated decision makers, together with the proposed governance route, have been checked with GM Chief Legal Officers. No conflicts of interest have been declared.

| Local Authority | Preferred Supplier Governance |
| --- | --- |
| Bolton | To be taken to cabinet in September 2026. |
| Bury | To be taken to cabinet in September 2026. |
| Manchester | Delegated to Treasurer. |
| Oldham | Delegated to Chief Executive, date yet to be confirmed. |
| Rochdale | Delegated to Portfolio holder. |
| Salford | To be taken to Procurement Board by City Mayor in September 2026. |
| Stockport | To be taken to cabinet in September 2026. |
| Tameside | To be taken to cabinet in September 2026. |
| Trafford | To be taken to Executives in September 2026. |
| Wigan | To be taken to cabinet in September 2026. |

**Introduction**

12. The route to market was a Competitive Flexible procedure under the new Procurement Act 2023, which included a two-stage process for a 20-year bespoke concession contract covering design, construction, operation, and maintenance. It is supported by an Authority Agreement, which establishes the formal relationship between the GM Authorities to be implemented upon contract award.

13. The top five shortlisted suppliers who scored the highest at the PSQ stage were taken forward to the main tender stage and their responses were received by the deadline of 16 December 2025. One shortlisted supplier decided not to proceed to main tender stage due to lack of resource.

14. After receiving the Main Tender responses and internal review of the LEVI procurement, TfGM identified that some aspects of the tender documentation and process required clarification and improvement to ensure that all shortlisted bidders were assessed on a clear and consistent basis, that solutions more closely matched TfGM's strategic aims and that bids were deliverable. These aspects related particularly to the installation period, the period of grant funding and the feasibility of implementation programmes having regard to TfGM and GM Local Authorities constraints.

15. Therefore, TfGM decided to rewind the procurement to the stage immediately following our Project Specific Questionnaire (PSQ) shortlisting and issued a clarified and amended Invitation to Tender to the existing shortlisted bidders in May 2026.

16. Following the decision to rerun the main tender, the top five shortlisted suppliers who scored the highest at the PSQ stage were taken forward to the main tender stage and their responses were received by the deadline of 29 June 2026. Two shortlisted suppliers decided not to proceed to main tender stage due to lack of resource or wider market challenges.

17. The key objective of the tender evaluation exercise was to recommend a preferred supplier who has the capability, capacity, economic and financial standing to deliver the LEVI programme of works in accordance with Bury's specification and timescales.

1.1 All evaluators (representatives from TfGM, Bury, Manchester, Stockport and Trafford) were briefed and completed an independent assessment of each tender response that was received against a pre-defined evaluation criteria that was published in the evaluation matrix. The scores were compiled and moderated with the results recommending that the Preferred Supplier identified within Part B of this report.

18. Once approved through GM Governance, TfGM will notify both successful and unsuccessful suppliers and publish the market notice, starting the eight-day standstill period. If there are no challenges, TfGM will finalise the contract with the Service Provider and GM Authorities.

**Next Steps**

19. The activity timeline below is indicative and dependant on the GM Authorities securing approval for the preferred supplier and impact of Mayoral Elections, which is set out in the table below.

| Activity | Deadline |
| --- | --- |
| Shortlisted Suppliers provide Main Tender Response | End Jun 2026 |
| Assess Main Tender to identify Preferred Supplier | End Jul 2026 |
| GM Briefing Note – Preferred Supplier | End Jul 2026 |
| GM Governance Approvals for Contract Award | Mid Oct 2026 |
| Notify Successful and Unsuccessful Suppliers | Mid Oct 2026 |
| Finalise Contract with Supplier and GM | End Oct 2026 |
| GM Authorities to sign Contract | End Oct 2026 |
| Service Provider Appointment | End Oct 2026 |

20. Successful delivery of the LEVI programme will require sustained support from all participating authorities throughout the implementation period. Authorities should ensure that appropriate governance, resourcing and processes are in place to support site approvals, permits, legal agreements and other activities necessary for deployment.

21. Concession Contract includes provisions relating to Compensation Events and Relief Events where circumstances beyond the Service Provider's control affect delivery. Delays in authority-led activities may require changes to deployment plans, extend delivery timescales and potentially affect the overall volume of infrastructure delivered within the programme period.

22. Such delays may also have contractual, financial and reputational implications for both individual local authorities and the wider Greater Manchester programme.

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**Links with the Corporate Priorities:**

**23. Supporting the borough's climate and carbon-reduction commitments**
Expanding electric vehicle charging infrastructure encourages the shift to cleaner lower carbon transport, helping to meet Bury's carbon neutral target improve air quality in line with Bury's environmental priorities.

**24. Improving neighbourhoods and tackling inequalities**
The focus on providing on street and near home chargepoints for residents without driveways improves access to EV charging for our residents who do not have access to off street parking. This helps to remove the inequalities in access to low carbon and cleaner personal transport. It is recognised that air quality is poorer in areas of higher deprivation, therefore reducing the impact of transport emissions as a result of a borough-wide modal shift towards electric vehicle usage will reduce emissions over time and ensure more equality across the borough.

**25. Strengthening local infrastructure and future-proofing communities**
Delivering reliable, modern charging infrastructure supports long-term economic and environmental resilience, aligning with the strategy's aim to build sustainable, well-connected places. Having a more accessible charging network will reduce demand on the limited public network currently seen in Bury, and will promote the borough to those who wish to stay, or move to the area therefore supporting the overall economy.

**26. Working collaboratively across Greater Manchester**
The joint procurement approach reflects the strategy's emphasis on partnership working, efficiency, and maximising value for residents.

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**Equality Impact and Considerations:**

The LEVI programme is expected to have a positive impact on equality by improving access to electric vehicle charging for residents without off-street parking, including those living in more densely populated or lower-income areas. The provision of on-street and near-home chargepoints helps reduce barriers to EV adoption and supports fairer access to low-emission transport options. No negative impacts on protected groups have been identified at this stage, and the project will always include accessibility, location suitability, and inclusive design as delivery progresses. As part of the procurement an Equalities Impact Assessment (EqIA) was developed by TfGM on behalf of all GM Authorities. This was reviewed by each LA as part of the contract reviews prior to issue of the tender documentation to the Suppliers. It will be the responsibility of the Supplier to update and maintain this throughout the lifetime of the contract.

**Environmental Impact and Considerations:**

The project will deliver significant carbon and environmental benefits by supporting the transition to cleaner, low-emission transport. Increasing the availability of local on-street chargepoints will make electric vehicle use more practical for residents without driveways, helping to reduce reliance on petrol and diesel vehicles. Over time, this shift will contribute to lower carbon emissions, improved local air quality, and reduced noise pollution across neighbourhoods. The programme also supports wider Greater Manchester and national climate commitments by enabling more residents to adopt zero-emission vehicles, particularly in areas where charging access is currently limited. As part of the procurement the Suppliers were provided with TfGM's Policy on Environmental and Sustainability criteria for Strategic Design, Development and Delivery and the associated tracker. This was agreed by each LA as part of the contract reviews prior to issue of the tender documentation. It will be the responsibility of the Supplier to complete the tracker and maintain this throughout the lifetime of the contract.

**Assessment and Mitigation of Risk:**

| **Risk / opportunity** | **Mitigation** |
|---|---|
| Accessibility concerns at specific chargepoint locations | Apply accessibility standards (e.g., PAS 1899 principles), highways review of each site, community engagement, ability to relocate or redesign sites before installation. |
| Supplier performance risk | Robust contract management, KPIs, performance monitoring, escalation routes, and clear contractual remedies. |
| Local community objections | Early engagement, clear communication, efficient reporting mechanisms, careful site selection, ability to adjust locations where appropriate. |
| Financial risk | Project is fully funded by grant funding and supplier own investment and because it is a concession should bring a revenue income |

| | |
|---|---|
| Procurement challenge risk | Fully compliant competitive tendering process, legal oversight, standstill period, clear audit trail. |
| Equality impact risk | EQIA completed, inclusive design, consultation, and site-specific mitigations. |
| Delivery delays due to external factors | Early coordination with utilities, phased delivery plan, contingency allowances. |
| Delivery delays arising from authority-led approvals, permits or legal agreements | Early confirmation of local governance, resourcing and approval processes; close coordination between TfGM, local authorities and the Service Provider; active monitoring of authority-led dependencies; and escalation where delays may trigger Compensation Event or Relief Event considerations, affect deployment volumes or create financial, contractual or reputational implications. |

**Procurement Implications:**

*Procurement compliant with the Procurement Act 2023*

**27.**

**Legal Implications:**

28. The procurement has been undertaken by Transport for Greater Manchester (TfGM) on behalf of the Greater Manchester authorities using the Competitive Flexible Procedure under the Procurement Act 2023. The report confirms that the procurement process has been conducted in accordance with the applicable legislative requirements and the Council's internal governance arrangements. Subject to Cabinet approval, TfGM will proceed to award the concession contract to the preferred bidder (identified within Part B of this report) following completion of the statutory standstill period and resolution of any procurement challenges that may arise.

29. TfGM and the participating Greater Manchester authorities will enter into the Authority Agreement and associated contractual documentation governing the delivery of the LEVI programme, The Council must be satisfied that the arrangements appropriately protect its interests, including provisions relating to governance, funding, liabilities, performance management and the operation of the concession over its term. The report also confirms that appropriate conflict of interest checks have been undertaken and no conflicts have been identified in relation to the procurement or decision-making process.

**Financial Implications:**

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

30. The cost of the proposal will be contained within the LEVI and CRSTS funding that is available to the council and therefore there are no additional financial implications.

**Appendices:**

*Please list any appended documents.*

**Background papers:**

Report to Cabinet  - 12 February 2025 - Electric Vehicle Charging Infrastructure - Supplier for LEVI and CRSTS Funding

Electric Vehicle Infrastructure Supplier for LEVI and CRSTS

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

| Term | Meaning |
|---|---|
| CPO | Charge point operator |
| CRSTS | City Region Sustainable Transport Settlement. |
| EVCI | Electric Vehicle Charging Infrastructure |
| EVI | Electric Vehicle Infrastructure |
| LEVI | Local Electric Vehicle Infrastructure |
| OZEV | Office for Zero Emission Vehicles |
| Project Specific Questionnaire (PSQ) shortlisting | Selecting only those suppliers who pass the initial eligibility checks to move forward in the procurement. |
| PSQ | Procurement Specific Questionnaire |

# Agenda Item 15

Bury Council

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

| | | |
|---|---|---|
| **Report to:** | Cabinet | **Date:** 09 September 2026 |
| **Subject:** | Approval for accepting the Department for Transport grant for the development of the 15112 Bury to Bolton Active Travel Corridor Scheme (Spenfold Lane Bridleway). | |
| **Report of** | Cabinet Member for Environment, Climate Change and Operations | |

## Summary


1. This report seeks formal approval to accept a grant supplied by the Department for Transport (“DfT”) and administered by Walk Wheel Cycle Trust (Company number 01797726) (“WWCT”) to deliver the 15112 Bury to Bolton Active Travel Corridor Scheme.

2. The scheme will improve the existing off-highway route between Ainsworth Road and Bolton Road, providing a safe alternative to the A58 corridor. The improvements will close a gap in the borough's off-highway active travel network, improving connections between key residential areas and contribute to the accessible continuity of the off-highway link between Bury town centre and Bolton. Additionally, the scheme ties in with the improvements to the National Cycle Network (NCN) which is a UK wide network of signed paths and routes for walking, wheeling, cycling and exploring the outdoors.

3. The scheme includes widening the existing footway and enhancing the surfacing, drainage and lighting provision, creating a safer, more accessible route that can be used by residents year-round.
This enhances the local public realm and provides options for residents who are unable to use the existing route due to its current condition. The scheme is integral to Bury’s local transport strategy by providing residents with accessible opportunities to engage in active travel. This increased participation in active travel contributes positively to improving health and wellbeing of local residents.

4. The total value of the grant to cover the schemes delivery is £553,000. This is fully funded through the grant provided by the DfT and administered by WWCT. The scheme is delineated into two sections: Phase 1 - 16009 Bellway Homes and Phase 2 - 15697 Hardmans Fold. Both phases will be constructed simultaneously as a singular package of work.

5. Both schemes have received business case approval from DfT based on analysis using the Active Mode Appraisal Toolkit (AMAT) alongside

information gathered by WWCT Research & Monitoring Unit. Phase 1 achieved a BCR value of 3.04 and Phase 2 a BCR value of 2.83. According to Active Travel England any scheme achieving a score above 2 is considered high value for money. (*Active Travel England, 2023)*

6. Approval of the Sub-Grant agreement will enable works to commence in October 2026 with completion scheduled for February 2027**,** ensuring compliance with funding conditions. Due to the source of the funding, there is a stipulation for all claims to be finalised prior to March 2027.

**Recommendation(s)**

7. Approve Bury Metropolitan Borough Council entering into the Sub-Grant agreement with Walk Wheel Cycle Trust (Company number 01797726) and subsequently the Department for Transport for the delivery of the 15112 Bury to Bolton Active Travel Corridor Scheme.

8. Authorise Legal to finalise and seal all the necessary contract documents to access the funding.

**Reasons for recommendation(s)**

9. The Sub￼Grant Agreement is required to enable the Council to accept and draw down the approved DfT funding for delivery of the schemes.

10. Failure to enter into the above agreement in a timely manner may jeopardise project delivery, risking funding withdrawal and impacting the Council's reputation with the Department for Transport.

**Alternative options considered and rejected**

11. .

12. Not proceeding with the schemes: This option was rejected as it would result in the loss of DfT funding and missed opportunities to improve local active travel infrastructure.

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**Report Author and Contact Details:**

*Name: Thomas Bland*
*Position: Assistant Project Engineer (Major Projects)*
*Department: Place Directorate*

*E-mail: t.bland@bury.gov.uk*

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**Background**

13. 15112 Bury to Bolton Active Travel Corridor Scheme focuses on enhancing local connectivity and supporting Burys transport strategy through widening the existing footway and upgrading the route with a improved sealed surface and enhanced drainage. The scheme features lighting provisions to improve safety for patrons using the route alongside the re classification of the route as a bridleway.

14. This scheme was developed to tie in with the recently improved Daisyfield Greenway ramp and improves the existing off-highway routing from Bury town centre to Bradley Fold/Bolton providing a safe, accessible and continuous alternative to the A58 corridor for local community members travelling actively.

15. 15112 Bury to Bolton Active Travel Corridor Scheme forms part of wider aspirations to enable delivery of the NCN 601 an orbital active travel route around Greater Manchester. Principally focussing on strengthening the connection between Bury and Bolton, currently both towns are situated on the NCN but there is no link between them.

16. These schemes have been developed in partnership with TfGM, DfT and ATE, they form part of Bury’s Local Transport Strategy, Greater Manchester’s Bee Active Network and the NCN which aim to improve health, reduce emissions, and encourage active travel

17. DfT has confirmed business case approval and requires the Council to enter into a Sub￼Grant Agreement setting out the terms and conditions relating to funding, programme delivery, monitoring, reporting and scheme completion. Approval of the agreement is therefore required before funding can be released and construction works progressed.

**Public Engagement**

18. Engagement with affected landowners has been undertaken as part of the scheme’s development, addressing matters relating to access and Japanese Knotweed treatment. Discussions with affected landowners have been productive and positive. Engagement will continue as the project progresses.

19. Public engagement is due to be undertaken following Cabinet approval for the scheme. This will feature an in-person event held at a suitable local space and will be advertised through all available

communication channels. Any relevant and achievable comments arising from the engagement sessions will be incorporated into the project's delivery. Throughout the delivery of the scheme the Council will work closely with local communities, residents and stakeholders, providing updates and opportunities for engagement as the project progresses.

**Social Value Considerations**

20. The successful contractor will be required to deliver a comprehensive package of social value outcomes aligned with the Council's Let's Do It Strategy and the Greater Manchester Social Value Framework. These commitments will be embedded throughout the delivery of the 15112 Bury to Bolton Active Travel Corridor Schemes.

**Key areas of focus include:**

- Local employment and apprenticeship opportunities for Bury residents
- Engagement with local schools, colleges, and NEETs through work placements and site visits
- Volunteering and support for community groups, charities, and small-scale local improvements
- Carbon reduction initiatives including electric vehicles, solar-powered facilities, and low-carbon materials
- Social value delivery monitored using the National TOMs framework and reported monthly to the Engineering Team.

21. These commitments will help ensure the schemes bring lasting benefits to the local area beyond the physical infrastructure improvements, contributing directly to Bury's priorities around inclusion, sustainability, and economic growth.

---

**Links with the Corporate Priorities:**

22. These schemes directly support the priorities outlined in Bury's Let's Do It Strategy, including:

- Local Neighbourhoods: Enhancing access to safe, active travel infrastructure fosters healthier, more independent, and cohesive communities.

- Delivering Together: Collaboration with DfT, WWCT, community stakeholders, and contractors demonstrates a commitment to co-design and shared accountability.

- Strength-Based Approach: Developing local assets and connectivity to amplify community strengths while advancing carbon neutrality goals.

- Economic Growth and Inclusion: Improved connectivity boosts local commerce, attracts investment, and supports inclusive growth within the borough.

- Climate Agenda: Promoting walking and cycling directly aligns with Bury's target of carbon neutrality by 2038.

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**Equality Impact and Considerations:**

23. A full equality impact assessment is appended to this report. The analysis has identified impacts which are wholly positive with this activity improving access and experience of use for a number of characteristics and circumstances

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**Environmental Impact and Considerations:**

24. These schemes will reduce vehicle dependency, promote sustainable travel, and contribute to Bury's target of carbon neutrality by 2038.

25. Biodiversity impacts have been assessed and mitigated during the design phase.

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**Assessment and Mitigation of Risk:**

| Risk / opportunity | Mitigation |
|---|---|
| Failure to enter into the Sub-Grant Agreement in a timely manner may prevent access to approved funding. | Approval and execution of the Sub-Grant Agreement will secure the funding arrangements with DfT |

---

**Procurement Implications:**

26. The total grant award of £553,000 is fully funded by the Department for Transport via Walk Wheel Cycle Trust.

27. The funding will be used to deliver all elements of the Spenfold Lane Bridleway scheme, including construction works, site establishment and preliminaries, drainage improvements, surfacing works, traffic management, design support, project management, supervision, environmental mitigation measures and appropriate contingency

allowances. There is no requirement for Council match funding and no impact on the Council's revenue budget.

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**Legal Implications:**

28. There is no express requirement within the Council's Operational Decision and Cabinet Process guidance for Cabinet approval solely for the acceptance of grant funding. The requirement for Cabinet approval is linked to whether the decision constitutes a Key Decision, namely where the value exceeds £500,000 or the decision is otherwise considered to have a significant impact. The guidance further confirms that non-key decisions may be taken by Chief Officers in accordance with the Officer Scheme of Delegation, Financial Regulations and Contract Procedure Rules, provided the decision is within an approved budget and does not amend existing policy or raise new policy issues. Accordingly, whilst Cabinet may elect to consider and approve the acceptance of grant funding where it considers it appropriate to do so, Cabinet approval is not considered to be a constitutional requirement where the decision falls within the relevant officer delegations and does not meet the Key Decision criteria. Therefore, Cabinet approval is permissible but not mandatory where the constitutional thresholds are not met.

29. Provided the decision-maker has the appropriate delegated authority, sufficient budget provision is available, and the grant funding and associated contractual commitments are accepted in accordance with the Council's governance framework, there are no legal impediments to the Council accepting the funding. Any funding agreement with TfGM and the resulting contract documents should be reviewed by Legal and executed in accordance with the Council's constitutional and contractual requirements.

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**Financial Implications:**

30. The scheme is to be fully grant funded and as such should have no implications for the council revenue budget.
31. There is no requirement to match fund the grant award to deliver the scheme.
32. Provisions are in place to ensure the schemes remain within the funding envelope through regular monitoring and mitigations including reducing scope will be applied should they be needed due to costs increases once in delivery.

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**Appendices:**

*Appendix A – Combined General Arrangement Drawings*

**Background papers:**

*Guidance note for local authorities to support completion of the active travel fund 4 proforma - GOV.UK*

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

| Term | Meaning |
|---|---|
| WWCT | Walk Wheel Cycle Trust |
| DfT | Department for Transport |
| ATE | Active Travel England |
| TfGM | Transport for Greater Manchester |
| AMAT | Active Mode Appraisal Toolkit |
| NCN | National Cycle Network |

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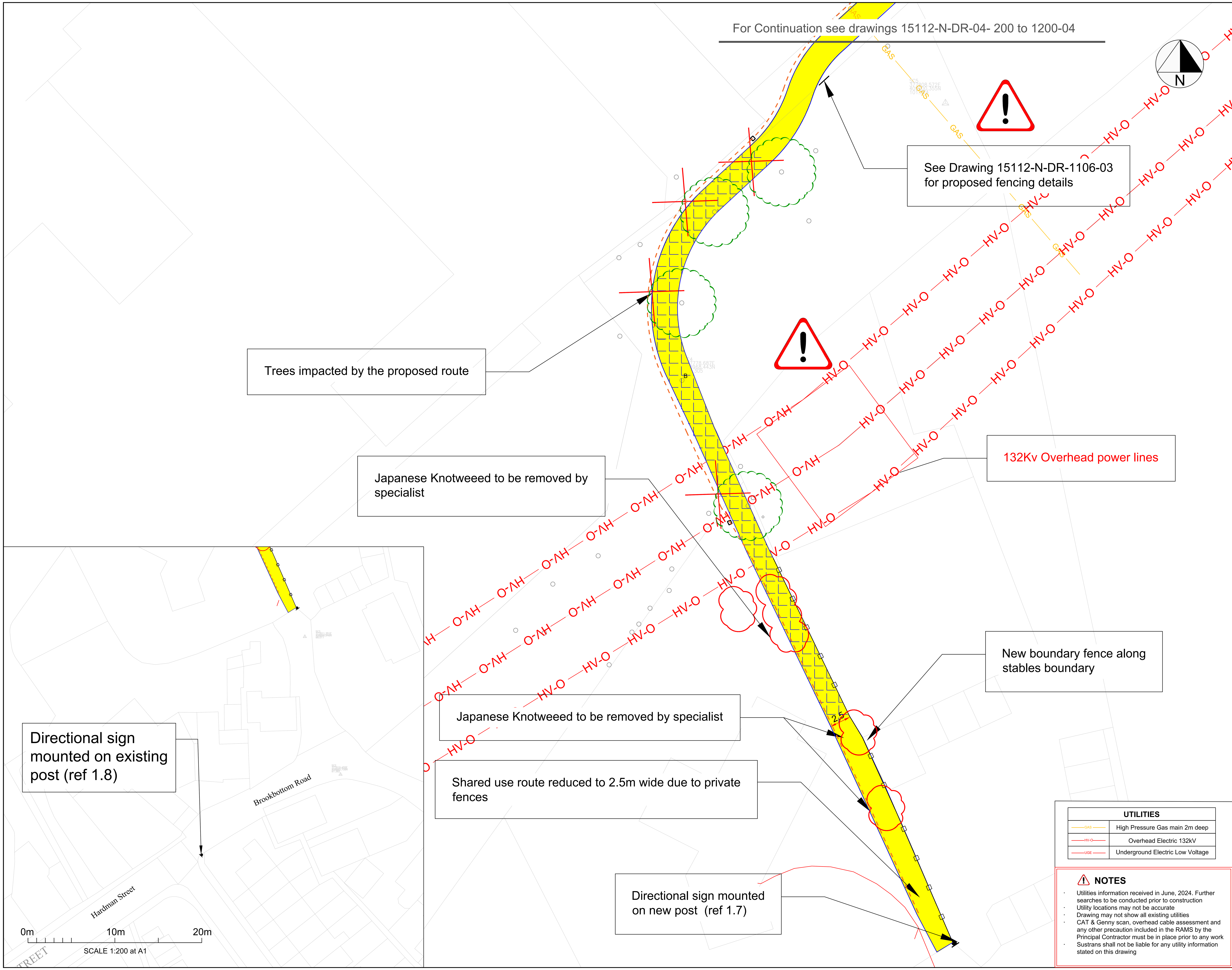



| UTILITIES | |
|---|---|
| GAS | High Pressure Gas main 2m deep |
| HV-O | Overhead Electric 132kV |
| UGE | Underground Electric Low Voltage |

## NOTES

- Utilities information received in June, 2024. Further searches to be conducted prior to construction
- Utility locations may not be accurate
- Drawing may not show all existing utilities
- CAT & Genny scan, overhead cable assessment and any other precaution included in the RAMS by the Principal Contractor must be in place prior to any work
- Sustrans shall not be liable for any utility information stated on this drawing

| Key | |
|---|---|
| | Shared use route no dig construction |
| | Shared Use Route |
| | Timber edgings |
| | Proposed Sign location |
| | Trees to be removed |
| | Proposed Boundary fence |
| | Knotweed to be treated by specialist |
| | Proposed post and rail fencing |
| | 100mm Orange duct |
| | 300x300 duct box |

Notes:

1. To be read in conjunction with drawing series 200 to 1200
2. Statutory undertaker services present in the vicinity of the works. For details of utility services see drawings 15112-N-DR-04-1103
3. All works in the vicinity of underground services to comply with HSG47
4. All works in the vicinity of overhead powerlines to comply with GS6 and look out-look up guidance.
5. Where ground levels may be proud or shy of new path construction, contractor to cut/fill locally at approximately 1:3 slope until meeting existing levels. ny such location to be agreed with the client
6. Exact positions of proposed features including bollards and sign posts to be set out and agreed with the client on site prior to installation.
7. All levels to be confirmed on site and any discrepancy communicated with the client
8. To be read in conjunction with drawing 15112-N-DR-04-1102

General Notes:

1. All dimensions in metres, unless otherwise noted.
2. Do not scale off plan.
3. Dimensions are to be checked by the contractor prior to commencement of work. Any discrepancy shall be reported immediately to WWCT.
4. Drawing based on topographical survey.
   Survey commissioned by: Bury Met Borough Council
   Survey carried out by: Bury Met Borough Council
   See drawing No.: 15112-N-DR-04-1104
5. Co-ordinates based on OS grid.
6. Levels based on OS datum (Newlyn).
7. This drawing is to be read in conjunction with all other relevant drawings and specifications.
8. All work shall be carried out in accordance with Bury Met. Borough Council statutory authority and health & safety requirements and regulations.
9. The position of services is based on information provided by other parties at the time of design and is for guidance only. It is the responsibility of the Client and Contractor to verify the exact position of any services before commencing works on site.
10. Temporary traffic works must be undertaken in accordance with Chapter 8 parts 1 & 2 of the Traffic Signs Manual, Safety at Street Works and Road Works Code of Practice 2013 and any other relevant H&S legislation.
11. These drawings have been produced under the CDM 2015 Regulations. The client is directed to their duties under Regulation 4 of CDM 2015.
12. The delivery of this drawing in electronic format shall not be construed to provide any authorisation or right of the recipient or any other person to rely upon, alter or otherwise use the information provided. Any use of this information is at the sole risk and liability of the user and WWCT assumes no liability for unauthorised use or alteration of the information contained herein.
13. To ensure the most up to date drawings are being used the project drawing register should be referred to.
14. For further information on drawing and design revisions, see decision log or contact Walk Wheel Cycle Trust's project manager.
15. This drawing has been produced to be read in colour, for the sheet size specified below. Printing or copying in black and white, or on a different sheet size may lead to misinterpretation of the design.

| Rev | Description | Drawn | Check | Appr | Date |
|---|---|---|---|---|---|
| A | | | | | |

Bury Council
34 Bradley Fold Rd, Ainsworth, BL2 6RS
0161 253 5000 www.bury.gov.uk

Project:
15697 ATE T8 Bolton to Bury Hardmans Fold

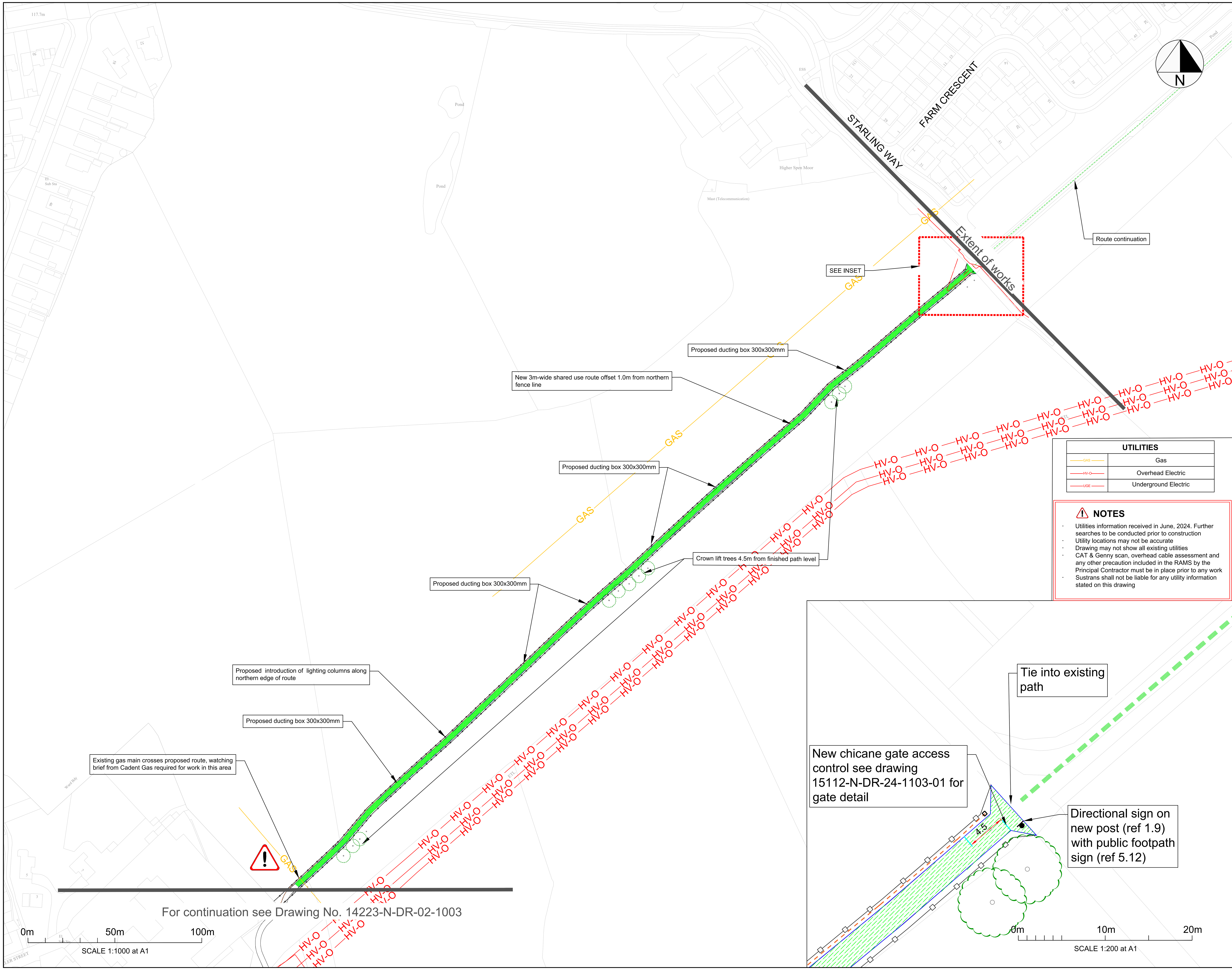
Title:
Hardman Fold General Arrangement

| Drawn: | Check: | Appr: | Date: | Scale at A1: |
|---|---|---|---|---|
| MC | MfB | RB | 27/01/2026 | 1:200 |

Status: FOR CONSTRUCTION

Drawing No: 15112-N-DR-04-GA03-1105

Revision: -




**UTILITIES**

| | |
|---|---|
| GAS | Gas |
| HV-O | Overhead Electric |
| UGE | Underground Electric |

**NOTES**

- Utilities information received in June, 2024. Further searches to be conducted prior to construction
- Utility locations may not be accurate
- Drawing may not show all existing utilities
- CAT & Genny scan, overhead cable assessment and any other precaution included in the RAMS by the Principal Contractor must be in place prior to any work
- Sustrans shall not be liable for any utility information stated on this drawing



**Key**

| | |
|---|---|
| | Footway construction as per standard path construction |
| | Proposed path edge |
| B | Proposed bollard |
| | Route continuation |
| | Proposed ducting |
| | Proposed Sign location |
| | Existing Fencing |
| | 300x300 duct box |
| B | Existing Bollard to remove |

Notes:

1. To be read in conjunction with drawing series 200 to 1200
2. Statutory undertaker services present in the vicinity of the works. For details of utility services see drawings 15112-N-DR-04-1103
3. All works in the vicinity of underground services to comply with HSG47
4. All works in the vicinity of overhead powerlines to comply with GS6 and look out-look up guidance.
5. Where ground levels may be proud or shy of new path construction, contractor to cut/fill locally at approximately 1:3 slope until meeting existing levels. any such location to be agreed with the client
6. Exact positions of proposed features including bollards and sign posts to be set out and agreed with the client on site prior to installation.
7. All levels to be confirmed on site and any discrepancy communicated with the client
8. Excavation of existing surface to a depth of 50mm
9. Existing timber edging to be removed prior to installation of new timber edging
10. Path to be off set 1m off the northern boundary fence

General Notes:

1. All dimensions in metres, unless otherwise noted.
2. Do not scale off plan.
3. Dimensions are to be checked by the contractor prior to commencement of work. Any discrepancy shall be reported immediately to Walk Wheel Cycle Trust.
4. Drawing based on OS base plan.
5. Co-ordinates based on OS grid.
6. Levels based on OS datum (Newlyn).
7. This drawing is to be read in conjunction with all other relevant drawings and specifications.
8. All work shall be carried out in accordance with Bury Met. Borough Council statutory authority and health & safety requirements and regulations.
9. The position of services is based on information provided by other parties at the time of design and is for guidance only. It is the responsibility of the Client and Contractor to verify the exact position of any services before commencing works on site.
10. Temporary traffic works must be undertaken in accordance with Chapter 8 parts 1 & 2 of the Traffic Signs Manual, Safety at Street Works and Road Works Code of Practice 2013 and any other relevant H&S legislation.
11. These drawings have been produced under the CDM 2015 Regulations. The client is directed to their duties under Regulation 4 of CDM 2015.
12. The delivery of this drawing in electronic format shall not be construed to provide any authorisation or right of the recipient or any other person to rely upon, alter or otherwise use the information provided. Any use of this information is at the sole risk and liability of the user and Walk Wheel Cycle Trust accepts no liability for unauthorised use or alteration of the information contained herein.
13. To ensure the most up to date drawings are being used the project drawing register should be referred to.
14. For further information on drawing and design revisions, see decision log or contact Walk Wheel Cycle Trust's project manager.
15. This drawing has been produced to be read in colour, for the sheet size specified below. Printing or copying in black and white, or on a different sheet size may lead to misinterpretation of the design.

| Rev | Description | Drawn | Check | Appr | Date |
|---|---|---|---|---|---|
| A | | | | | |

Bury Council
34 Bradley Fold Rd, Ainsworth, BL2 6RS
0161 253 5000 www.bury.gov.uk

Project:
16009 ATE T7 Bolton to Bury Bellway Homes

Title:
# Hardman Fold to Stirling Way General Arrangement Drawing

| Drawn: | Check: | Appr: | Date: | Scale at A1: |
|---|---|---|---|---|
| MC | MfB | RB | 27/01/2026 | 1:1000 |

Status: FOR CONSTRUCTION

| Drawing No: | Revision: |
|---|---|
| 15112-N-DR-04-GA04-1100 | - |

| Classification: Open | Decision Type: Non-Key |
|---|---|

| Report to: | Cabinet | Date: 09 September 2026 |
|---|---|---|
| Subject: | Corporate Plan Quarter 1 2026-27 Performance & Delivery | |
| Report of | Deputy Leader and Cabinet Member for Finance and Corporate Services | |

**Summary**


1. In April 2026, Cabinet approved the Council’s Corporate Plan for 2026-27. The Plan sets out the Council’s strategic priorities and delivery objectives for the financial year and our role in delivering the overarching vision of the borough’s LET’S Do It! Strategy.

   This report provides an overview of progress during Quarter One (April to June 2026). The Council has made a positive start to delivery of the 2026-27 Corporate Plan, of the Council's 31 objectives, 18 are on track, 12 are progressing with mitigating actions in place and one objective has been identified as a potential risk.

   Performance data presents a mixed but generally positive picture with improvements in a number of areas and pressures remaining in others. The quarter has also seen substantial visible delivery across the borough, with residents seeing progress on key initiatives, schemes and developments.


**Recommendation(s)**

2. Cabinet is asked to:
   - Note the Quarter One position on progress against the Corporate Plan 2026-27.

**Reasons for recommendation(s)**

3. To enable transparency and robust monitoring of performance and delivery of the Corporate Plan.

**Alternative options considered and rejected**

4. Not applicable.

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**Report Author and Contact Details:**


*Name: Sarah Hammersley*
*Position: Performance & Intelligence Manager*

*Department: Corporate Core*
*E-mail: s.hammersley@bury.gov.uk*

**Background**

5. The 2026/27 Corporate Plan was agreed by Cabinet in April 2026 and sets out the Council's strategic priorities and delivery objectives for the year. The final version of the Plan is available in the appendix.

**Links with the Corporate Priorities:**

6. This report supplements the LET's Do It! Outcomes Report in terms of providing further information on the contribution of the Council to the 2030 vision. The Corporate Plan priorities are linked to the seven objectives of the LET'S vision.

**Equality Impact and Considerations:**

7. An EIA was completed with the finalisation of the Corporate Plan for 2026/2027 ensuring inclusion was at the heart of it. The corporate plan is set out to improve outcomes for all residents with equity and inclusion threaded throughout. The plan has no negative impacts however activities within the plan will require individual EQIAs to ensure equity and inclusion is carried through from this plan into the activities and outcomes. This report demonstrates the continuing commitment to inclusion in all that we do as a Council.

**Environmental Impact and Considerations:**

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

**Assessment and Mitigation of Risk:**

| Risk / opportunity | Mitigation |
| --- | --- |
| Lack of capacity to deliver against the Corporate Plan priorities which reduces our ability to achieve the LET'S Vision | |

**Procurement Implications:**

9. No procurement implications

**Legal Implications:**

This is an updating report to Cabinet and is part of our governance assurance process, there are no direct legal implications arising from this report.

**Financial Implications**

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

**Appendices:**

Appendix One – Corporate Plan 2026/27 on a page

Appendix Two – Corporate Plan 2026/27 Q1 Delivery Summary

Appendix Three - Corporate Plan 2026-27 Q1 Performance Dashboards

**Background papers:**

Corporate Plan 2026-27 Cabinet Report

https://councildecisions.bury.gov.uk/documents/s49331/Corporate%20Plan%202026-27.pdf

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

| Term | Meaning |
|---|---|
| ASC | Adult Social Care |
| Best Start in Life | A programme focused on improving early childhood development and outcomes for children and families |
| CQC | Care Quality Commission |
| CRSTS | City Region Sustainable Transport Settlement |
| CVD | Cardiovascular Disease |
| EDI | Equality, Diversity and Inclusion |
| EIA / EQIA | Equality Impact Assessment |
| EV | Electric Vehicle |
| Family Hubs | Neighbourhood-based services bringing together support for children, young people and families |
| Finance Improvement Plan | The Council's programme to strengthen financial management, governance, systems and processes |
| GM | Greater Manchester |
| HR | Human Resources |
| LET'S Do It! | Bury's long-term community strategy and vision for the borough to 2030 |
| Live Well | A neighbourhood-based approach to improving wellbeing through community support, services and opportunities |
| NEET | Not in Education, Employment or Training |
| NHS | National Health Service |
| PDT | Performance, Delivery and Transformation Board |
| RAG | Red, Amber, Green performance status used to indicate progress and risk |
| SEND | Special Educational Needs and Disabilities |
| SEMH | Social, Emotional and Mental Health |
| STAR Chamber | Corporate challenge and assurance process used to review service performance, priorities and resources |
| TfGM | Transport for Greater Manchester |

| | |
|---|---|
| Unit4 | The Council's Enterprise Resource Planning (ERP) and finance system |
| VCFA | Voluntary, Community and Faith Alliance |
| YJS | Youth Justice Service |

## Corporate Plan 2026-27 Quarter 1 Performance & Delivery

### Executive Summary

Quarter 1 presents a positive start to delivery of the 2026-27 Corporate Plan. Of the Council's 31 objectives, 18 are on track, 12 are progressing with mitigating actions in place and one objective has been identified as a potential risk requiring close management and recovery action. Overall delivery remains strong across regeneration, planning, neighbourhood working and organisational development, although challenges remain in areas including housing demand, workforce wellbeing and transformation programmes.

Performance data presents a mixed but generally positive picture. Improvements can be seen in a number of children's indicators, homelessness prevention activity and customer contact performance. At the same time, pressures remain in housing, health inequality outcomes and staff sickness absence.

The quarter has also seen substantial visible delivery across the borough, with residents seeing progress on regeneration schemes, active travel infrastructure, housing quality initiatives, Live Well development, support for children and families, and community wellbeing programmes.

### Driving Inclusive Growth

Performance Assessment

Performance against this priority is strong, with 7 of the 10 objectives on track and no objectives identified as significant risks. Strategic planning, regeneration and infrastructure programmes continue to progress and provide the foundations for future housing, employment and transport outcomes.

Whilst many of the benefits from regeneration and infrastructure investment will take time to be reflected in outcome measures, Quarter 1 has seen continued progress across major growth programmes, including housing, transport infrastructure and place-based investment.

What We Have Delivered

- Significant milestones achieved in Quarter 1 include:
- Completion and handover of Market Chambers as part of the Radcliffe Hub development.
- Opening of the Radcliffe Enterprise Centre.
- Establishment of the Pride in Place Board and Chair.
- Approval of the Publication Local Plan by Cabinet.
- Adoption of the Elton Reservoir, Walshaw and Simister/Bowlee Development Frameworks.
- Continued progress on Whitefield and Ramsbottom Town Plans.
- Progression of the Waste Management Strategy and Sustainability Programme.

What Residents Will Have Seen

Residents will have seen tangible progress across the borough including:

- Reopening of Milltown Street Bridge, improving connectivity and active travel links within Radcliffe.
- Continued construction activity associated with the Prestwich Travel Hub and wider regeneration programme.
- Delivery and consultation on highways and active travel improvements across Bury, Ramsbottom, Fishpool and Pimhole.
- Ongoing investment in Radcliffe and Pride in Place activity.
- Continued town centre investment activity in Whitefield and Ramsbottom.

Key Risks and Exceptions

Three objectives remain amber.

The most significant relates to Prestwich regeneration, where planning validation, funding approvals and demolition activity have been affected by asbestos discovery and programme dependencies. Risks are being actively managed and mitigation plans are in place.

The establishment of the Atom Valley Mayoral Development Corporation has also been delayed by factors outside local control, although preparatory work continues.

**Improving Children's Lives**

Performance Assessment

Performance indicators show encouraging improvement across a number of important measures.

Quarter 1 saw:

- Continued reductions in Children Looked After.
- Child Protection Plans remaining significantly below the previous year.
- Reduced re-referrals into Children's Services.
- Increased participation in education, employment and training.

However, demand at the front door remains high, reflected in increasing Children in Need activity. In addition, several transformational programmes are progressing more slowly than originally planned.

What We Have Delivered

Key delivery achievements include:

- Continued implementation of SEND reforms.
- Progression of the Education and Inclusion Strategy.
- Delivery of Best Start in Life and Family Hub programmes.
- Progress towards expanding specialist educational provision and school capital programmes.
- Progression of Families First programme development.

What Residents Will Have Seen

Residents, children and families will have seen:

- Child Employment Month activity supporting young people and employers.
- Foster Care Fortnight recruitment activity.
- Continued Holiday Activities and Food Programme promotion and support.
- Serious youth violence prevention activity through the Bury Offer and partner programmes.
- School, wellbeing and family support initiatives delivered through neighbourhood and community settings.

Key Risks and Exceptions

Six objectives remain amber.

The principal delivery challenges relate to:

- Best Start in Life implementation.
- Family Hub development and mobilisation.
- Families First implementation.
- Establishment of the new Youth Justice Service.
- Children's residential provision and foster care development.

Whilst behind original profiles, all programmes have mitigation plans in place. The Best Start in Life implementation timeframes have slipped into the following quarter due to the review of the plan still underway at quarter end and the digital offer not yet finalised. Families First implementation will be back on track early quarter 2 when key documents have been agreed.

**Tackling Inequalities**

Performance Assessment

Performance is mixed.

Positive indicators include:

- Continued high proportion of social care providers rated good or outstanding by CQC
- Homelessness prevention activity reaching its highest level during the previous 12 months.
- A reduction in families placed in bed and breakfast accommodation compared with previous peaks.
- Stable level of effectiveness of short term services preventing further support requirements

However, significant pressures remain:

- Statutory homelessness activity continues to increase.

- Housing demand remains high.
- Wider health inequalities continue to present long-term challenges.
- Continued focus on reducing the median number of days waiting for an Adult Social Care needs assessment.

What We Have Delivered

Five objectives are on track and two are rated amber.

Key delivery achievements include:

- Continued development of Live Well in Whitefield and Radcliffe.
- Progression of employment and economic inactivity programmes.
- Health Inequalities Strategy implementation.
- Delivery of Adult Social Care transformation activity.

What Residents Will Have Seen

Residents will have seen:

- Housing quality campaigns focused on damp, mould and condensation.
- Cancer awareness and early diagnosis campaigns.
- Walking and physical activity initiatives, including the GM Walking Festival and Bury Running Festival.
- Carers Week activity and wider inclusion campaigns.
- Community safety and prevention activity delivered with partners.
- Continued development of Live Well services and neighbourhood-based support.

Key Risks and Exceptions

Amber-rated objectives relate primarily to:

- Housing Strategy development.
- Homelessness Strategy development.
- Neighbourhood integration activity.

Housing demand and associated service pressures remain the most significant challenge under this priority.

**Organisational Enablers**

Performance Assessment

Performance remains broadly positive, although one objective has been identified as presenting a significant delivery risk.

Positive indicators include:

- Staff turnover remaining within expected local government norms.
- Reduced contact centre demand, suggesting greater use of digital and self-service channels.
- Improved contact centre responsiveness.

However:

- Sickness absence continues to increase; this pattern has been observed across GM authorities with Bury rates comparable to peer councils. In line with the national picture, the largest single cause of absences is mental health.
- The People & Inclusion team review absence data on a monthly basis, and support management to take action to support colleagues, a wider review of the wellbeing support offer to our workforce is ongoing.
- This reflects a wider trend being experienced across the UK labour market and public sector, although it remains an important workforce challenge requiring continued focus locally.

What We Have Delivered

Quarter 1 achievements include:

- Delivery of the 2026-27 budget.
- Completion of STAR Chamber reviews.
- Progression of the Workforce Strategy and People Plan.
- Completion of reviews of the corporate and commercial estate.
- Continued delivery of Equality, Diversity and Inclusion programmes, drafting a Dignity at Work policy and establishing protected time for staff to attend employee group meetings and the roll out of neurodiversity training for managers that will support staff and residents.

What Residents Will Have Seen

- Whilst much of this activity is organisational, residents will have experienced:
- Delivery of local elections and democratic processes.
- Continued investment in digital services and customer access arrangements.
- Progress on organisational improvement programmes designed to support more efficient service delivery.

Key Risks and Exceptions

The Finance Improvement Plan remains the Council's only objective where a significant delivery risk has been identified.

Delays to Unit4 implementation and associated transformation activity have affected programme delivery and require focused recovery activity during Quarter 2.

The Digital Roadmap remains amber, reflecting delays to the Housing QL project.

**Key Issues for Cabinet Oversight During Quarter 2**

Cabinet is asked to note the following areas which will require continued focus:

Delivery of the Finance Improvement Plan and Unit4 implementation, where risks to programme delivery have been identified and recovery plans are being developed.

Recovery of milestones within Best Start in Life, Family Hubs, Families First and Youth Justice programmes.

Housing demand and homelessness pressures.

Workforce wellbeing and rising sickness absence.

Progression of key dependencies within the Prestwich regeneration programme.

**Conclusion**

Quarter 1 demonstrates a positive start to delivery of the 2026-27 Corporate Plan.

Performance has improved across several key measures, particularly within Children's Services, homelessness prevention and customer services. Significant progress has also been achieved across regeneration, planning, neighbourhood development and organisational improvement activity.

Residents are seeing visible investment across the borough through regeneration, highways improvements, Live Well development, support for children and families, housing quality initiatives and community wellbeing programmes.

Whilst challenges remain around housing demand, workforce wellbeing and transformation delivery, the overall Quarter 1 position remains stable, with the majority of objectives either on track or progressing with mitigating actions in place. The majority of identified risks are being actively managed through existing programme and governance arrangements.

# Appendix One: Corporate Plan 2026-27 on a page

**2030 Vision**

**Achieving Inclusive Economic Growth and Reducing Deprivation**

**LET'S Values & Behaviours**

## Council Priorities and Key Objectives – LET'S do it! 2026-27

### Driving Inclusive Growth

- Open the **Radcliffe Hub**, **Radcliffe Enterprise Centre** and **STAR Academy High School**; progress the delivery of brownfield housing at East Lancashire Paper Mill; deliver CRSTS[1] funded transport infrastructure improvements and the plan for **Pride in Place**.
- Complete Phase 1A (Travel Hub) of the **Prestwich** Village Regeneration Scheme and progress of Phase 1B (commercial and community space) to secure planning permission, demolish the Longfield Centre and start on site with delivery of the commercial and residential phase.
- Launch the **Atom Valley Northern Gateway Mayoral Development Corporation** to progress the first phase of employment land and advance the **Western Access** highways infrastructure.
- Update and progress the **Bury town centre masterplan**, including opening **Casewells** (Flexi Hall); supporting the TfGM rebuild of the **Bury Interchange** and advancing residential development across **Mill Gate**, the South of Markets area and **Pyramid Park**.
- Following consultation, approve the **Bury Local Plan** subject to government examination.
- Consult on, and adopt, the development frameworks for **Elton Reservoir, Walshaw** and **Simister/Bowlee**. Advance infrastructure planning to support future development to deliver around 6,000 new homes.
- Progress the delivery of the **Whitefield and Ramsbottom Town Plans** and make use of Economic Development Regeneration Grant Funding to improve public realm, increase footfall and create vibrant town centres.
- Deliver our **Annual Sustainability Plan and Climate Change Strategy** including EV[2] Charging point network and exploring design stage options for a Heat Network in Bury Town Centre.
- Create a new **Waste Management Strategy** to increase recycling rates and meet national reforms.
- Develop a borough-wide **Parking Strategy** that addresses capacity and cost across each neighbourhood.

### Improving Children's Lives

- Implement **Best Start in Life** including delivery of the local plan to improve Good Levels of Development.
- As part of our 2030 commitment to establish a family hub in every neighbourhood, in this year we will step up **family hub delivery** at the LiveWell centre in **Whitefield** and from the **Radcliffe** Hub.
- Deliver the **Families First** Partnership Programme by restructuring our support services, establishing **Family Help** teams and multi-agency child protection teams to deliver an end-to-end model of support to children and families.
- Strengthen the **school led improvement system** by engaging all education settings in Bury to improve outcomes for children.
- Transform and improve how we support **children with additional educational needs and disabilities** in Bury by implementing the national SEND reforms in partnership with NHS and education providers.
- Build **new schools** Ashgrove (PRU), Redvales (SEMH primary) and increase specialist sufficiency within existing schools to provide enough high-quality and financially sustainable places in local settings to meet demand.
- Establish a bespoke adolescent offer incorporating the return of **Youth Justice** services to Bury.
- Increase the number and quality of local family-based and **residential homes** for children in care.

### Tackling Inequalities

- Accelerate **team working** maturity in each of our 5 neighbourhoods, connecting to the NHS reform programme of neighbourhood working in adults and designing multi-agency working in children's services.
- Implement **Live Well in Whitefield** including the Live Well Centre operating by July 2026 and supporting voluntary sector infrastructure and investment in community capacity building.
- Develop **Live Well in Radcliffe** connected to the hub opening, investment in the primary care centre and aligned to the family hub, and working with the Voluntary Community Faith Alliance (VCFA) to implement the Bury Fund to strengthen voluntary and community sector capacity.
- Increase **working age employment** rates by implementing Work Well, NEET-reduction activity and the Economic Inactivity Trailblazer.
- Reshape Bury's **Housing Strategy** to include increased quality of social and private housing, delivery of more affordable housing and improvements in homelessness prevention and support.
- Implement the **Bury health inequalities strategy** including focus on tobacco control, physical activity, CVD[3] prevention, and screening and immunisation uptake, and report progress.
- **Deliver Adult Social Care Business and transformation plan** reflecting learning from the CQC[4] review and with a further focus on strengths-based working, co-production and user engagement.

### Enablers

- Deliver the **2026/27 Budget** and develop a strategy for Medium Term Financial Sustainability.
- Complete the **Finance Improvement Plan** through implementing the finance restructure and new procurement operating model, achieving the upgrade of Unit 4 (core finance system) upgrade, and strengthened governance.
- Develop a **Workforce Strategy** to drive high performance, talent management and improved HR policies and processes.
- Implement the **Digital Roadmap** including upgrades to Unit 4; Liquid Logic and Housing QL systems and develop a strategy for appropriate use of Artificial Intelligence to improve productivity.
- Finalise the **Estates Strategy** for the improvement of operating our corporate and commercial estate.
- Progress **Equality, Diversity & Inclusion** priorities through becoming a neuro inclusive employer; championing anti-racism and promoting community cohesion.

**Appendix Two: Corporate Plan 2026-27 Q1 Delivery Summary**

| Key: | On track - all milestones achieved | Not on track - risk addressed | Not on track - risk identified |
|---|---|---|---|

| Obj. Ref. | Priority | Objective | Quarter 1 Objective RAG Rating |
|---|---|---|---|
| 1 | Driving Inclusive Growth | Open the Radcliffe Hub, Radcliffe Enterprise Centre and STAR Academy High School; progress the delivery of brownfield housing at East Lancashire Paper Mill; deliver CRSTS funded transport infrastructure improvements and the plan for Pride in Place. | |
| 2 | Driving Inclusive Growth | Complete Phase 1A (Travel Hub) of the Prestwich Village Regeneration Scheme and progress Phase 1B (commercial and community space) to secure planning permission, demolish the Longfield Centre and start on site with delivery of the commercial and residential phase. | |
| 3 | Driving Inclusive Growth | Launch the Atom Valley Northern Gateway Mayoral Development Corporation to progress the first phase of employment land and advance the Western Access transportation infrastructure. | |
| 4 | Driving Inclusive Growth | Update and progress the Bury town centre masterplan, including opening Casewells (Flexi Hall); supporting the TfGM rebuild of the Bury Interchange and advancing residential development across Mill Gate, the South of Markets area and Pyramid Park. | |
| 5 | Driving Inclusive Growth | Consult on the Publication Local Plan and submit to the Secretary of state | |
| 6 | Driving Inclusive Growth | Review and take to Cabinet for approval and adoption the development frameworks for Elton Reservoir, Walshaw and Simister/Bowlee. Advance infrastructure planning to support future development to deliver around 6,000 new homes. | |

| | | | |
|---|---|---|---|
| 7 | Driving Inclusive Growth | Progress the delivery of the Whitefield and Ramsbottom Town Plans and make use of Economic Development Regeneration Grant Funding to improve public realm, increase footfall and create vibrant town centres. | |
| 8 | Driving Inclusive Growth | Deliver our Annual Sustainability Plan and Climate Change Strategy including EV charging point network and exploring design stage options for a Heat Network in Bury Town Centre. | |
| 9 | Driving Inclusive Growth | Create a new Waste Management Strategy to increase recycling rates and meet national reforms. | |
| 10 | Driving Inclusive Growth | Develop a boroughwide Parking Strategy that addresses capacity and cost across each neighbourhood. | |
| 11 | Improving Children's Lives | Implement Best Start in Life including delivery of the local plan to improve Good Levels of Development. | |
| 12 | Improving Children's Lives | As part of our 2030 commitment to establish a family hub in every neighbourhood, step up family hub delivery at the Live Well centre in Whitefield and from the Radcliffe Hub. | |
| 13 | Improving Children's Lives | Deliver the Families First Partnership Programme by restructuring our support services, establishing Family Help teams and multi-agency child protection teams to deliver an end-to-end model of support to children and families. | |
| 14 | Improving Children's Lives | Strengthen the school led improvement system by engaging all education settings in Bury to improve outcomes for children. | |
| 15 | Improving Children's Lives | Transform and improve how we support children with additional educational needs and disabilities in Bury by implementing the national SEND Reforms in partnership with NHS and education providers | |
| 16 | Improving Children's Lives | Build new schools Ashgrove (AP Academy), Willow Grove (Redvales SEMH secondary) and increase specialist sufficiency within existing schools to provide enough high-quality and financially sustainable places in local settings to meet demand. | |

| | | | |
|---|---|---|---|
| 17 | Improving Children's Lives | Establish a bespoke adolescent offer incorporating the return of Youth Justice services to Bury. | |
| 18 | Improving Children's Lives | Increase the number and quality of local family-based and residential homes for children in care. | |
| 19 | Tackling Inequalities | Accelerate team working maturity in each of our 5 neighbourhoods, connecting to the NHS reform programme of neighbourhood working in adults and designing multi-agency working in children’s services. | |
| 20 | Tackling Inequalities | Implement Live Well in Whitefield including the Live Well Centre operating by July 2026 and supporting voluntary sector infrastructure and investment in community capacity building. | |
| 21 | Tackling Inequalities | Develop Live Well in Radcliffe connected to the hub opening, investment in the primary care centre and aligned to the family hub, and working with the Voluntary Community Faith Alliance (VCFA) to implement the Bury Fund to strengthen voluntary and community sector capacity. | |
| 22 | Tackling Inequalities | Increase working age employment rates by implementing Work Well, NEET reduction activity and the Economic Inactivity Trailblazer. | |
| 23 | Tackling Inequalities | Develop a new Bury Housing Strategy to include increased quality of social and private housing, delivery of more affordable housing and improvements in homelessness prevention and support. | |
| 24 | Tackling Inequalities | Implement the Bury health inequalities strategy including focus on tobacco control, physical activity, CVD prevention, and screening and immunisation uptake and report progress. | |
| 25 | Tackling Inequalities | Deliver Adult Social Care Business and transformation plan reflecting learning from the CQC review and with a further focus on strengths-based working, co-production and user engagement. | |

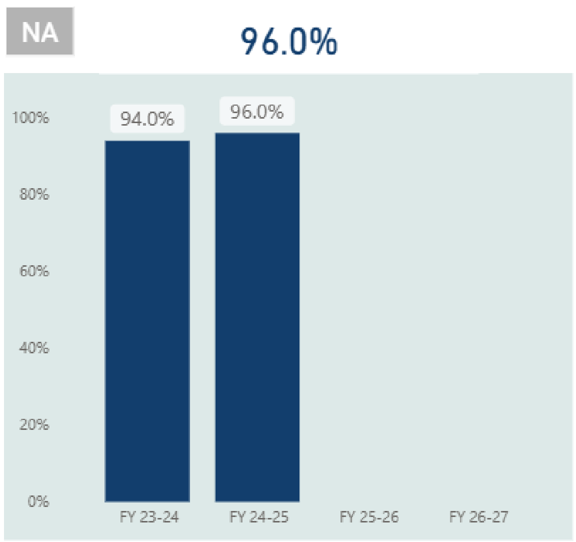
| | | | |
|---|---|---|---|
| 26 | Enablers | Deliver the 2026/27 Budget and develop a strategy for Medium Term Financial Sustainability. | |
| 27 | Enablers | Complete the Finance Improvement Plan through implementing the finance restructure and new procurement operating model, achieving the upgrade of Unit 4 (core finance system) and strengthened governance. | |
| 28 | Enablers | Develop a Workforce Strategy to drive high performance, talent management and improved HR policies and processes. | |
| 29 | Enablers | Implement the Digital Roadmap including upgrades to key business systems; Unit 4, Liquid Logic, Controcc, iTrent and Housing QL systems and develop a strategy for appropriate use of Artificial Intelligence to improve productivity. | |
| 30 | Enablers | Finalise the Estates Strategy for the improvement of operating our corporate and commercial estate. | |
| 31 | Enablers | Progress Equality, Diversity & Inclusion priorities through becoming a neuro inclusive employer; championing anti-racism and promoting community cohesion. | |

## Appendix Three: Corporate Plan 2026-27 Q1 Performance Dashboards

Driving Inclusive Growth

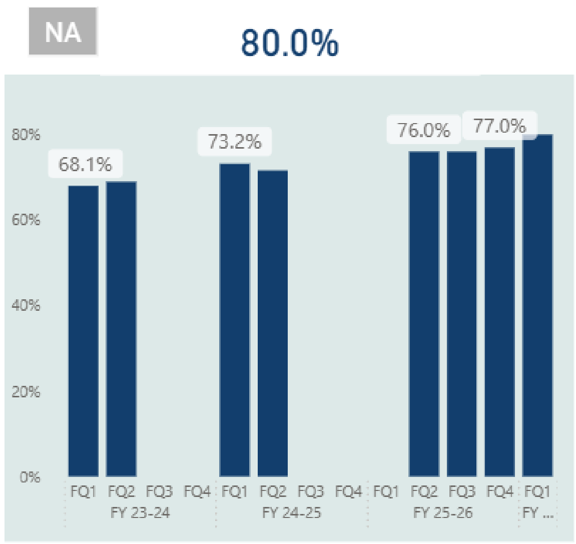
% Housing completions on brownfield land boroughwide

High is good



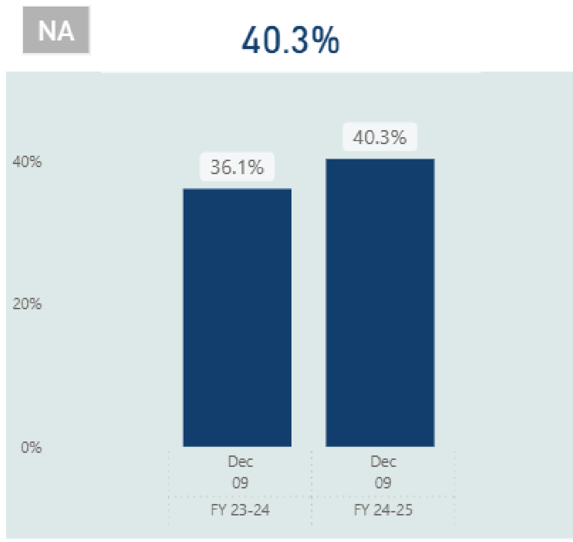

% of street lighting converted to LED

High is good




Energy efficiency of housing in the borough (% Band A-C)

High is good

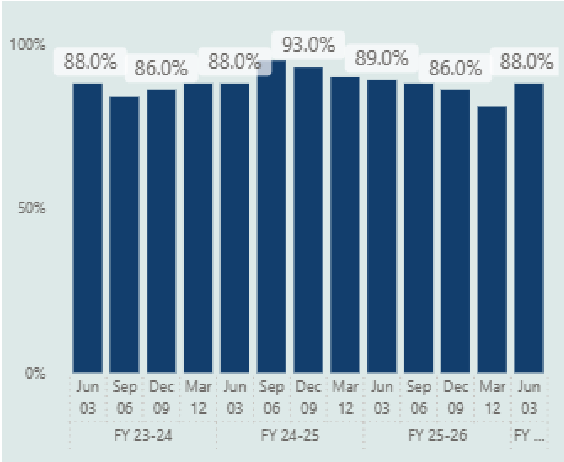


% of planning decisions granted

NA

NA

88.0%

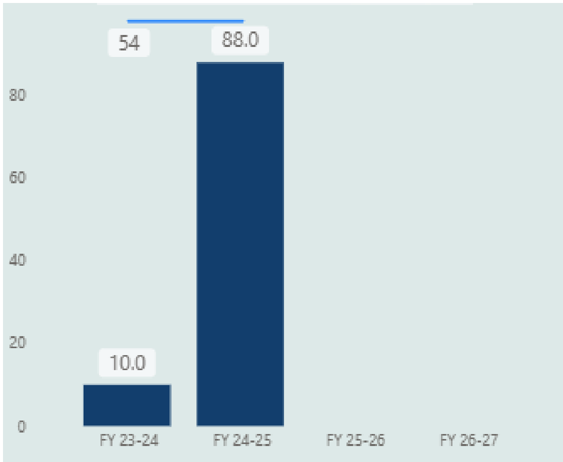



Number of housing units completed in the borough which are affordable

High is good

G

88.0

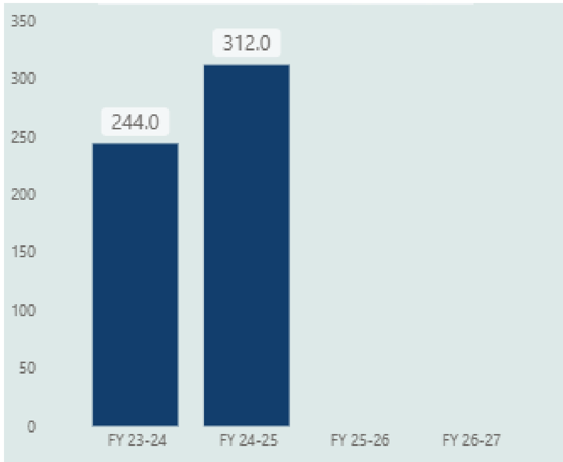



Annual housing completions boroughwide

NA

NA

312.0

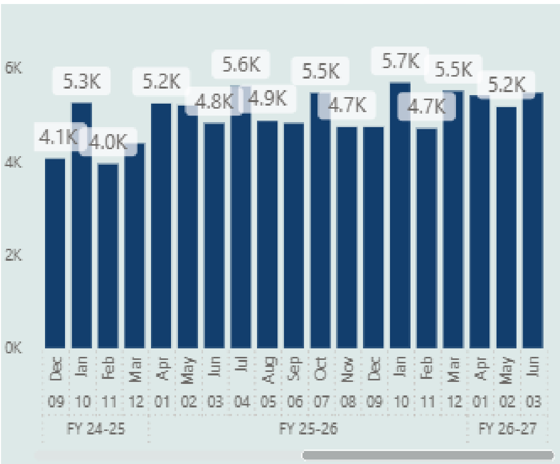



Waste Collection (tonnes)

NA

NA

5482.2

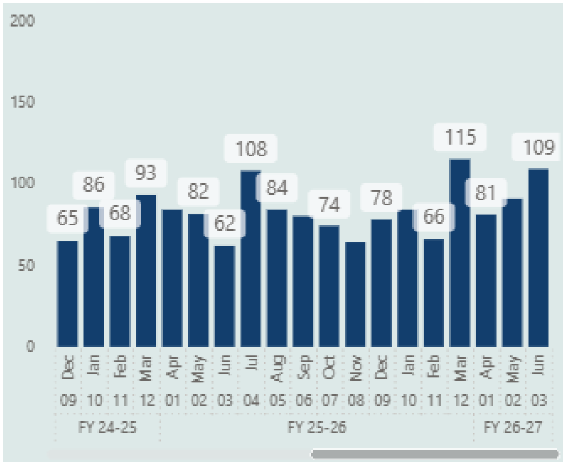



Number of missed bin collections per 100,000

Low is good

NA

109.0

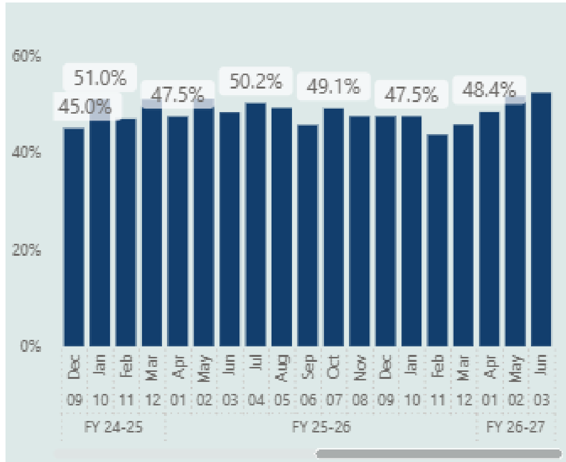



Proportion of household waste recycled

High is good

NA

52.4%

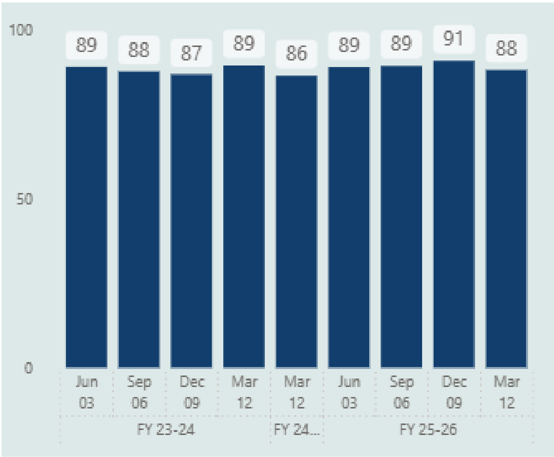


The amount (tonnes) of residual household waste per household

NA

NA

88.2

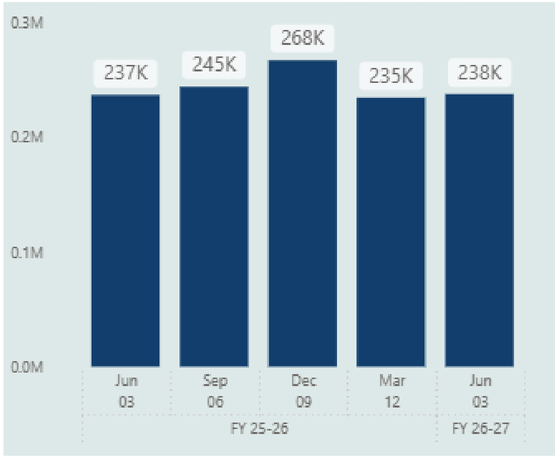



Market footfall - number of people attended Bury Market (fish and meat hall)

High is good

NA

238.1K

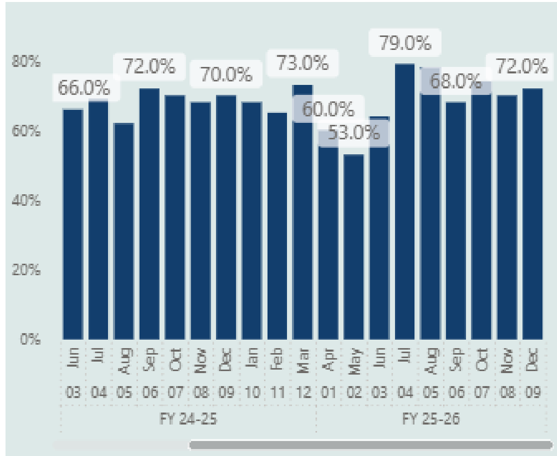



Highway repairs completed on time (%)

High is good

NA

72.0%

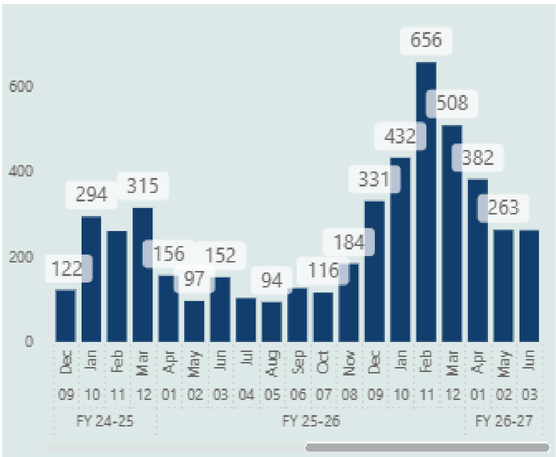



Number of potholes reported

NA

NA

262.0

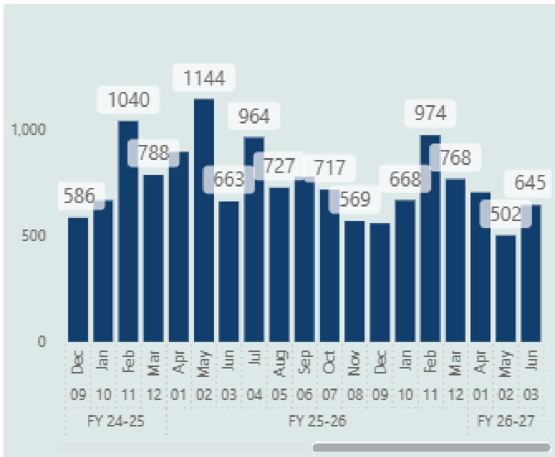



Number of potholes repaired

NA

NA

645.0

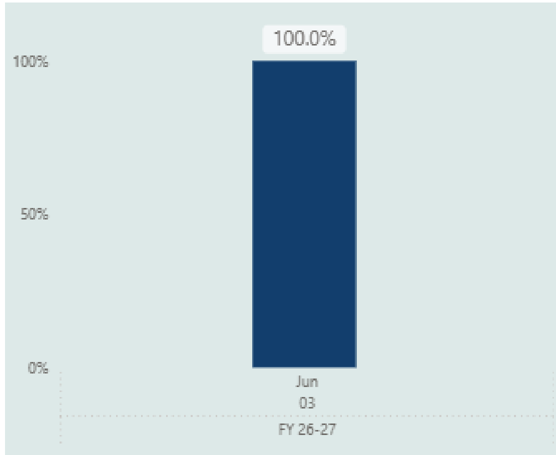



Percentage of all major development planning applications decided within 13 weeks or agreed time

NA

NA

100.0%

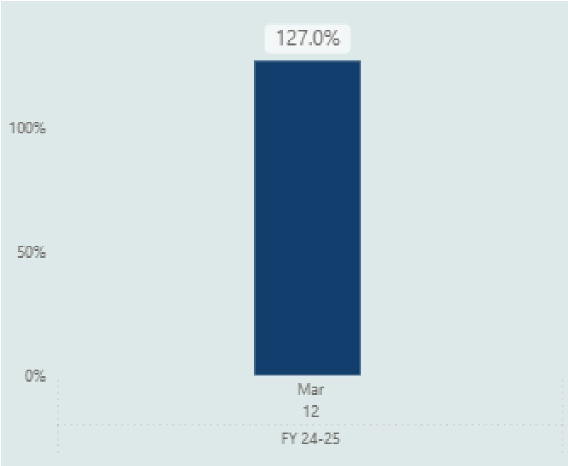


Housing delivery against Local Plan target (%)

High is good

NA

127.0%



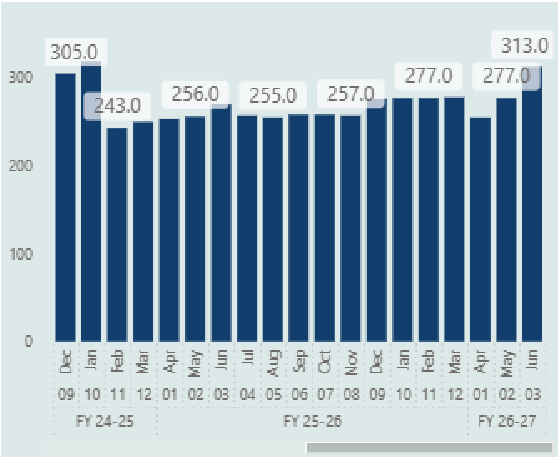
# Improving Children’s Lives

Rate of open CIN per 10,000 children aged 0-17 (latest)

NA

NA

313.0

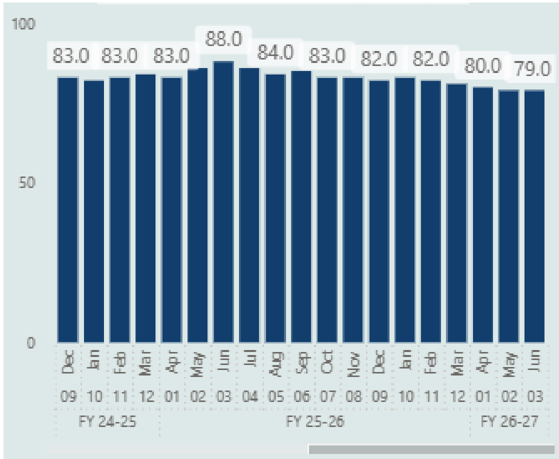



Rate of CLA per 10,000 children (snapshot)

NA

NA

79.0

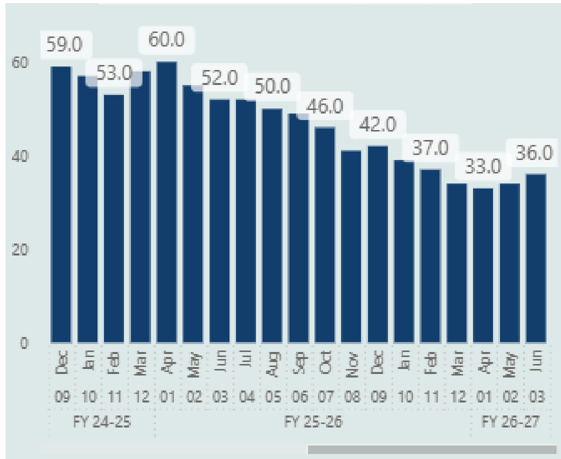



Rate of CPP per 10,000 children aged 0-17 (latest)

NA

NA

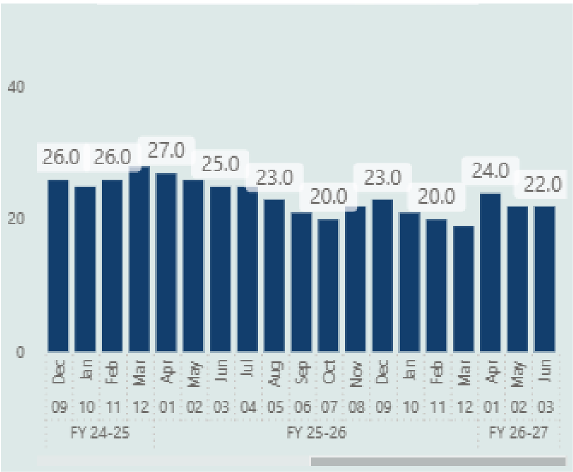
36.0



Re-referrals: children with a previous referral within 12 months of their latest referral (last 6 months)

Low is good

22.0

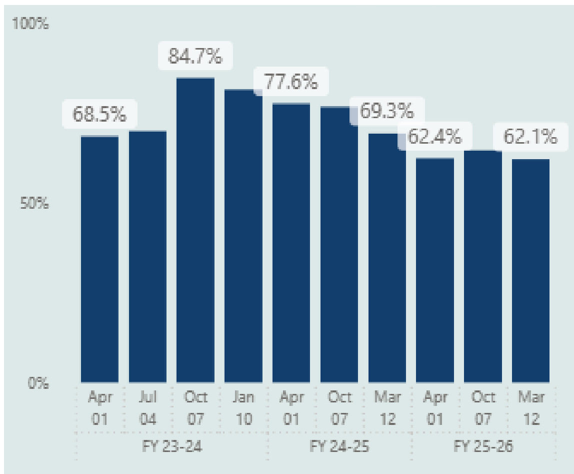



% of good and outstanding Ofsted outcomes for Early Years provision

High is good

NA

99.0%

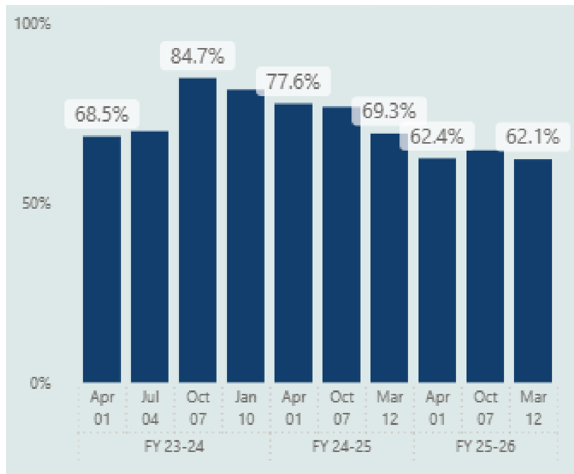



% of children accessing 2 year take up of free childcare

High is good

NA

62.1%

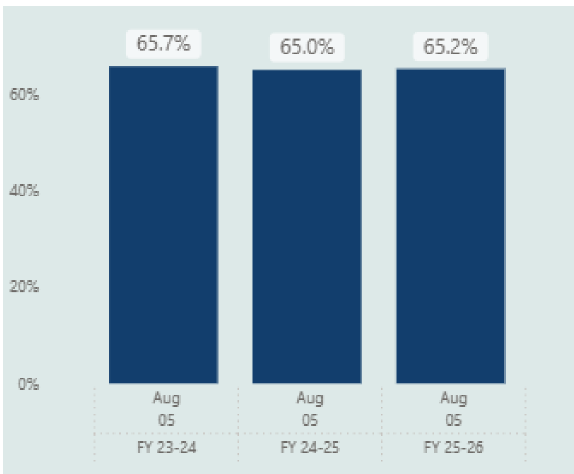



% of children defined as ready for school

High is good

NA

65.2%

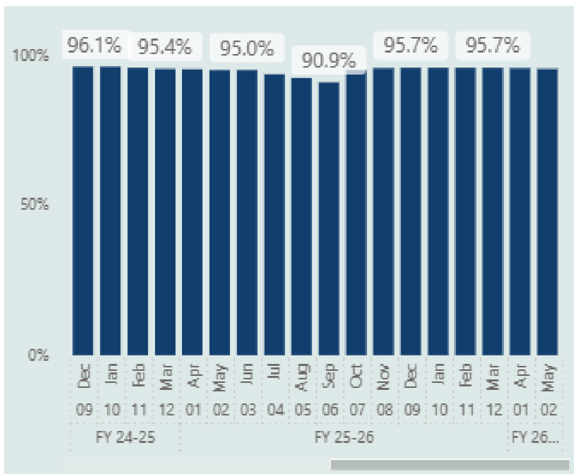



Education, Employment, or Training (EET) of 16-17 year olds (%)

High is good

NA

95.4%



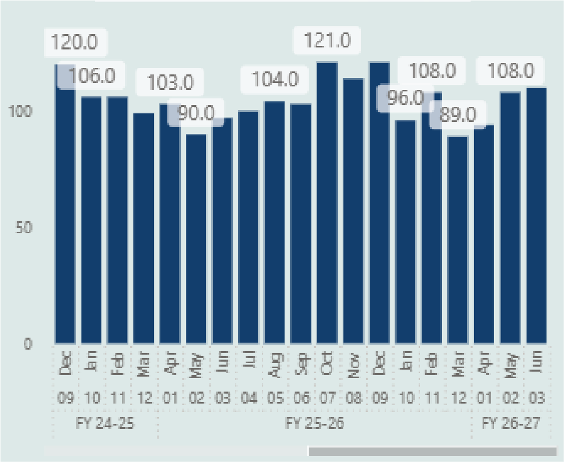
## Tackling Inequalities



Number of rough sleepers currently being supported

High is good

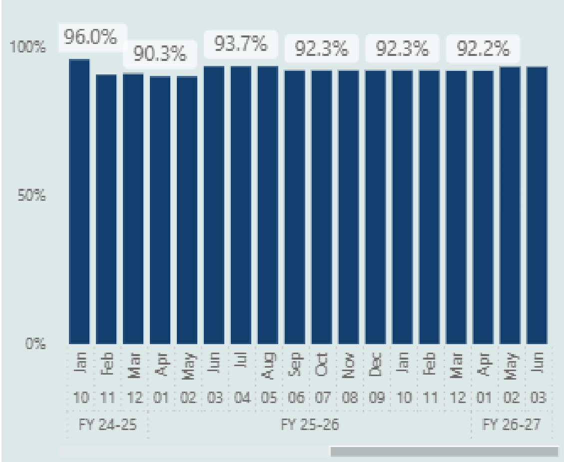
NA 110.0




The percentage of adult social care providers rated good or outstanding by CQC

High is good

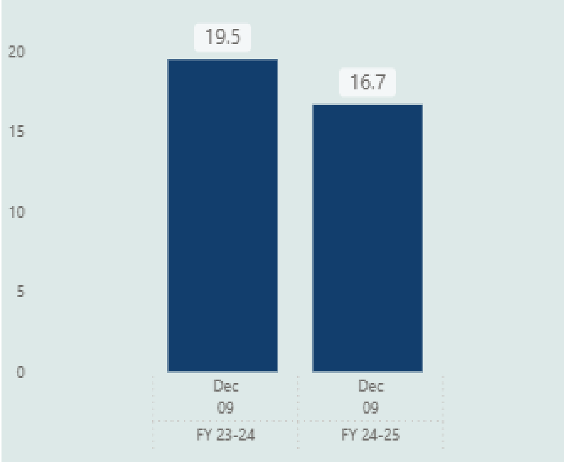
NA 93.5%




Smoking prevalence in adults in routine and manual occupations - 3 year period

NA

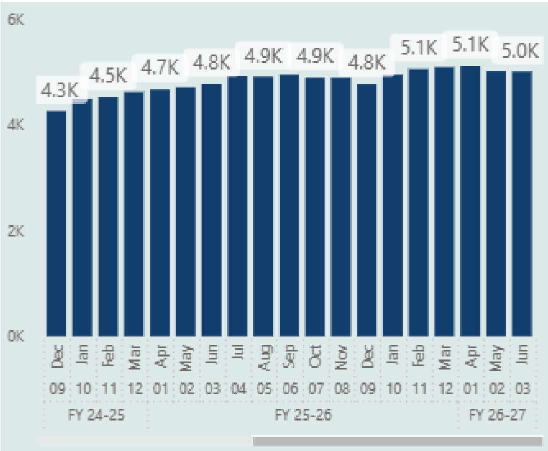
NA 16.7



Number of leisure memberships

High is good

5013.0

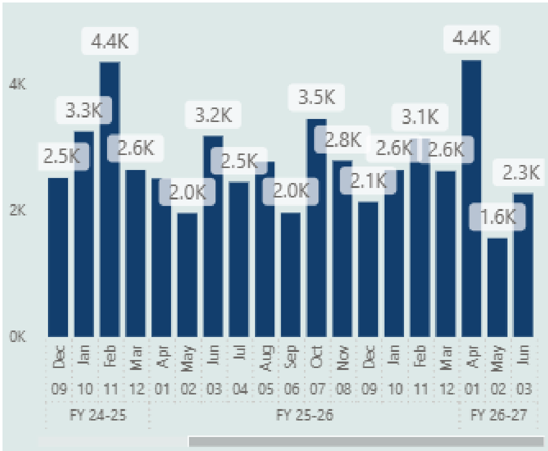



Number of visitors - Arts and Museums

High is good

NA

2270.0

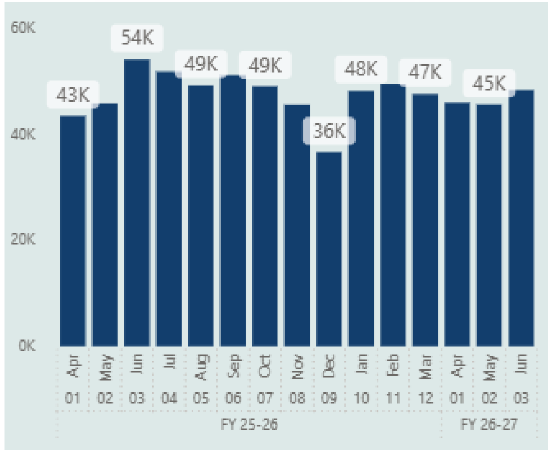



Number of visitors - leisure

High is good

NA

48.2K

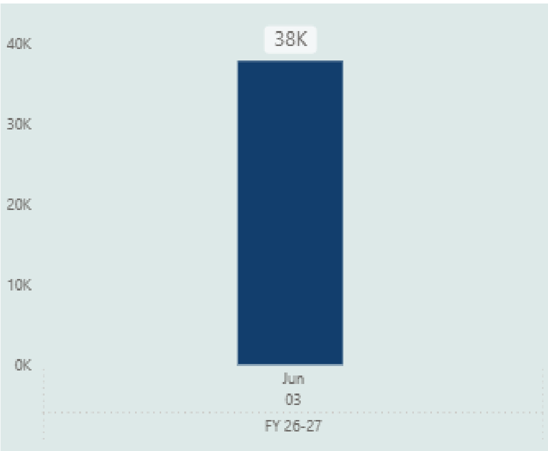



Number of visitors - Libraries + archives

High is good

NA

37.8K

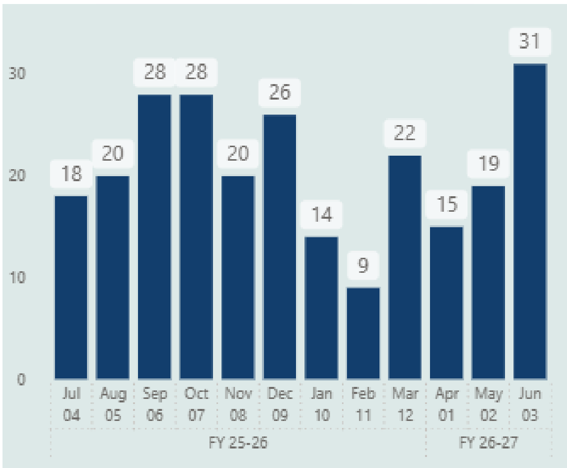



Number of people prevented from becoming homeless

High is good

NA

31.0

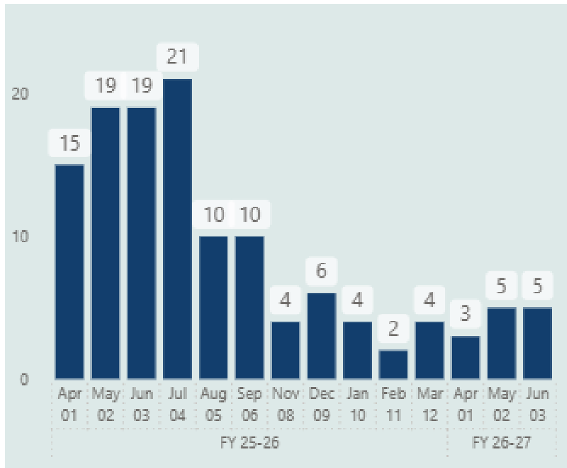



Number of families in b&b accomodation over 6 weeks

Low is good

NA

5.0

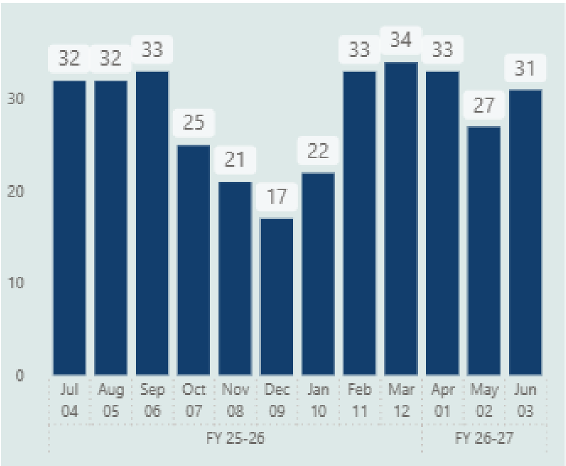


Number of people rough sleeping

Low is good

NA

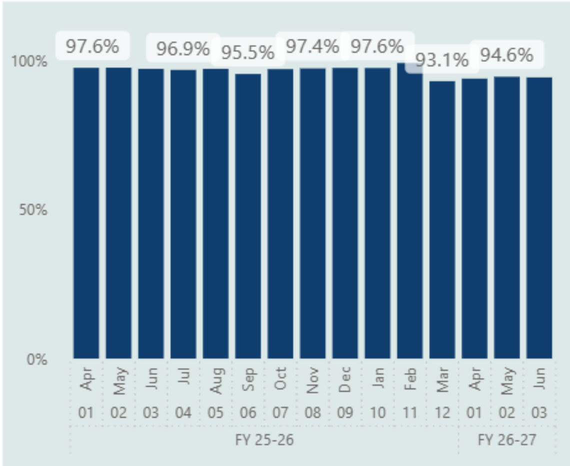
31.0




Overall Housing Stock Compliance (%)

High is good

94.4%

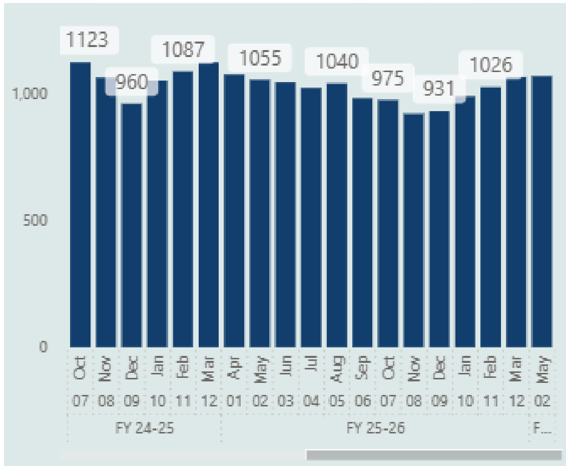



Number of statutory homeless cases open on the last day of the month

Low is good

R

1069.0



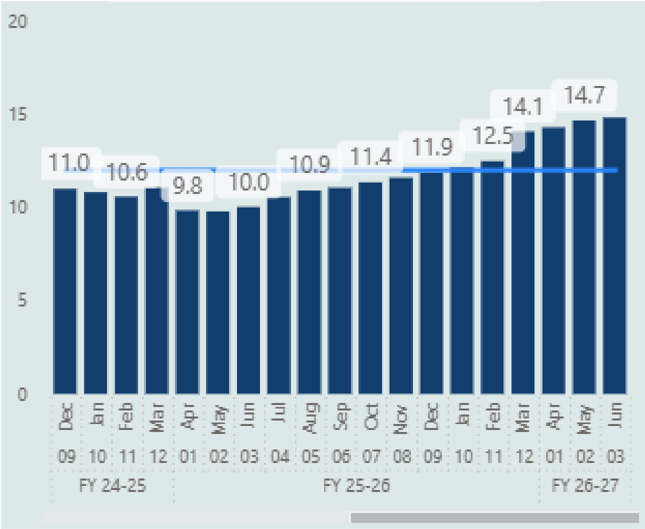
Enablers

Sickness absence: average number of days lost per FTE per year (Bury Council)

Low is good

G

14.8

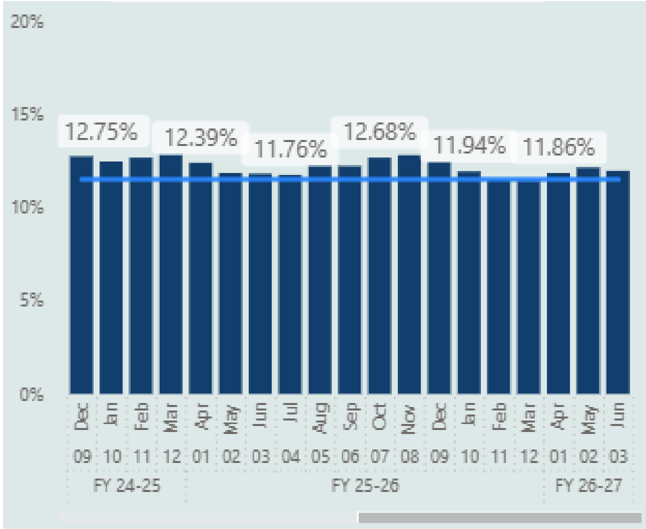



% Staff turnover (Bury Council)

Low is good

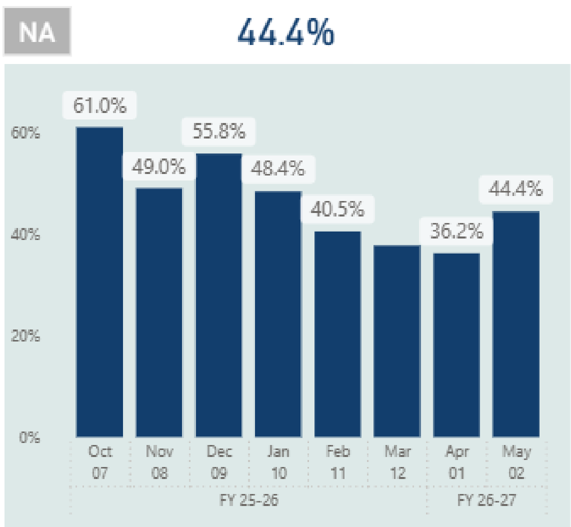
A

12.0%



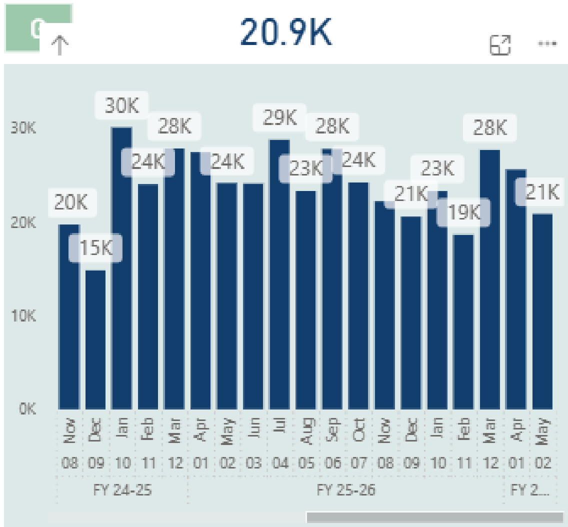
Contact centre – percentage of calls answered within 10 minutes

High is good



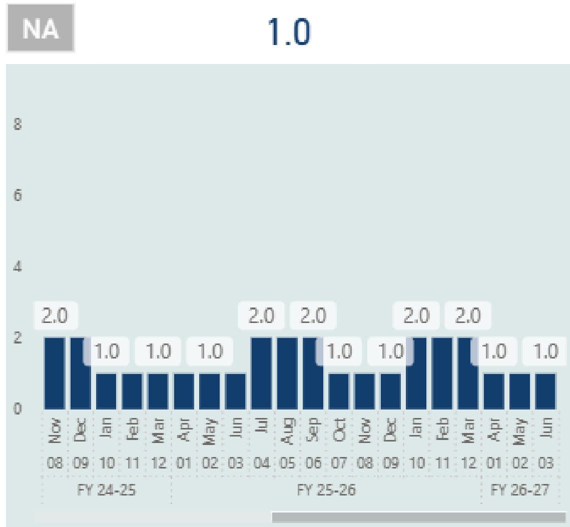

Contact centre – number of contacts received

Low is good



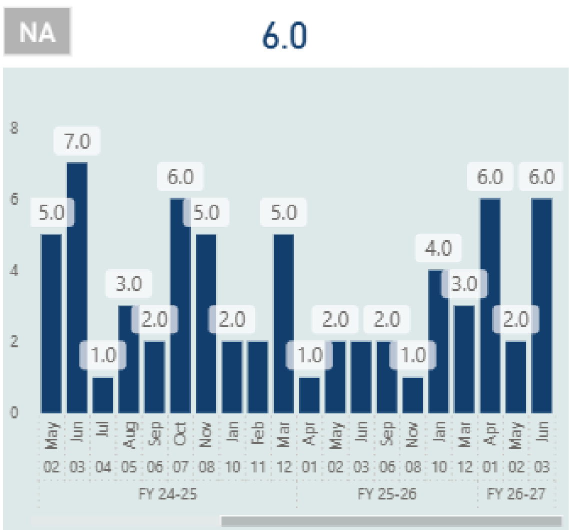

Number of ongoing prosecutions for fly tipping

NA




Number of Fixed Penalty Notices (FPNs) issued for fly tipping

NA



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Bury Council

| Classification: | Decision Type: |
|---|---|
| Open | Non-Key |

| | | |
|---|---|---|
| **Report to:** | Cabinet | **Date:** 09 September 2026 |
| **Subject:** | Finance Update Report – 2026/27 Quarter 1 Position | |
| **Report of** | Cabinet Member for Finance and Transformation | |

**Summary**

This report provides an update to Cabinet on the council's forecast Quarter 1 position across the General Fund revenue and capital budgets, Housing Revenue Account (HRA) and DSG (Dedicated Schools Grant).

The 2026/27 General Fund forecast Quarter 1 position is an overspend of £5.691m, equivalent to 2.26% of the net revenue budget. This needs to be set in the context that the forecast is based on the position at the end of June which is early in the financial year and based on a number of assumptions relating to current expenditure, anticipated demand for services over the rest of the year, cost pressures and service knowledge and a risk assessment of savings delivery. Many councils continue to experience spending pressures in adult and children's social care services particularly, but the council is committed to reducing the scale of the forecast overspend over the rest of the financial year and is targeting a breakeven position by year-end. Further detail on the forecast position is set out in Section 1.

The 2026/27 budget set out approved savings of £16.566m. In addition, £4.294m of unachieved savings from 2025/26 have been carried forward, bringing the total savings requirement for 2026/27 to £20.860m. Of this total £15.696m (75.2%) is forecast to be delivered through the original savings plans, with a further £2.838m (13.6%) expected to be achieved through in-year mitigations. This leaves a forecast shortfall of £2.326m (11.2%) of which £1.735m (74.6%) relates to Children and Young People. Further details on savings delivery are provided in Section 2.

Following the approved use of £3.977m of reserves to support the 2026/27 budget, the current forecast overspend of £5.691m would reduce the balance on the Budget Stabilisation Reserve to £5.977m. This would significantly weaken the Council's financial resilience and its ability to manage future in-year budget pressures or funding shortfalls. The position is unsustainable both in-year and potentially increasing the MTFS funding gap if not addressed, and highlights the urgent need to deliver planned savings and identify further savings and mitigations that will reduce the forecast overspend and resulting requirement for further reserves funding. This includes looking a potential delays to recruitment to vacant posts where it is assessed as appropriate to do so and additional spend controls being introduced in relation to discretionary expenditure. Further detail on the reserves position is provided in Section 3.

At Quarter 1, it is proposed to initially increase the 2026/27 Capital Programme from £110.212m (approved in February 2026) to £132.440m. This represents a net increase

of £22.228m, comprising of £17.336m of slippage from 2025/26 and £7.311m of additional schemes in 2026/27, offset by £2.419m rephased into 2027/28. Of the £7.311m of additional schemes, £0.350m will be funded from additional prudential borrowing, with the remaining schemes funded from external resources. Further detail on the capital programme performance is provided in Section 4. It is recognised that this represents a very ambitious programme and is being reviewed currently to provide assurance on deliverability and expected outcomes and the result of the review and any reprofiling will be included as part of the Quarter 2 report.

The forecast Quarter 1 position on the Collection Fund (Section 5), Housing Revenue Account (HRA) (Section 6) and Dedicated Schools Grant (DSG) (Section 7) are also provided in the body of the report. See Appendix 1 for an update on the Council's Prudential Indicators.

**Recommendation(s)**

Cabinet is asked to:

- Note the 2026/27 forecast revenue Quarter 1 position of a £5.691m overspend (2.26%) against a net budget of £252.135m.

- Note the forecast reduction in General Fund and Earmarked Reserves of £12.047m (27.31%) and forecast closing balance at 31 March 2027 of £32.059m.

- Note the total forecast delivery of savings in 2026/27 of £18.534m (88.85%) against a target of £20.860m, including unachieved savings carried forward from 2025/26. This results in a forecast shortfall of £2.326m (11.15%).

- Note a net increase of £22.228m to the 2026/27 Capital Programme, comprising of £17.336m of slippage from 2025/26 and £7.311m of additional schemes in 2026/27, offset by £2.419m rephased into 2027/28.

- Approve and recommend to Council the in-year capital programme addition requiring £0.350m of additional prudential borrowing.
- Approve and recommend to Council an additional £0.210m of prudential borrowing within the Housing Revenue Account Capital Programme for 2026/27.

- Note the 2026/27 forecast Quarter 1 position for the Collection Fund.

- Note the 2026/27 forecast Quarter 1 position for the Housing Revenue Account (HRA).

- Note the 2026/27 forecast Quarter 1 position for the Dedicated Schools Grant (DSG).

- Note the Quarter 1 Prudential Indicator position

**Reasons for recommendation(s)**

To note the forecast Quarter 1 finance position for 2026/27.

**Alternative options considered and rejected**
N/A

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**Report Author and Contact Details:**


| | |
|---|---|
| *Name:* | *Neil Kissock* |
| *Position:* | *Director of Finance* |
| *Department:* | *Strategy and Transformation* Department |
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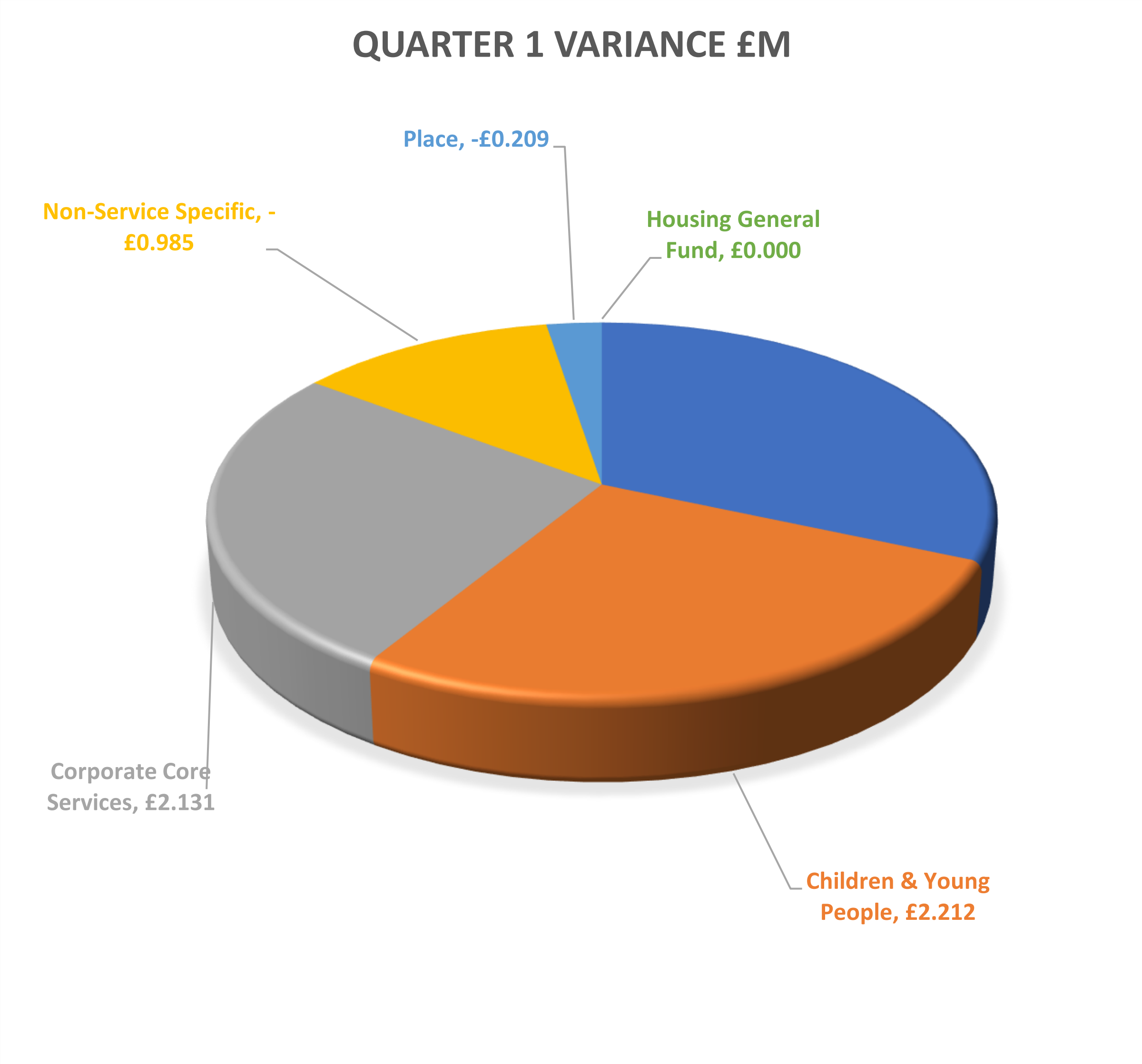
## 1. 2026/27 Revenue Forecast Quarter 1 Position

1.1. The Quarter 1 General Fund revenue forecast is an adverse variance of £5.691m, equivalent to 2.26% of the net revenue budget of £252.135m. To offset this overspend, a further drawdown of £5.691m from the Budget Stabilisation Reserve would be required, in addition to the £3.977m approved as part of the 2026/27 budget setting process. that will reduce the forecast overspend and corresponding requirement for funding from reserves by the end of the year. Further details on the Council's reserve position are provided in Section 3.

| 2026/27 Quarter 1 Forecast Outturn | Revised Budget £m | Quarter 1 Forecast Outturn £m | Quarter 1 Forecast Variance £m | Variance % |
|---|---|---|---|---|
| Directorate: | | | | |
| Health & Adult Care | £100.477 | £103.020 | £2.543 | 2.53% |
| Children & Young People | £66.386 | £68.598 | £2.212 | 3.33% |
| Strategy & Transformation | £29.939 | £32.071 | £2.131 | 7.12% |
| Non-Service Specific | £41.637 | £40.652 | (£0.985) | -2.37% |
| Place | £13.775 | £13.565 | (£0.209) | -1.52% |
| Housing General Fund | (£0.080) | (£0.080) | - | - |
| **NET REVENUE BUDGET** | **£252.135** | **£257.826** | **£5.691** | **2.26%** |
| Funding: | | | | |
| Council Tax | (£124.998) | (£124.998) | - | - |
| Business Rates | (£109.326) | (£109.326) | - | - |
| Government Funding Grants | (£13.834) | (£13.834) | - | - |
| **FUNDING** | **(£248.158)** | **(£248.158)** | **-** | **-** |
| Use of Reserves: | | | | |
| Budget Stabilisation Reserve | (£3.977) | (£3.977) | - | - |
| **USE OF RESERVES** | **(£3.977)** | **(£3.977)** | **-** | **-** |
| **BUDGET POSITION** | **-** | **£5.691** | **£5.691** | **2.26%** |




Details of the significant variances include:

1.2. **Health and Adult Care** Directorate has a forecast adverse variance of £2.543m (2.53%) due to:

1.2.1. **Care in the Community** has a £2.624m (4.02%) forecast adverse variance driven by client numbers and complexity of packages across several settings:

- Supporting Living
- Nursing Homes
- Direct Payments
- Domiciliary care

The pressure on Care packages in 2026/27 is a continuation of the £6m overspend on community care packages in 2025/26.

1.2.2. **Wellness** has forecast a £0.781m (38.45%) adverse variance largely driven by higher than anticipated costs resulting from the opening of the Radcliffe centre and underperformance on income budget targets at the Ramsbottom centre. The service is pursuing mitigating actions to reduce the forecast pressure which, as things stand, remains ongoing in nature and, unless addressed through recurring savings or increased income, will continue to place pressure on future years' budgets and contribute to the Council's medium-term funding gap.

1.2.3. **Departmental Support Services** has a £0.156m (5.72%) forecast adverse variance primarily driven by legal costs charged to the Improvement and Delivery service (£0.085m), and the increased vacancy factor target in the Financial Support Service (£0.047m).

1.2.4. **Commissioning & Procurement** has a £0.157m (1.50%) forecast adverse variance due to:

- Pressures in the Carers service of £0.068m (16.3%) largely driven by forecast pressures on Self-Directed Support Payments of £0.179m partially offset by a favourable variance on Personal Budgets of £0.066m and account closure clawback of £0.060m.
- Strategic Safeguarding team pressures of £0.101m (20.4%), primarily in relation to an increased contribution to the Business Intelligence and Safeguarding Partnership alongside an unachievable vacancy factor target of £0.032m.

1.2.5. **Adult Social Care Operations** has a £1.119m (14.15%) forecast favourable variance due to staffing vacancies within:

- Assessment and Care Management team.
- Integrated Neighbourhood team.
- Community Mental Health team.

1.2.6. Savings put forward by the service in the MTFS (medium Term Financial Strategy) are forecast to be achieved in year.

1.3. **Children and Young People Directorate** has a forecast £2.211m (3.33%) adverse variance due to:

1.3.1. **Children's residential placements** including Children with Disabilities has a forecast adverse variance of £1.912m (11.8%). This is largely driven by an estimated £1.724m increase in costs in relation to increased average prices (10.2%) and £0.188m due to placement numbers being one higher than budgeted for. Increased Mother & Baby placements have a forecast £0.025m adverse variance.

1.3.2. Although additional growth was added to the 2026/27 budget to meet demand, inflation and price increases, the service is still reporting a significant pressure due to significant increases in the average prices. In addition, further challenges are anticipated this financial year due to some of the savings related projects not yet being fully in place, however, the directorate are continuing to aim to get the spends in this area and other placements in line with budget. The area will be subject to detailed intensive oversight as part of the monthly monitoring process taking account of the materiality, complexity, volatility and external market pressures inherent in this budget area.

1.3.3. Wherever possible, the service will continue to mitigate risks around increased complex cases. Rigorous monitoring frameworks, proactive placement reviews and planning will be supported by the agreed increase in commissioning resource to reflect the service as being one of the continuing highest revenue risks to the council. There is potential for a number of young people to move to step down placements during 2026/27 that can support this continued progress.

1.3.4. **Independent Fostering Agency placements** has a forecast adverse variance of £1.026m (24.1%). This is due to average number of placements forecasted as 12 higher on average, than the 78 budgeted across 2026/27 (£0.682m) and average prices have significantly increased (£0.344m). The service will look to review budget expectations in conjunction with residential and MTFS factors already built into placements 2026/27 and manage this alongside the Residential placement reviews and monitoring and align budgets alongside their sufficiency and modelling projections for this and future years.

1.3.5. **Legal services** required for children and young people and their families are forecasting a pressure of £0.419m (35.5%). This is due to demand remaining at elevated levels, with the significant growth experienced during 2025/26 continuing into 2026/27. Although budget growth was included in the 2026/27 budget, the service continues to manage both legacy cases and current demand, creating ongoing budget pressures. Work is underway across both directorates to review legal processes and operating models, as well as strengthen permanent recruitment, with the aim of reducing costs and ensuring a more sustainable service model going forward.

1.3.6. **In-house fostering**, friends & family and Staying Put placements are forecasting a £0.188m combined adverse variance (2.7%). Overall, this is due to price increases and demand being 155 placements against a budget of 150. Whilst this is resulting in an adverse variance in this area, it represents a positive outcome overall as it is helping to mitigate greater cost pressures within residential placement. The directorate are monitoring regional and national fostering developments and the potential budget implications of those. The Directorate will investigate both this and the above budget implications for in-year and MTFS implications.

1.3.7. **Property charges** within CYP directorate are forecasting an adverse variance of £0.175m. This is primarily due to historical challenges in the sale of one property that is incurring security and other costs along with a review of whether capitalisation of a post is an option which could improve the position.

1.3.8. **Children with Disabilities (CWD) service** is forecasting an adverse variance of £0.086m (2.3%) due to increased demand, rising package costs and a growing proportion of high-cost support arrangements. This service is undergoing audit reviews on both support packages and direct payments.

1.3.9. **The Through Care service** is forecasting a favourable variance of £0.288m (11.6%) due to both staffing vacancies and demand. On average the forecast demand is slightly higher than budget and 2025/26 levels, offset by the estimated current average price being lower than budget due to reducing prices from placements. Overall, this results in a favourable variance of £0.205m across all non-pay lines.

1.3.10. **The Emergency Duty team service** is forecasting a favourable variance of £0.138m due to a forecast reduction on staffing costs linked to changes in the service delivery model.

1.3.11. CCYP Directorate is forecasting offsetting efficiencies of £1.090m across the directorate which have been identified to mitigate some of the cost pressures that have been identified

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1.3.12. **The Adoption service** is forecasting a favourable variance of £0.100m (7.9%) due to a continued period of reduced placement numbers and the respective allowances paid out. This includes contribution to our lead partner authority, Bolton.

1.4. **Strategy and Transformation Directorate** has a forecast £2.131m, (7.12%) adverse variance due to:

1.4.1. The **Corporate Collection and Support service** has a forecast adverse variance of £0.481m (21.6%), largely due to an adverse variance of £0.354m in staffing and £0.256m in printing and postage, offset by minor underspends. The service is working hard to find improvements through digital technologies to minimise this.

1.4.2. **Procurement** has a forecast adverse variance of £0.102m (20.4%). This is largely driven by interim staff being in place, pending the implementation of the new structure, which is expected to be fully implemented by the end of the year.

1.4.3. **Health & Environmental Protection** is a forecast adverse variance of £0.134m (11.1%), due to a mixture of small variances consisting of staffing related pressures (£0.025m), additional CIVICA licences costs (£0.062m) and other minor variances.

1.4.4. **People and Inclusion** is a forecast adverse variance of £0.801m (37.7%) due to a loss of income of £0.332m resulting from schools converting into academies and agency costs of £0.426m whilst the restructure is progressing. The service will continue to review staffing costs and income generation opportunities throughout the year to help reduce the forecast overspend.

1.4.5. **Senior Management** is an adverse variance of £0.133m (164.9%) due to staffing costs and reduction in costs charged to the Housing Revenue Account as a result in the change of responsibilities.

1.4.6. **Legal and Democratic** is a forecast adverse variance of £0.390m (7.0%). This is due to:

- Legal service is reliant on locum solicitors to cover some permanent vacancies due to the service struggling to recruit, resulting in a net overspend of £0.350m;
- Democratic service has a favourable variance of £0.200m, largely due to underspends on members' expenses;
- Elections and governance service is reporting an adverse variance of £0.163m as we have held three elections so far (Tottington and Moorside elections plus the local elections in May).
- Coroners Court is currently reporting a favourable variance of £0.135m, Rochdale Council as the lead are due to provide an updated forecast in September;
- Registrars service is reporting an adverse variance of £0.146m.

1.4.7. **Housing Options & Needs** is a forecast favourable variance of £0.073m.

1.4.8. **Emergency Response and resilience** has a forecast £0.103m favourable variance in relation to additional income.

1.4.9. There are several other areas with minor favourable variances totalling £0.60m.

1.5. **Non-Service Specific Directorate** is forecasting a favourable variance of £0.985m, (2.37%) arising from the following:

1.5.1. Reflected within the Non-Service Specific forecast is an estimated financial benefit of £2.000m arising from introducing a short delay in the recruitment process where it is assessed as being appropriate to do so.

As vacancies are filled, the associated savings will be reflected within the individual service areas impacted.

1.5.2. The impact of recruitment delays is partially offset by a forecast pressure of £1.015m relating to increased borrowing costs. This pressure reflects the refinancing of maturing loans during 2026/27 at higher interest rates, driven by the prevailing interest rate environment. In addition, the requirement to undertake further borrowing to support delivery of the approved capital programme has increased financing costs and contributed to the forecast overspend. A reduction in interest rates prior to refinancing, together with any additional slippage in borrowing funded capital projects into 2027/28, would reduce this pressure.

1.5.3. Within this budget, two approved savings are currently forecast to be unachieved. However, the adverse impact of the shortfall has been mitigated through the identification of offsetting non-recurrent underspends.

- Underachievement of **housing integration savings** £1.610m – this represents a recurring pressure from 2025/26 where the saving was not delivered and remains unmet in 2026/27. The original saving of £3m has been part-delivered through a detailed reviewed of general fund costs that are legitimately charged to the Housing Revenue Account. Work is being undertaken to identify the level of further savings that can be achieved through looking at efficiencies across HRA and General Fund services, with the outcome to be reported back to Cabinet as part of the quarter 2 update. Any element of the saving that is then assessed as being undeliverable would then be reflected in the MTFS.
- Underachievement of **Unit 4 savings** £0.753m. Delivery of this saving has been delayed due to a delay in the implementation of the new system to April 2027. It is anticipated that this saving will be achieved in full in 2027/28.

1.6. The **Place Directorate** has a £0.209m (1.52%) favourable variance due to:

1.6.1. A forecast adverse variance of £0.244m within **Waste, Transport and Stores** primarily due to several vacant posts being filled by agency staff, leading to increased staffing costs.

1.6.2. A forecast adverse variance of £0.427m in **Economic Regeneration and Capital Growth** in relation to Future Assets Plan (FAP) costs which are not currently funded within the budget.

1.6.3. A forecast favourable variance of £0.166m in **Street Scene Maintenance** on staffing and street lighting energy due to reductions in unit price and efficiency savings.

1.6.4. A forecast favourable variance of £0.158m in **Commercial Services** due to additional relief income for premises with a standard Service Level Agreement (SLA) requesting cover for periods of absence in caretaking and cleaning.

1.6.5. A forecast favourable variance of £0.111m in **Engineers** primarily due to several vacant posts within the traffic management structure.

1.6.6. A forecast favourable variance of £0.458m in **Facilities Management** which includes large savings in expenditure from buildings that have been closed, reduced staffing costs from vacant posts, and improved income forecasts from additional rechargeable works relating to additional buildings in 2026/27.

1.7. **Staffing costs**

1.7.1. The directorate's projected outturns include variances relating to staffing and agency costs, as set out in the tables below. The Council's total staffing budget of £106.343m includes a savings target of £6.384m linked to the vacancy factor, three days unpaid leave and annual leave purchase schemes. Directorates are currently forecast to achieve the savings target and deliver an additional favourable variance of £5.013m against the staffing budget. Of this, £2.000m is currently reflected in the Non-Service Specific forecast, representing the estimated financial benefit arising from recruitment delays across the Council.

1.7.2. However, the £5.897m favourable variance on staffing budgets is offset by a forecast overspend on agency costs of £5.862m, resulting in a net favourable variance of £0.035m across staffing and agency budgets.

| **2026/27 Quarter 1 Forecast** | **Staffing Budget £m** | **Staffing forecast £m** | **Staffing Variance £m** | **Vacancy/ annual leave savings target achieved £m** |
|---|---|---|---|---|
| Directorate: | | | | |
| Health and Adult Care | £27.669 | £26.694 | (£0.975) | (£1.896) |
| Children & Young People | £25.509 | £23.985 | (£1.524) | (£0.923) |
| Strategy & Transformation | £28.266 | £27.572 | (£0.694) | (£1.904) |
| Non-Service Specific | £3.595 | £1.595 | (£2.000) | - |
| Place | £21.304 | £20.599 | (£0.704) | (£1.662) |
| Housing General Fund | - | - | - | - |
| **NET REVENUE BUDGET** | **£106.343** | **£102.455** | **(£5.897)** | **(£6.384)** |

| 2026/27 Quarter 1 Forecast | Agency Budget £m | Agency Forecast £m | Agency Variance £m | Net Staffing/ Agency Variance £m |
|---|---|---|---|---|
| Directorate: | | | | |
| Health and Adult Care | £0.786 | £1.495 | £0.709 | (£0.266) |
| Children & Young People | £0.229 | £1.298 | £1.069 | (£0.455) |
| Strategy & Transformation | £0.220 | £3.544 | £3.324 | £2.631 |
| Non-Service Specific | - | - | - | (£2.000) |
| Place | £0.690 | £1.449 | £0.759 | £0.055 |
| Housing General Fund | - | - | - | - |
| **NET REVENUE BUDGET** | **£1.925** | **£7.786** | **£5.862** | **(£0.035)** |

**Outlook**

1.8. Whilst anticipated demand and inflationary pressures were incorporated into the 2026/27 budget based on the information available at the time, the Council is currently forecasting a significant overspend of £5.691m. This position reflects continued financial pressures arising from increasing demand for services, inflationary impacts and income volatility. When considered alongside the Council's limited level of reserves, the current forecast reinforces the need for immediate action to strengthen financial control, mitigate in-year pressures and protect the Council's longer-term financial sustainability.

1.9. In response to the forecast overspend, management is looking at potentially implementing a short recruitment delay on vacant posts where it is assessed as appropriate to do so and through mitigations will not have a significant impact on team workloads and service delivery. The estimated financial benefit of this measure is reflected within the figures presented in this report. Whilst this action has reduced the projected overspend, further mitigation is required. Consequently, additional expenditure controls, including senior officer review and approval of discretionary expenditure requests are being implemented to improve the Council's in-year financial position. The impact of these measures will be reported as part of the Quarter 2 monitoring process.

1.10. In parallel, preparation of the 2027/28 budget is underway, including a comprehensive review of all revenue budgets. This review is being informed by the 2025/26 outturn position and the 2026/27 Quarter 1 monitoring process. The outcome will be used to refresh the assumptions underpinning the Medium-Term Financial Strategy (MTFS) and the resulting funding gap. The council is working on proposals to reduce the forecast budget gap which will be brought to Cabinet for consideration. The MTFS will also be extended to include 2029/30 to provide a longer-term assessment of the Council's financial sustainability.

1.11. The budget review will focus on identifying both immediate and medium-term opportunities to reduce expenditure, improve efficiency and ensure that resources are aligned to the Council's strategic priorities.

## 2. Savings

2.1. The 2026/27 savings programme totals £16.566m. In addition, £4.294m of unachieved savings from 2025/26 have been carried forward into 2026/27. This results in a total savings requirement of £20.860m for 2026/27.

2.2. At Quarter 1, it is forecast that £15.696m (75.2%) of savings will be delivered from the original saving proposals and a further £2.838m (13.6%) from mitigations. Total savings delivery is therefore forecast at £18.534m (88.85%) against the overall target of £20.860m, leaving a shortfall of £2.326m (11.15%). This shortfall contributes to the overall Quarter 1 revenue pressure of £5.691m, and work is continuing to both identify further in-year mitigations and bring forward the delivery of approved savings that are currently assessed as being delayed wherever possible

2.3. Of the total forecast savings shortfall of £2.326m, £1.735m (74.6%) relates to Children and Young People. The service is also responsible for £1.651m (38.4%) of the £4.294m savings carried forward from 2025/26 into the current year of which £0.506m is currently forecast as not achieved or mitigated. The service will continue to focus on delivering approved savings proposals and have worked through numerous efficiencies to deliver against those which are most challenging. This work continues alongside reviewing the complex placements that continue at very high cost and pursuing the required contributions from partners.

| 2026/27 Savings Programme | Directorate | Unachieved 2025/26 savings £m | 2026/27 Savings Programme £m | Total 2026/27 savings to be delivered £m | Quarter 1 Forecast £m | Mitigations £m | Quarter 1 Forecast Variance (over)/ underachievement £m |
|---|---|---|---|---|---|---|---|
| Single Handed Care Trial | HAC | (£0.100) | | **(£0.100)** | (£0.100) | | - |
| ASC Community Care budget realignment | HAC | (£0.352) | | **(£0.352)** | (£0.352) | | - |
| Persona - remodel of supported living hours | HAC | (£0.005) | | **(£0.005)** | (£0.005) | | - |
| Maximising charges for Deferred Payments | HAC | (£0.004) | | **(£0.004)** | (£0.004) | | - |
| Saving Already Agreed - Development of Wider Learning Disabilities Strategy for Age 14-25 Cohort | HAC | | (£0.220) | **(£0.220)** | (£0.220) | | - |
| HAC Strategic Workforce Review | HAC | | (£0.061) | **(£0.061)** | (£0.061) | | - |
| Adults Commissioning Review | HAC | | (£1.000) | **(£1.000)** | (£1.000) | | - |
| Single Handed Care Trial | HAC | | (£0.200) | **(£0.200)** | (£0.200) | | - |
| Personal Budget Review | HAC | | (£0.250) | **(£0.250)** | (£0.250) | | - |
| Persona - employability | HAC | | (£0.050) | **(£0.050)** | (£0.050) | | - |
| Persona - Willow Street (6 flats for decant from dispersed accommodation) | HAC | | (£0.100) | **(£0.100)** | (£0.100) | | - |
| Rapid Response Assessment software - Technological efficiencies | HAC | | (£0.009) | **(£0.009)** | (£0.009) | | - |
| BEST - review charges | HAC | | (£0.010) | **(£0.010)** | (£0.010) | | - |
| BEST - introduce card payments | HAC | | (£0.003) | **(£0.003)** | (£0.003) | | - |
| Community Equipment - procurement review | HAC | | (£0.020) | **(£0.020)** | (£0.020) | | - |
| Community Equipment - Reconfigure out of hours service | HAC | | (£0.038) | **(£0.038)** | (£0.038) | | - |
| Telecare - target new customers | HAC | | (£0.035) | **(£0.035)** | (£0.035) | | - |
| Telecare - tech first approach | HAC | | (£0.030) | **(£0.030)** | (£0.030) | | - |
| Falcon & Griffin - review of rotas | HAC | | (£0.015) | **(£0.015)** | (£0.015) | | - |
| Commissioned Services - review of client contribution limit for day services | HAC | | (£0.253) | **(£0.253)** | (£0.253) | | - |
| IMPOWER review | HAC | | (£0.667) | **(£0.667)** | (£0.667) | | - |
| IMPOWER review | HAC | | (£1.000) | **(£1.000)** | (£1.000) | | - |
| Persona Supported living rate review | HAC | | (£0.250) | **(£0.250)** | (£0.250) | | - |
| Retender of Neighbourhood housing support contract | HAC | | (£0.047) | **(£0.047)** | (£0.047) | | - |
| Reduction of Leisure council subsidy | HAC | | (£0.125) | **(£0.125)** | (£0.125) | | - |

| 2026/27 Savings Programme | Directorate | Unachieved 2025/26 savings | 2026/27 Savings Programme | Total 2026/27 savings to be delivered | Quarter 1 Forecast | Mitigations | Quarter 1 Forecast Variance (over)/ underachievement |
|---|---|---|---|---|---|---|---|
| | | £m | £m | £m | £m | £m | £m |
| Live Well GM Delivery partner - funding for role | HAC | | (£0.027) | **(£0.027)** | (£0.027) | | - |
| Live Well restructure | HAC | | (£0.100) | **(£0.100)** | (£0.100) | | - |
| **HAC Subtotal** | | **(£0.461)** | **(£4.510)** | **(£4.971)** | **(£4.971)** | **-** | **-** |
| Therapeutic support team for Children in Care | CYP | (£0.195) | | **(£0.195)** | - | (£0.195) | - |
| Victoria Family Centre delivery model review | CYP | | (£0.050) | **(£0.050)** | - | (£0.050) | - |
| Support at home reduced demand | CYP | | (£0.035) | **(£0.035)** | (£0.035) | | - |
| School Improvement Service - reduction due to academisation | CYP | | (£0.100) | **(£0.100)** | (£0.100) | | - |
| Governance Support - full recovery from schools | CYP | | (£0.109) | **(£0.109)** | (£0.109) | | - |
| Business Support Use of Magic Notes software | CYP | | (£0.100) | **(£0.100)** | (£0.100) | | - |
| CSE Team - small restructure | CYP | | (£0.035) | **(£0.035)** | - | | £0.035 |
| Residential homes / CWD - step down of residential placements | CYP | | (£1.000) | **(£1.000)** | (£1.000) | | - |
| Various Building costs | CYP | | (£0.100) | **(£0.100)** | - | - | £0.100 |
| Foster Carers | CYP | (£0.180) | (£0.100) | **(£0.280)** | (£0.200) | (£0.080) | - |
| Family Safeguarding Model | CYP | (£0.100) | (£0.050) | **(£0.150)** | - | (£0.150) | - |
| Edge of Care | CYP | (£0.494) | (£0.106) | **(£0.600)** | (£0.600) | | |
| Creation of Council-Owned Residential Children's Homes | CYP | | (£0.400) | **(£0.400)** | - | | £0.400 |
| Reconnect - step down from residential care | CYP | (£0.176) | (£1.892) | **(£2.068)** | (£2.068) | | |
| Progressing the Edge of Care Service Review | CYP | (£0.506) | (£0.694) | **(£1.200)** | - | | £1.200 |
| **CYP Subtotal** | | **(£1.651)** | **(£4.771)** | **(£6.422)** | **(£4.212)** | **(£0.475)** | **£1.735** |
| Temporary Accommodation demand reduction | S&T | | (£0.377) | **(£0.377)** | (£0.377) | | - |
| Staffing changes - use of HPG funding | S&T | | (£0.053) | **(£0.053)** | (£0.053) | | - |
| HR Staffing savings | S&T | | (£0.075) | **(£0.075)** | (£0.075) | | - |
| Review of payroll transactional charges | S&T | | (£0.050) | **(£0.050)** | (£0.050) | | - |
| FAIR - invest to save Fraud officer reduce expenditure leakage | S&T | | (£0.050) | **(£0.050)** | (£0.050) | | - |
| Law & Democratic services - reduction in external agency staff | S&T | | (£0.100) | **(£0.100)** | - | | £0.100 |
| Law & Democratic services - burial service fees | S&T | | (£0.040) | **(£0.040)** | (£0.040) | | - |
| Strategic Partnerships staffing reduction | S&T | | (£0.050) | **(£0.050)** | (£0.024) | | £0.026 |
| Strategic Workforce review | S&T | | (£2.000) | **(£2.000)** | (£2.000) | | - |
| Reduction in Third party spend | S&T | | (£1.000) | **(£1.000)** | (£1.000) | | - |

| 2026/27 Savings Programme | Directorate | Unachieved 2025/26 savings £m | 2026/27 Savings Programme £m | Total 2026/27 savings to be delivered £m | Quarter 1 Forecast £m | Mitigations £m | Quarter 1 Forecast Variance (over)/ underachievement £m |
|---|---|---|---|---|---|---|---|
| Strategic Workforce review | S&T | | (£1.000) | **(£1.000)** | (£1.000) | | - |
| IT Supplier Review [Digital] | S&T | | (£0.050) | **(£0.050)** | (£0.050) | | - |
| IT licence Review [Digital] | S&T | | (£0.025) | **(£0.025)** | (£0.025) | | - |
| Unit 4 Reimplementation & Transformation Review | S&T | (£0.100) | (£0.853) | **(£0.953)** | - | (£0.753) | £0.200 |
| Contact Centre Review [Digital] | S&T | | (£0.100) | **(£0.100)** | (£0.100) | | - |
| Corporate Core Structures including homelessness and housing options review and integration of communities | S&T | | (£0.122) | **(£0.122)** | (£0.122) | | - |
| **Strategy & Transformation Subtotal** | | **(£0.100)** | **(£5.945)** | **(£6.045)** | **(£4.966)** | **(£0.753)** | **£0.326** |
| Debt refinancing | NSS | | (£0.500) | **(£0.500)** | **(£0.500)** | | - |
| Contract Efficiencies | NSS | (£0.400) | (£0.350) | **(£0.750)** | (£0.750) | - | - |
| Integration of Housing | NSS | (£1.610) | | **(£1.610)** | - | (£1.610) | - |
| **Non-Service Specific Subtotal** | | **(£2.010)** | **(£0.850)** | **(£2.860)** | **(£1.250)** | **(£1.610)** | **-** |
| Fleet Function Review | Place | (£0.070) | | **(£0.070)** | - | | £0.070 |
| Organisation Delivery Model Review | Place | | (£0.055) | **(£0.055)** | - | | £0.055 |
| Stores Function Review | Place | | (£0.050) | **(£0.050)** | - | | £0.050 |
| Explore Advertising opportunities on highway network | Place | | (£0.050) | **(£0.050)** | (£0.050) | | - |
| Car Park Charges Review | Place | (£0.002) | (£0.126) | **(£0.128)** | (£0.147) | | (£0.019) |
| Light Reduction - Trim and Dim | Place | | (£0.209) | **(£0.209)** | (£0.100) | | £0.109 |
| **Place Subtotal** | | **(£0.072)** | **(£0.490)** | **(£0.562)** | **(£0.297)** | **-** | **£0.265** |
| **TOTAL SAVINGS PROGRAMME** | | **(£4.294)** | **(£16.566)** | **(£20.860)** | **(£15.696)** | **(£2.838)** | **£2.326** |

## 3. Reserves

3.1. The table below shows the balance on reserves as at 31 March 2026 of £44.106m compared to the forecast year-end balance as at 31 March 2027 of £32.059m. This represents a forecast decrease of £12.047m, equating to a 27.31% reduction in reserves.

| Table 4: General Fund Reserves | | | Balance at 31 March 2026 £m | Forecast Movement 2026/27 £m | Balance at 31 March 2027 £m |
|---|---|---|---|---|---|
| | | | | | |
| **General Fund** | | | **(£10.000)** | **-** | **(£10.000)** |
| **Directorate Reserves** | | | **(£2.517)** | **£0.459** | **(£2.058)** |
| Corporate Reserves | Investment | Invest to Save | (£1.974) | (£0.016) | (£1.990) |
| Corporate Reserves | Investment | Regeneration | (£0.001) | - | (£0.001) |
| Corporate Reserves | Investment | Transformation | (£0.838) | £0.601 | (£0.237) |
| Corporate Reserves | Risk | Volatility/Demand | - | - | - |
| Corporate Reserves | Risk | Insurance | (£1.985) | - | (£1.985) |
| Corporate Reserves | Risk | DSG | (£4.000) | - | (£4.000) |
| Corporate Reserves | Stabilisation | Net Budget | (£15.599) | £9.622 | (£5.977) |
| Corporate Reserves | Stabilisation | Funding | (£1.542) | - | (£1.542) |
| **Corporate Reserves** | | | **(£25.939)** | **£10.207** | **(£15.732)** |
| | | | | | |
| **External Funding** | | | **(£5.650)** | **£1.381** | **(£4.269)** |
| **GF RESERVES TOTAL** | | | **(£44.106)** | **£12.047** | **(£32.059)** |

3.2. Following the approved use of £3.977m of reserves to support the 2026/27 budget, the current forecast overspend of £5.691m would leave only £5.977m in the Budget Stabilisation Reserve. This would significantly reduce the Council's financial resilience and its ability to manage future in-year budget pressures or funding shortfalls. The position is unsustainable and highlights the urgent need to deliver planned savings and identify further recurring budget reductions.

3.3. This level of reduction presents a significant financial risk and is not sustainable. The significant use of reserves to support the revenue budget over recent years reflects the underlying and ongoing budget pressures which need to be addressed through the identification and delivery of additional savings that will enable a balanced budget. Further management action will be required during the year to reduce the overspend and ensure a balanced year-end position.

3.4. The level of general fund reserves balances held from 31 March 2024 to the forecast for 31 March 2027 can be seen in the table below which clearly demonstrates the rate of depletion of available reserves is not sustainable.

| General Fund Reserves | | Balance at 31 March 2024 £m | Balance at 31 March 2025 £m | Balance at 31 March 2026 £m | Forecast Balance at 31 March 2027 £m |
|---|---|---|---|---|---|
| **General Fund** | | **(£10.000)** | **(£10.000)** | **(£10.000)** | **(£10.000)** |
| **Directorate Reserves** | | **(£3.225)** | **(£4.013)** | **(£2.517)** | **(£2.058)** |
| Investment | Invest to Save | (£1.519) | (£1.958) | (£1.974) | (£1.990) |
| Investment | Regeneration | - | (£0.020) | (£0.001) | (£0.001) |
| Investment | Transformation | (£0.838) | (£0.838) | (£0.838) | (£0.237) |
| Risk | Insurance | (£4.664) | (£4.905) | (£1.985) | (£1.985) |
| Risk | DSG | (£6.000) | (£6.000) | (£4.000) | (£4.000) |
| Stabilisation Reserves | Net Budget | (£43.341) | (£25.638) | (£15.599) | (£5.977) |
| Stabilisation Reserves | Funding | (£7.193) | (£1.542) | (£1.542) | (£1.542) |
| **Corporate Reserves** | | **(£63.555)** | **(£40.901)** | **(£25.939)** | **(£15.732)** |
| **External Funding** | | **(£13.634)** | **(£8.701)** | **(£5.650)** | **(£4.269)** |
| **GF RESERVES TOTAL** | | **(£90.414)** | **(£63.615)** | **(£44.106)** | **(£32.059)** |
| **Annual reduction in reserves (£m)** | | **-** | **£26.799** | **£19.509** | **£12.047** |
| **Annual reduction in reserves (%)** | | **-** | **29.6%** | **30.7%** | **27.3%** |

## 4. 2026/27 Capital Programme Quarter 1

4.1. The Council's Capital Programme is set on a three-year rolling basis and the programme for 2026/27 to 2028/29 was approved by Budget Council in February 2026, as follows:

2026/27 £110.212m

2027/28 £48.775m

2028/29 £27.549m

4.2. It is recommended that Cabinet approve the carry forward of £17.336m of rephased expenditure from the 2025/26 Capital Programme into the 2026/27 Capital Programme to support the completion of schemes continuing into the current financial year.

4.3. In addition to the rephased expenditure, several other amendments have been made to the 2026/27 Capital Programme since the beginning of April 2026. These changes have resulted in a net increase of £4.892m, as shown in Table 1 below. Overall, the revised 2026/27 Capital Programme stands at £132.440m, of which £36.215m relates to Housing Revenue Account (HRA) schemes. Included within the programme is a proposed additional cost of £1m in relating to a necessary delay in the implementation of the new Unit 4 core system from November 2026 to April 2027. The delay reflects the outcome of a detailed recalibration exercise following the full scale of the issues with the current system, and integrations, having been identified, with unacceptable operational and delivery risks in the November date. The additional cost will be met from the existing Organisational Redesign and Transformation programme and will not represent an additional funding requirement.

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4.4. Alongside the rephased expenditure and additional funding set out in Table 1 there is currently an ongoing exercise to refresh the Capital Programme and consequently a revised Capital Programme will be reported at Quarter 2 following a detailed assessment of in-year deliverability.

| Table 1<br><br>Capital Programme 2026/27 – Quarter 1 | Total Council Approved Budget Feb 2026<br><br>*£m* | 2025/26 Slippage Recommended for Approval<br><br>*£m* | Proposed In-Year Additions / (Slippage)<br><br>*£m* | Revised Programme at Qtr1<br><br>*£m* |
|---|---|---|---|---|
| **Capital Expenditure by Theme** | | | | |
| Regeneration and Housing | £19.295 | £5.944 | | £25.239 |
| Schools | £18.656 | £1.807 | £6.686 | £27.149 |
| Highways | £26.195 | £2.507 | - | £28.702 |
| Environmental & Communities Projects | £3.007 | £0.405 | (£1.794) | £1.618 |
| Corporate Property & Estates | £5.957 | £1.310 | - | £7.267 |
| Transport Fleet Management | £0.500 | - | - | £0.500 |
| ICT & Digital Transformation | £1.500 | - | - | £1.500 |
| Organisation Redesign & Transformation | £3.840 | £0.409 | - | £4.249 |
| **General Fund Expenditure Subtotal** | **£78.951** | **£12.382** | **£4.892** | **£96.225** |
| **HRA Expenditure Subtotal** | **£31.261** | **£4.954** | **-** | **£36.215** |
| **Total Council Expenditure** | **£110.212** | **£17.336** | **£4.892** | **£132.440** |
| **Financing the Capital Programme** | | | | |
| Prudential Borrowing | £30.361 | £7.769 | £0.350 | £38.480 |
| External Funding | £48.590 | £3.855 | £4.542 | £56.987 |
| Capital Receipts | - | £0.708 | - | £0.708 |
| General Fund RCCO | - | £0.050 | - | £0.050 |
| **General Fund Financing Subtotal** | **£78.951** | **£12.382** | **£4.892** | **£96.225** |
| Prudential Borrowing HRA | £10.474 | £4.596 | £0.210 | £15.280 |
| External Funding HRA | - | £0.150 | - | £0.150 |
| Capital Receipts HRA | £3.120 | (£0.708) | £0.706 | £3.118 |
| Housing Revenue Account DRF/MRR | £17.667 | £0.916 | (£0.916) | £17.667 |
| **HRA Financing Subtotal** | **£31.261** | **£4.954** | **-** | **£36.215** |
| **Total Council Financing** | **£110.212** | **£17.336** | **£4.892** | **£132.440** |

4.5. The Capital Programme has been updated to reflect several additions and rephasing adjustments identified at Quarter 1. The net impact of these changes is an increase of £4.892m, as detailed below:

**Recommended additions to the 2026/27 Capital Programme totalling £7.311m:**

- **Schools**: £0.350m of prudential borrowing and £0.879m of grant to fund Elmsbank Post16 school, the new Ashgrove Pupil Referral Unit (PRU) school and the Bury Youth Justice Service.
- **Schools**: £5.957m additional High Needs and Best Start Family Hubs grant allocations notified by DfE (Department for Education).
- **Environmental & Communities Projects**: £0.125m external grants for a Heat Network Study in Bury Town Centre and The Met Decarbonisation.

**Recommended rephasing to the 2027/28 Capital Programme totalling £2.419m:**

- **Environmental & Communities Projects**: re-phasing of £1.919m Electric Vehicle Charging Infrastructure grant allocation from GMCA (Greater Manchester Combined Authority) into 2027/28 due to delays in appointing, in collaboration with TfGM and neighbouring GM authorities, a contractor to deliver the works.
- **Schools**: £0.500m re-phasing of DfE grant for the CYP agreed contribution to the DfE carried out scheme, payable on DfE's request and likely to materialise during 2027/28.

| **Table 2**<br><br>**CAPITAL PROGRAMME AMENDMENTS** | **QUARTER 1 – JUNE 2026** | **Total additions / (rephases) at Qtr1**<br><br>**£m** |
|---|---|---|
| | | |
| **Capital Theme** | **Capital Scheme** | |
| Schools | Elms Bank-Post 16 schemes | £0.380 |
| Schools | Ash Grove - Combined PRU | £0.499 |
| Schools | Bury Youth Justice Service | £0.350 |
| Schools | Best Start Family Hubs | £0.077 |
| Schools | High Needs Provision and DFC Capital Allocations | £5.881 |
| Schools | Special Free School-(2nd SEN school)-SEMH | (£0.500) |
| Environmental & Communities Projects | The Met (Derby Hall) Decarb | £0.025 |
| Environmental & Communities Projects | Heat Network in Bury TC | £0.100 |
| Environmental & Communities Projects | Electric Vehicle Charging Infrastructure | (£1.919) |
| | **TOTAL BUDGET CHANGES AT QTR1** | **£4.892** |
| | Prudential Borrowing | £0.350 |
| | External Funding | £4.542 |
| | **TOTAL FINANCING CHANGES AT QTR1** | **£4.892** |

4.6. This report seeks Cabinet approval to recommend to Council the inclusion of an additional £0.350m of Prudential Borrowing in the 2026/27 Capital Programme (Table 2) to support the Bury Youth Justice Service. It is worth noting the Treasury Management budget at Quarter 1 is forecasting a pressure of £1.015m which is based on the Capital Programme approved in February 2026 (see Section 1.5.1 of this report). The proposed additional borrowing will increase the Council's financing costs and place further pressure on the in-year treasury management budget. Additionally, these additional costs will need to be reflected within the Council's Medium Term Financial Strategy and will increase the 2027/28 budget gap.

4.7. Additionally, the Housing Revenue Account (HRA) is seeking approval for a further £0.210m of prudential borrowing. Although there is no impact on the General Fund, the HRA will need to absorb the associated financing costs. Further details on the HRA's Capital Programme are in Section 6.

**2026/27 Capital Programme Delivery**

4.8. The revised 2026/27 Capital Programme will form the baseline against which the delivery and performance of capital schemes during 2026/27 will be monitored and reported throughout the year.

4.9. Capital expenditure incurred up to 30 June 2026 totals £18.500m, representing 14% of the revised programme value of £132.440m. This expenditure reflects payments made by the Council for capital related goods, works and services between 1 April 2026 and 30 June 2026. A summary of expenditure to date is set out in Table 3 below.

| Table 3 | 2026/27 Capital Programme | | In-Year Performance | |
|---|---|---|---|---|
| | Council Approved Programme | Revised Proposed Programme | Actual Spend at P3 | Actual Spend at P3 |
| | *£m* | *£m* | *£m* | *%* |
| **Capital Expenditure by Theme** | | | | |
| Regeneration and Housing | £19.295 | **£25.239** | £8.17 | 32% |
| Schools | £18.656 | **£27.149** | £3.83 | 14% |
| Highways | £26.195 | **£28.702** | £1.74 | 6% |
| Environmental & Communities Projects | £3.007 | **£1.618** | £0.05 | 3% |
| Corporate Property & Estates | £5.957 | **£7.267** | £0.17 | 2% |
| Transport Fleet Management | £0.500 | **£0.500** | £0.16 | 32% |
| ICT & Digital Transformation | £1.500 | **£1.500** | £0.47 | 31% |
| Organisation Redesign & Transformation | £3.840 | **£4.249** | £0.36 | 8% |
| **SUBTOTAL GF EXPENDITURE** | **£78.951** | **£96.225** | **£14.94** | **14%** |
| **SUBTOTAL HOUSING HRA EXPENDITURE** | **£31.261** | **£36.215** | **£3.56** | **10%** |
| **TOTAL COUNCIL EXPENDITURE** | **£110.212** | **£132.440** | **£18.50** | **14%** |
| **Financing the Capital Programme** | | | | |
| Prudential Borrowing | £30.361 | **£38.48** | | |
| External Funding | £48.590 | **£56.99** | | |
| Capital Receipts | - | **£0.708** | | |
| General Fund RCCO | - | **£0.050** | | |

| | | | |
|---|---|---|---|
| **SUBTOTAL GF FINANCING** | **£78.951** | **£96.225** | |
| Prudential Borrowing HRA | £10.474 | **£15.28** | |
| External Funding HRA | - | **£0.150** | |
| Capital Receipts HRA | £3.120 | **£3.120** | |
| Housing Revenue Account DRF/MRR | £17.667 | **£17.667** | |
| **SUBTOTAL HRA FINANCING** | **£31.261** | **£36.215** | |
| **TOTAL FINANCING** | **£110.212** | **£132.440** | |

4.10. The monitoring of the programme throughout the year involves the Council's Finance Team working closely with operational services and respective project managers through monthly monitoring sessions. It is intended that a comprehensive review of the programme proposed spend and outputs will be completed by the end of Quarter 2, by conferring with project managers and business partners on each scheme's planned delivery and spending for the remainder of the year.

4.11. In accordance with the Prudential Code for Capital Finance in Local Authorities, the Council is required to monitor and report performance against its Prudential Indicators on a quarterly basis. An update on the Council's Prudential Indicators as at Quarter 1 is provided in Appendix 1.

## 5. Collection Fund Outturn Position

5.1. The increasing prominence of council tax and business rates funding council services means that the collection fund is closely monitored on an ongoing basis. The quarter 1 position on the collection fund is an in-year deficit of £3.924m, with a residual deficit brought forward from 2025/26 of £2.223m (this is the difference between the statutory estimated deficit as at 15 January 2025 and the outturn position). This brings the overall forecast to a net deficit of £6.148m. The Council's share of the deficit is £5.571m and Greater Manchester Combined Authority's share is £0.577m (for police and fire and rescue services).

5.2. The proportionate shares for Business Rates and Council Tax mean that Greater Manchester Combined Authority have a 1% share of Business Rates and a 16% share of Council Tax, whereas the Council have a 99% share of Business Rates and 84% share of Council Tax.

5.3. The main movements which are resulting in the deficit position of £6.148m (Bury share £5.571m) are shown below.

| **2026/27 Surplus/(Deficit) on Collection Fund** | **Council Tax £m** | **NNDR £m** | **TOTAL £m** |
|---|---|---|---|
| **2025/26 Surplus/(Deficit) Balance b/f** | **(£2.483)** | **£0.260** | **(£2.223)** |
| **2026/27** | | | |
| Income | £153.074 | £51.579 | **£204.654** |
| Section 31 grants | | £20.450 | **£20.450** |
| **Contributions towards Previous Year's Deficit:** | | | |
| Bury MBC | £0.000 | £0.000 | **£0.000** |
| Police and Crime Commissioner | £0.000 | | **£0.000** |
| General Mayoral - Fire and Rescue Service | £0.000 | £0.000 | **£0.000** |
| **Total Income** | **£153.074** | **£72.030** | **£225.104** |
| **Precepts and Demands on Collection Fund:** | | | |
| Bury MBC | (£124.224) | (£68.801) | **(£193.025)** |
| Police and Crime Commissioner | (£16.750) | | **(£16.750)** |
| General Mayoral - Fire and Rescue Service | (£9.038) | (£0.695) | **(£9.733)** |
| Disregards: Renewable Energy | | £0.000 | **£0.000** |
| Cost of Collection | | (£0.229) | **(£0.229)** |
| Transitional Protection Payments | | £0.271 | **£0.271** |
| **Impairment of Debts/Appeals:** | | | |
| Write-offs of Uncollectable Amounts | £0.000 | £0.000 | **£0.000** |
| (Increase)/Decrease in the Allowance for Impairment of Arrears | (£3.061) | (£1.032) | **(£4.093)** |
| (Increase)/Decrease in the Allowance for Impairment of Appeals | | (£1.545) | **(£1.545)** |
| **Payment of Previous Year's Surplus:** | | | |
| Bury MBC | (£0.774) | (£2.972) | **(£3.746)** |
| Police and Crime Commissioner | (£0.103) | | **(£0.103)** |
| General Mayoral - Fire and Rescue Service | (£0.046) | (£0.030) | **(£0.076)** |
| **Total Expenditure** | **(£153.997)** | **(£75.031)** | **(£229.028)** |

| | | | |
|---|---|---|---|
| **2026-27 In-Year Surplus/(Deficit)** | **(£0.923)** | **(£3.002)** | **(£3.924)** |
| **Surplus/(Deficit) as at 31.03.2027** | **(£3.406)** | **(£2.742)** | **(£6.148)** |

| **Share of the 2026/27 Surplus/(Deficit)** | **Council Tax £m** | **NNDR £m** | **TOTAL £m** |
|---|---|---|---|
| Bury MBC | (£2.856) | (£2.715) | **(£5.571)** |
| Police and Crime Commissioner | (£0.381) | | **(£0.381)** |
| General Mayoral - Fire and Rescue Service | (£0.168) | (£0.027) | **(£0.195)** |
| **Surplus/(Deficit) as at 31.03.2027** | **(£3.406)** | **(£2.742)** | **(£6.148)** |

5.4. The £6.148m forecast deficit on the collection fund mainly reflects the impact of the variance created by the payment of the estimated surplus position for 2025/26 of £3.924m (being paid per Regulations in 2026/27) and the actual 2025/26 outturn deficit position of £2.233m brought forward into 2026/27.

5.5. The position also reflects an increase in the allowance for impairment of arrears mostly driven by an increase in Council Tax arrears. The Council is continuing to take action to reduce arrears across both Council Tax and Business Rates.

5.6. The current in year collection for Council Tax is forecast to fall below the budgeted collection rate of 98%, largely due to the cost-of-living pressures affecting residents.

| **Collection Rates** | **Council Tax %** | **NNDR %** |
|---|---|---|
| 2026/27 Target collection rate | 98.00 | 98.00 |
| 2025/26 | 95.26 | 96.87 |
| 2024/25 | 95.59 | 96.55 |
| 2023/24 | 95.25 | 93.88 |
| 2022/23 | 94.99 | 92.73 |
| 2021/22 | 95.77 | 93.73 |
| 2020/21 | 96.01 | 87.63 |
| 2019/20 | 96.39 | 95.37 |
| 2018/19 | 96.49 | 96.23 |
| 2017/18 | 96.62 | 96.04 |

5.7. Despite the in-year collection forecast rate being below the budgeted rate, the Council's recent performance compares favourably with regional trend, with a net improvement in Council Tax collection rates over the last three years and a strong increase in Business Rates over the same period.

## 6. Housing Revenue Account (HRA) Outturn position

6.1. The table below shows the overall forecast position on the HRA for 2026/27, which is for an underspend of £0.059m.

| HRA INCOME AND EXPENDITURE STATEMENT | 2026/27 Quarter 1 Revised Budget | 2026/27 Quarter 1 Forecast | Variance | Variance |
|---|---|---|---|---|
| | £m | £m | £m | % |
| **INCOME** | | | | |
| Dwelling Rents | (£38.633) | (£38.406) | £0.228 | 99.41% |
| Non-dwelling Rents | (£0.219) | (£0.181) | £0.038 | 82.65% |
| Other Charges for Services and Facilities | (£1.126) | (£1.145) | (£0.019) | 101.69% |
| Contributions Towards Expenditure | (£0.005) | (£0.005) | - | 100.00% |
| **Total Income** | **(£39.983)** | **(£39.737)** | £0.247 | **99.38%** |
| **EXPENDITURE** | | | | |
| Repairs and Maintenance | £11.409 | £11.359 | (£0.050) | 99.56% |
| Supervision and Management | £12.699 | £12.412 | (£0.287) | 97.74% |
| Special Services | £1.333 | £1.365 | £0.032 | 102.40% |
| Rents, Rates, Taxes, and Other Charges | £0.200 | £0.200 | - | 100.00% |
| Depreciation of Non-Current Assets | £9.167 | £9.167 | - | 100.00% |
| Debt Management Expenses | £0.045 | £0.045 | - | 100.00% |
| Movement in Provision for Bad Debts | £0.565 | £0.565 | - | 100.00% |
| **Total Expenditure** | **£35.418** | **£35.113** | **(£0.305)** | **101.43%** |
| | | | | |
| HRA Services' Share of Corporate and Democratic Core | £0.384 | £0.384 | - | 100.00% |
| **Net Income or Expenditure of HRA Services** | **(£4.181)** | **(£4.240)** | **(£0.059)** | **101.41%** |
| | | | | |
| Interest Payable and Similar Charges | £5.248 | £5.248 | - | 100.00% |
| Interest and investment income | (£0.664) | (£0.664) | - | 100.00% |
| **(Surplus) or Deficit for the Year on HRA Services** | **£0.403** | **£0.344** | **(£0.059)** | **85.36%** |
| | | | | |
| **APPROPRIATIONS** | | | | |
| Reversal of Depreciation | (£9.167) | (£9.167) | - | |
| Transfer to the Major Repairs Reserve | £9.167 | £9.167 | - | |
| Repayment of Arranged Loans | £0.178 | £0.178 | - | 100.00% |
| Capital Expenditure Funded by the HRA | £8.500 | £8.500 | - | 100.00% |
| **Total Appropriations** | **£8.678** | **£8.678** | **-** | **100.00%** |

6.2. The current forecast position for the HRA will slightly reduce the contribution from the HRA Reserve that was budgeted to be required for 2026/27 by £0.059m. Details of significant variances include:

6.2.1. Dwelling rents – forecast to be £0.228m lower than budget – partial reason for this will be the increased number of Right to Buy (RTB) sales which completed during the first quarter, totalling 28 against a full-year budgeted forecast of 18. If the backlog of RTB cases falls now as anticipated, and there are fewer new applications, then this forecast may improve to an extent. The positive side of this is that the authority will receive a higher level of Capital Receipts than budgeted for, with which to support future HRA development opportunities.

6.2.2. Service Charges and Non-Dwelling Rents – there are swings and roundabouts with service charges currently forecast to out-perform budget slightly by £0.019m, whilst non-dwelling rent income is forecast to under-perform by £0.039m. Service charge analysis continues to be a key area of focus, to ensure that current service charges are being set at the right level, with future aims of examining if there are any areas where we don't raise service charges but could or should.

6.2.3. Repairs and Maintenance – currently showing a small under-spend of circa £0.050m, on a £11.409m budget (0.44%), which although in itself appears favourable masks some significant challenges still within the service:

- Disrepairs – there has been a national trend seeing increasing numbers of disrepair claims being made. The overspend in 2025/26 was £0.276m, and although additional resource was put into the 2026/27 budget this area still needs close monitoring as the number of cases have significantly increased over the past few years.
- Sub-contractor spend – there was a significant increase in the level of sub-contractor spend over the first few months of the year. This has led to some in-depth analysis of that spend to try and understand the key drivers for the increase, and to provide a focus for getting these costs under closer control. Currently forecast to overspend in total by £0.350m.
- Vacancies – to offset some of the sub-contractor spend several permanent vacancies across the service are being held open. At some point this issue will need to be crystallised to understand the impact that directly recruiting more staff could have on the forecast external sub-contractor overspend.

6.2.4. Supervision and Management is forecast to underspend by £0.288m, due to several factors:

- Delays in recruiting staff to vacancies which generates some short-term savings, currently estimated at £0.110m.
- Expected savings in relation to review of Central Support Recharges.

6.2.5. Special Services forecasting small overspend of £0.032m due to some additional revenue compliance costs having to be met.

6.3. The revised HRA Capital Programme including slippage from 2025/26 is £36.215m as detailed in the table below. The final forecast spend currently stands at £31.767m which will require re-programming or re-phasing of £4.448m of programme spend and financing into 2026/27 and beyond.

| CAPITAL PROGRAMME | 2026/27 Revised Budget | 2026/27 Quarter 1 Forecast | Variance | Variance |
|---|---|---|---|---|
| | £m | £m | £m | % |
| **CAPITAL EXPENDITURE** | | | | |
| Major Works & Imps | £17.175 | £13.107 | (£4.068) | 76.31% |
| Other Capital Spend | £5.945 | £5.945 | - | 100.00% |
| New Build Development Costs | £3.118 | £3.118 | - | 100.00% |
| Disabled Adaptations | £1.598 | £1.218 | (£0.380) | 76.22% |
| Carbon Reduction Schemes | £8.379 | £8.379 | - | 100.00% |
| **Total Capital Expenditure** | **£36.215** | **£31.767** | **(£4.448)** | **87.72%** |
| **CAPITAL FINANCING** | | | | |
| Prudential Borrowing | (£15.280) | (£10.832) | £4.448 | 61.29% |
| External Funding | (£0.150) | (£0.150) | - | 100.00% |
| Capital Receipts | (£3.118) | (£3.118) | - | 100.00% |
| HRA Direct Revenue Financing | (£8.500) | (£8.500) | - | 100.00% |
| HRA Major Repairs Reserve | (£9.167) | (£9.167) | - | 100.00% |
| **Total Capital Financing** | **(£36.215)** | **(£31.767)** | **£4.448** | **87.72%** |
| **Total Capital Programme** | **-** | **-** | **-** | |

6.4. The HRA Reserve movements are detailed in the table below. When the budget was approved in February 2026, the closing HRA balance was forecast to be £18.386m. However, outturn performance was better than anticipated, resulting in an actual HRA balance of £19.861m as at 31 March 2026.

| MOVEMENT on the HRA RESERVE | 2026/27 Feb 26 Budget | 2026/27 Quarter 1 Forecast | Variance |
|---|---|---|---|
| | £m | £m | £m |
| **Balance on the HRA at the End of the Previous Reporting Period** | **(£18.386)** | **(£19.861)** | **(£1.475)** |
| (Surplus) or Deficit for the Year on the HRA Income and Expenditure Statement | £0.403 | £0.344 | (£0.059) |
| Appropriations | £8.678 | £8.678 | - |
| **Net (Increase) or Decrease before Transfers to or from Reserves** | **£9.081** | **£9.022** | **(£1.534)** |
| Transfers to/(from) Earmarked Reserves | - | - | - |
| **(Increase) or Decrease in Year on the HRA** | **£9.081** | **£9.022** | **(£1.534)** |
| **Balance on the HRA at the End of the Current Reporting Period** | **(£9.305)** | **(£10.839)** | **(£1.534)** |

## 7. Dedicated Schools Grant Outturn position

7.1. The DSG is broken down into 4 components and Bury's allocations from March 2026 publications before recoupment and deductions for 2026/27 are as follows:

| | March 2026 Published Allocation £m | Forecast Variance 2026/27 £m |
|---|---|---|
| Schools Block | £176.712 | - |
| Central Services Block | £1.175 | - |
| Early Years Block | £39.465 | - |
| High Needs Block | £53.582 | £10.287 |
| **Total** | **£270.934** | **£10.287** |

7.2. The Schools Block and Early Years Block are almost entirely passported to schools and early years providers. The Central Services Block is used to fund central services funded by Bury. There is little variance in this area. The major risk to the Council is the High Needs Block (HNB).

7.3. The HNB spending and allocations are subject to numerous funding regulations. These regulations are described in full within the Department of Education (DfE) High Needs Funding Guidance, which can be found via this link - High needs funding: 2026 to 2027 operational guide - GOV.UK

7.4. The HNB covers Special Educational Needs (SEN) funding for pupils aged 0 to 25 irrespective of which setting they attend. The broad headings for the HNB 2026/27 budget and forecast outturn position are shown below:

| High Needs Block (HNB) | 2026/27 Forecast £m |
|---|---|
| Specials Schools and Pupil Referral Unit (PRU) | £24.468 |
| Resourced Provision within Mainstream Schools | £2.916 |
| Early Years Funding | £0.275 |
| SEN Funding within Mainstream Funding (EHCP's) | £11.597 |
| Independent (Out Borough) Special Schools | £17.818 |
| Post 16 Commissioned Places | £2.400 |
| Alternative Provision | £4.789 |
| SEN Support Services | £1.087 |
| **Total Expenditure** | **£65.350** |
| High Needs Block Allocation | (£53.582) |
| School Block Transfer | (£0.481) |
| Health Service Contribution | (£1.000) |

| | |
|---|---|
| **Total Income** | **(£55.063)** |
| Balance | £10.287 |
| **Deficit b/fwd. from 2025/26** | **£20.285** |
| **High Needs Stability Grant estimate 2026/27** | **(£19.157)** |
| **Forecast in year deficit** | **£10.287** |
| **Estimated deficit c/fwd to 2027/28** | **£11.416** |

7.5. The DSG overall deficit at the beginning of the 2025/26 financial year brought forward was £20.285m, pre-audited figure. The service continues to work on making savings where possible, whilst continuing to face increasing demand which is a national pressure. The forecast 2026/27 DSG deficit position is £10.287m.

7.6. The formula for Local Authorities for the grant this year is:

**High Needs Stability Grant = 90% × Eligible DSG Deficit**

7.6.1 Where the **Eligible DSG Deficit** is the DSG deficit in the unusable reserve at 31 March 2026, adjusted for:

- Exclude any ineligible expenditure or charges
- Net off any DSG surpluses
- For former Safety Valve authorities, take account of previous Safety Valve payments and agreed local contributions.

7.6.2 This will be paid on the eligible balance as at 31st March 2026 subject to an approved local SEND reform plan (Bury submitted their plan in June 2026 prior to the deadline and is awaiting outcome).

7.6.3 The estimated grant allocation for Bury is £19.157m, which is included in the above table.

7.7. The majority of local authorities continue to face serious budgetary pressures and deficits which have been building over a number of years due to:

- The HNB allocations not being increased for the rises in pupil numbers.
- The percentage of pupils with SEN needs has been increasing but has not been reflected within allocations.
- The HNB becoming responsible for 19- to 25-year-olds without any additional funding.
- LA’s own provision being at full capacity meaning there is more reliance on expensive independent special school’s fees.
- Inflationary pressures being greater than the increase’s in HNB funding.

7.8. **Maintained school balances**:

| Maintained school balances | School Balances At 31/03/26 £m |
|---|---|
| Nursery | £0.11 |
| Primary | £0.08 |
| Secondary | £1.17 |
| Special | £0.93 |
| **Total** | **£2.29** |

7.9. The number of schools which are in a deficit position reduced from 12 at the end of 2024/25 to 9 at the end of the 2025/26 financial year.

7.10. Schools are required to adhere to their budget limits, but in the event of an unplanned deficit occurring this will be deducted from the following year's budget share. Schools that can't produce a balanced budget for 2026/27 can request approval to set a deficit budget by submitting a deficit recovery management plan to the Executive Director of Children and Young People. The deficit should normally be recovered within two to three years.

7.11. Of the 9 schools ending 2025/26 with a deficit:
- 7 already have an approved deficit recovery plan, 2 of which are subject to review;
- 1 plan is currently being prepared before submission for approval;
- 1 is converting to academy status during the summer term.

7.12. The Director of Education has introduced Finance Improvement Group meetings with schools facing challenges in setting a balanced budget.

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**Links with the Corporate Priorities:**

Financial management is a key part of the council's overall governance and control arrangements and the close monitoring of agreed income and expenditure; revised forecasts of future budget pressures and opportunities; and regular reporting of these issues underpin the council's three clear corporate priorities as set out in the Let's Do It Strategy that will deliver financial sustainability for the Council.

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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.

**Environmental Impact and Considerations:**

This is a finance update report as such there are no environmental impacts associated with this report.

**Assessment and Mitigation of Risk:**

| **Risk / opportunity** | **Mitigation** |
|---|---|
| The Council has insufficient funds to support its expenditure. | Regular reporting and tight budgetary control by budget holders support the Council in managing the overall financial risks and financial planning for the Council. |

**Legal Implications:**

This report provides Members with details of the quarter one financial position; there are no specific legal considerations in this report.

**Financial Implications:**

The financial implications are included within the Report.

**Appendices: Appendix 1 - Prudential Indicators Quarter 1**

**Background papers:**

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

*The Council's Revenue Budget and Medium Term Financial Plan*

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

| Term | Meaning |
|---|---|
| CIPFA | Chartered Institute of Public Finance and Accountancy |
| DfE | Department for Education |
| DRF | Direct Revenue Financing |
| DSG | Dedicated Schools Grant |
| EHCP | Education, Health and Care Plan |
| GMCA | Greater Manchester Combined Authority |
| LGFS | Local Government Finance Settlement |
| MRR | Major Repairs Reserve |
| MTFS | Medium Term Financial Strategy |
| NNDR | National Non-Domestic Rates |
| PRU | Pupil Referral Unit |
| PSV | Project Safety Valve |
| RCCO | Revenue Contributions to Capital Outlay |
| SEN | Special Educational Needs |

# Prudential Indicators Q1 2026/27

The Authority measures and manages its capital expenditure, borrowing and commercial and service investments (where applicable) with references to the following indicators.

It is now a requirement of the CIPFA Prudential Code that these are reported on a quarterly basis.

**Capital Expenditure:** The Authority has undertaken and is planning capital expenditure as summarised below:

**Table 1: Capital Expenditure**

| Description | 2025/26 actual | 2026/27 forecast | 2027/28 forecast | 2028/29 forecast |
|---|---|---|---|---|
| General Fund services | 81.240 | 96.225 | 27.778 | 11.080 |
| Council housing (HRA) | 19.174 | 36.215 | 23.056 | 16.549 |
| Non-Financial Investments | 0.000 | 0.000 | 0.000 | 0.000 |
| **Total** | **100.413** | **132.440** | **50.834** | **27.629** |

The original forecast for 2026/27 approved as part of the Capital Strategy 2026/27-2028/29 on 25 February 2026 was £110.212. Refer to Section 4 for a breakdown of the budget variances and movements from the February 2026 position to Quarter 1.

**Capital Financing Requirement:** The Authority's cumulative outstanding amount of debt finance is measured by the capital financing requirement (CFR). This increases with new debt-financed capital expenditure and reduces with Minimum Revenue Provision (MRP), Loan Repayments and capital receipts used to replace debt.

**Table 2: Capital Financing Requirement**

| Description | 31.3.2026 actual | 31.3.2027 forecast | 31.3.2028 forecast | 31.3.2029 forecast |
|---|---|---|---|---|
| General Fund services | 244.564 | 285.031 | 281.881 | 292.819 |
| Council housing (HRA) | 127.324 | 142.662 | 149.486 | 149.486 |
| Non-Financial Investments | 65.683 | 58.000 | 62.986 | 62.437 |
| Other Debt Liabilities | 9.958 | 8.258 | 7.344 | 6.393 |
| **TOTAL CFR** | **447.529** | **493.951** | **501.697** | **511.135** |

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

**Table 3: Gross Debt and Capital Financing Requirement**

| Description | 31.3.2026 actual | 31.3.2027 forecast | 31.3.2028 forecast | 31.3.2029 forecast |
|---|---|---|---|---|
| Debt (incl. PFI & leases) | 365.671 | 371.369 | 379.114 | 417.594 |
| Capital Financing Requirement | 447.529 | 493.951 | 501.697 | 511.135 |

**Debt and the Authorised Limit and Operational Boundary:** The Authority is legally obliged to set an affordable borrowing limit (also termed the Authorised Limit for external debt) each year. In line with statutory guidance, a lower "operational boundary" is also set as a warning level should debt approach the limit.

**Table 4: Debt and the Authorised Limit and Operational Boundary**

| Description | Debt at 30.6.26 | Maximum debt Q1 2026/27 | 2026/27 Authorised Limit | 2026/27 Operational Boundary | Complied With Y/N |
|---|---|---|---|---|---|
| Borrowing | 365.671 | 405.439 | 495.523 | 485.523 | |
| PFI and Finance Leases | 9.958 | 9.958 | 10.129 | 9.129 | |
| **Total debt** | **375.629** | **415.397** | **505.652** | **494.652** | **Yes** |

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

**Proportion of Financing Costs to Net Revenue Stream:** Although capital expenditure is not charged directly to the revenue budget, interest payable on loans and MRP/Loan Repayments are charged to revenue.

The net annual charge is known as financing costs; this is compared to the net revenue stream i.e. the amount funded from Council Tax, business rates and general government grants.

**Table 5: Proportion of Financing Costs to Net Revenue Stream**

| Description | 2025/26 actual | 2026/27 forecast | 2027/28 forecast | 2028/29 forecast |
|---|---|---|---|---|
| Proportion of net revenue stream (General Fund) | 2.41% | 6.66% | 5.28% | 4.80% |
| Proportion of net revenue stream (HRA) | 9.99% | 11.53% | 11.87% | 11.83 |

**Treasury Management Indicators**:

**Maturity structure of borrowing**: This indicator is set to control the Council's exposure to refinancing risk. The upper and lower limits on the maturity structure of borrowing will be:

**Table 6 Maturity Structure of fixed rate borrowing**

| Maturity structure of fixed rate borrowing | 31/03/26 £m | 31/03/26 % | 31/03/27 Forecast £m | 31/03/27 Forecast % |
|---|---|---|---|---|
| Under 12 months | **£64.072** | 17.52% | | 0% |
| 12 months and within 24 months | **£50.522** | 13.82% | **77.550** | 21% |
| 24 months and within 5 years | **£65.567** | 17.93% | **54.221** | 15% |
| 5 years and within 10 years | **£111.987** | 30.63% | **150.342** | 40% |
| 10 years and Over | **£73.521** | 20.11% | **89.256** | 24% |
| **Total Debt** | **£365.671** | **100.00%** | **£371.369** | **100.00%** |

**Liability Benchmark:** This indicator compares the Authority's actual existing borrowing against a liability benchmark that has been calculated to show the lowest risk level of borrowing. The liability benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future and so shape its strategic focus and decision making. It represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments at the minimum level of £10m required to manage day-to-day cash flow.

**Table 7 Liability Benchmark:**

| Description | 31-Mar-2026 Actual £m | 31-Mar-2027 Forecast £m | 31-Mar-2028 Forecast £m |
|---|---|---|---|
| Loans CFR | £437.200 | £472.500 | £481.100 |
| Less: Balance sheet resources | (£86.100) | (£86.100) | (£86.100) |
| **Net loans requirement** | **£351.100** | **£386.400** | **£395.000** |
| Plus: Liquidity allowance | £10.000 | £10.000 | £10.000 |
| **Liability benchmark** | **£361.100** | **£396.400** | **£405.000** |
| **Existing borrowing** | **£365.671** | **£371.369** | **£379.114** |

Following on from the medium-term forecast above, the long-term liability benchmark assumes capital expenditure funded by borrowing of approximately £15m a year, minimum revenue provision on new capital expenditure based on a 25-year asset life and income, expenditure and reserves all increasing by inflation of 2.5% p.a. This is shown in the chart below.

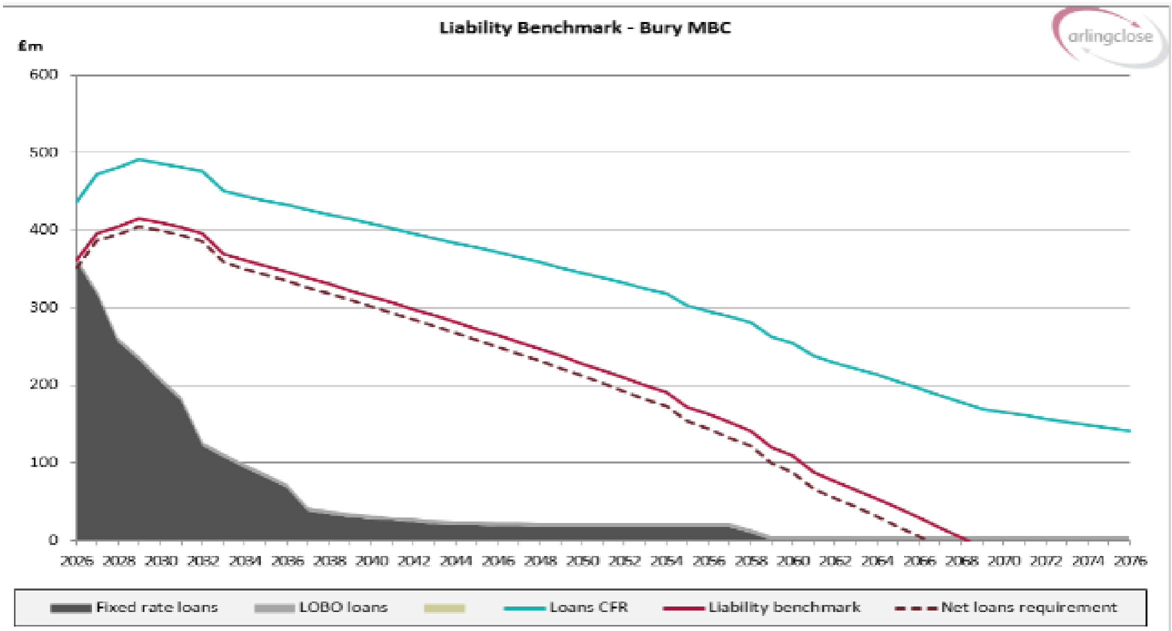

**Chart Key:**

**Fixed rate loans** - The grey shaded area represents the Council's existing loans and shows their current maturity profile.

**Loans CFR** - The blue line is calculated in accordance with the loans CFR definition in the Prudential Code and represents the Council's underlying need to borrow for capital spending that has not yet been financed by other means.

**Net Loans Requirement** - The dotted red line is based upon the CFR but factors in other balance sheet resources, such as cash-backed reserves and working capital. These balances improve the Council's cash position and enable it to maintain an under-borrowed position by not externally borrowing up to the full CFR, thus saving on interest costs. Should these resources decrease (for example if reserves are used up) then this line will be raised closer to the loans CFR suggesting that more borrowing is needed.

**Liability Benchmark** - The solid red line is the Council's net loans requirement plus short-term liquidity allowance (a notional buffer of £10m) for cashflow purposes. This is the level of borrowing the Council will need in order to maintain this desired cash position.

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Agenda Item 18

Bury Council

| Classification: Open | Decision Type: Non-Key |
|---|---|

| | | |
|---|---|---|
| **Report to:** | Cabinet and Overview and Scrutiny | **Date:** 09 September 2026 |
| **Subject:** | 2025/26 Treasury Management Outturn | |
| **Report of** | Cabinet Member for Finance and Transformation | |

## 1 Summary

1.1 The report outlines the financial position and provides an update on the following aspects of the Treasury Management function throughout 2025/26.

The report covers:

- An economic update for 2025/26.
- An update of the Council's current treasury management position.
- Council Borrowing.
- Treasury Investment Activity.
- Non-Treasury Investments.
- Treasury Performance for 2025/26.
- Treasury Management Prudential Indicators.

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

**Recommendation(s)**

1.3 Cabinet is recommended to:

- Note and approve for onward submission to Council on 16th September 2026, the:
  - Treasury Management 2025/26 Outturn Report.
  - 2025/26 Prudential and Treasury Indicators.

1.4 Council is asked to:

- Note the:
  - Treasury Management 2025/26 Outturn Report.
  - 2025/26 Prudential and Treasury Indicators.

**Reasons for recommendation(s)**

1.5 It is a requirement of the CIPFA Code that the Council receives an annual Treasury Management Outturn Report. It should be noted that the Council met all its Prudential Indicators relating to Treasury Management in financial year 2025/26.

**Alternative options considered and rejected**

1.6 Regular reporting to members on the Council's Treasury Management arrangements, controls and performance forms a key element of its overall governance and financial administration. Given this, no alternative options were considered when preparing this report.

## 2 Introduction

2.1 The Council has adopted the Chartered Institute of Public Finance and Accountancy's Treasury Management in the Public Services: Code of Practice (the CIPFA Code) which requires the Council to approve, as a minimum, treasury management semi-annual and annual outturn reports.

2.2 This report includes the requirement in the 2021 Code, mandatory from 1 April 2023, of reporting of the treasury management prudential indicators.

2.3 The Council's Treasury Management Strategy for 2025/26 was approved by Council at the Budget Council meeting on 19 February 2025, a further update to the Treasury Management Strategy was approved by Council on 25 February 2026.

2.4 The Council has borrowed and invested substantial sums of money and is therefore exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of risk remains central to the Council's treasury management strategy.

## 3 Economic update for 2025/26

3.1 The financial year was largely dominated by two significant events that created uncertainty and volatility. The first being the US trade tariff in April 2025 and the second was the escalation of conflict involving the US/Israel and Iran at the end of February 2026.

3.2 After the initial fallout from US trade tariffs, the following months saw some improvements as equity markets made gains and bond yields eased modestly. However, in the UK this trend in bond yields reversed somewhat as an uncertain economic outlook together with concerns around the government's fiscal position and Autumn budget saw investors demanding a higher return for holding gilts for longer periods.

3.3 The UK Spring Budget delivered in March 2026 was deliberately lower key with no major tax changes and no big policy shifts. This helped UK markets perform better with gilt yield trending downwards, inflation easing and expectation for cut in the Bank of England interest rate. However, the outbreak of war between the US/Israel and Iran in late February 2026 drove sharp increases in oil and commodity prices due to disrupted shipping routes, leaving the global economic outlook highly uncertain, particularly regarding inflation and policy responses.

3.4 UK consumer prices inflation (CPI) was generally trending downward before the War, prior to the war was trending downwards, albeit the 3% in February 2026 remained unchanged from January. The core measure of CPI, i.e. excluding food and energy, also remained at 3.1%. Inflation was expected to fall further over the coming months to the Bank of England's 2% target. However, due to the impact of the war, inflation is now expected to rise again. The extent and the pace will depend largely on the duration of the war and how long commodity prices remain elevated.

3.5 The Office for National Statistics (ONS) reported that the UK economy grew by 0.1% in Q4 2025, following modest increases of 0.2% and 0.1% in Q3 with subsequent data showing that the GDP recorded no growth in January 2026. However, as these data precedes the onset of the US war with Iran the associated economic impact will only become evident in the future official releases by the ONS.

3.6 During financial year 2025/26 labour market figures were slightly better than expected, the general trend has been one of persistent weakness. In the three months to January 2026, the unemployment rate rose to 5.2% (from 5.1%), while the employment rate held at 75.1%. Despite inflation being expected to rise in the coming months, labour market conditions remain loose and so any upward pressure on wages from general inflation is likely to be tempered by the weaker labour market environment.

3.7 The Bank of England (BoE) reduced the Bank Rate from 4.00% to 3.75% in December 2025. In February 2026, BoE's Monetary Policy Committee (MPC) voted 5-4 to hold rates at 3.75%. In February 2026, the Monetary Policy Committee (MPC) voted narrowly (5–4) to maintain the rate at 3.75%, followed by a unanimous decision to hold rates again in March. Prior to the outbreak of the conflict in the Middle East, financial markets had anticipated a further reduction to 3.5% at the March meeting. However, the escalation of geopolitical tensions significantly altered expectations. The MPC highlighted increased uncertainty, noting risks to both inflation and economic growth, and indicated that future policy could involve either tightening or easing depending on evolving conditions. In response, financial markets rapidly adjusted their outlook by pricing in rate hikes.

3.8 Following the March MPC meeting, Arlingclose, the authority's treasury adviser, revised its central interest rate view and now predicts Bank Rate will be held at 3.75%. However, the conflict makes the outlook for rates highly uncertain. In the short-term the risks are to the upside with the chance of higher Bank Rate should the MPC decide it wishes to quickly quash potential second-round effects from higher inflation. Further out, if Bank Rate is hiked quickly, the pace and magnitude of subsequent cuts could take it far lower than was previously anticipated as policymakers add significant stimulus to a much weaker economic growth outlook.

3.9 The US Federal Reserve had been easing monetary policy over the period, lowering the target range for the federal funds rate by 0.25 percentage points to 3.50%–3.75% at its December meeting. At the three subsequent meetings, the Committee opted to hold rates within this range. Policymakers noted that, although inflation remained elevated, economic activity continued to expand. However, the outbreak of war with Iran introduced significant uncertainty regarding the future path of monetary policy. Despite this heightened uncertainty, the Federal Reserve continued to signal that further rate cuts were likely in 2026 and 2027.

3.10 The European Central Bank (ECB) has kept its key policy rates unchanged since June 2025, maintaining the deposit facility rate at 2.00% and the main refinancing rate at 2.15%. At its March 2026 meeting, the ECB emphasised that the conflict in the Middle East had substantially increased uncertainty. It highlighted the emergence of upside risks to inflation alongside downside risks to economic growth, prompting an upward revision to its inflation forecasts.

Financial markets

3.11 The financial market declined sharply in the financial year following the announcement of the US tariffs, sentiments in the financial markets had improved but the bond and equity market remained volatile throughout. However, the latter part of quarter 4 was dominated by the escalation of the US/Israel war with Iran which saw the equity market fall sharply, and bond yields rise because of the inflationary impact from higher oil and commodity prices outweighed the flight-to-quality into government bonds often see during conflicts.

3.12 Equity markets had been recovering following the declines seen during the April sell-off; however, the outbreak of war reversed this trend, leading to another sharp drawdown. Both the FTSE 100 and FTSE 250 fell by approximately 10% over the month from the onset of the conflict to the end of the financial year.

3.13 The period was also characterised by significant volatility in gilt yields. The 10-year UK benchmark gilt yield began the year at 4.65% and ended at 4.86%, having fallen to a low of 4.23% and risen to a high of 4.95% within the space of a month. A similar pattern was observed for the 20-year gilt, which started the year at 5.18% and ended at 5.45%, with yields ranging between 4.92% and 5.55%. The Sterling Overnight Index Average (SONIA) averaged 4.01% over the 12 months to 31 March.

Credit review

3.14 Arlingclose maintained its recommended maximum unsecured duration limit on most of the banks on its counterparty list at 6 months. The other banks remain on 100 days. Earlier in the period, Fitch upgraded NatWest Group and related entities to AA- from A+ and placed Clydesdale Bank’s long-term A- rating on Rating Watch Positive. Fitch later upgraded Clydesdale Bank and HSBC, but downgraded Lancashire CC and Close Brothers.

3.15 Moody's affirmed OP Corporate's rating at Aa3 in May 2025. Later in the period, Moody's upgraded Transport for London, Allied Irish Banks, Bank of Ireland, Toronto-Dominion Bank, DZ Bank, Nordea and HSBC and downgraded Close Brothers. In the last quarter of 2025 S&P upgraded Clydesdale Bank, Allied Irish Banks and Bank of Ireland, and assigned Warrington Council a BBB+ rating.

3.16 After spiking in April 2025 following the US trade tariff announcements, UK credit default swap (CDS) prices had trended down before picking up modestly in October and November. After declining again in December and into the new calendar year, they rose sharply once again when the war in the Middle East started. They were still elevated at the end of the period, but prices for all banks on Arlingclose's counterparty list remained within limits deemed satisfactory for maintaining credit advice at current durations.

3.17 Overall, European banks' CDS prices have generally been flatter and lower compared to the UK, as have Singaporean and Australian lenders while some Canadian bank CDS prices have remained elevated since the beginning of the period in part due to ongoing trade tensions with the US.

3.18 Financial market volatility is expected to remain, and CDS levels will be monitored for signs of ongoing credit stress. As ever, the institutions and durations on the Authority's counterparty list recommended by Arlingclose remain under constant review.

<u>Capital Expenditure and Financing</u>

3.19 The Council undertakes capital expenditure on long-term assets. These activities may either be:

- Financed immediately through the application of capital or revenue resources (capital receipts, capital grants, revenue contributions etc.), which has no resultant impact on the Council's borrowing need; or
- If insufficient financing is available, or a decision is taken not to apply resources, the capital expenditure will give rise to a borrowing need.

3.20 The actual capital expenditure in each financial year forms one of the required prudential indicators. The table below shows the actual expenditure and how this was financed.

**Table 1 Capital Expenditure & Financing**

| Capital Expenditure & Financing | 2024/25 Actual £m | 2025/26 Budget (Feb 25) £m | 2025/26 Revised Budget (Feb 26) £m | 2025/26 Actual £m |
|---|---|---|---|---|
| **Capital Expenditure:** | | | | |
| Non-HRA | £43.491 | £91.214 | £94.615 | £81.240 |
| HRA | £15.825 | £29.522 | £25.000 | £19.174 |
| Policy/Non-Financial Investments | £0.498 | £0.000 | £0.000 | £0.000 |
| **Total Capital Expenditure** | **£59.814** | **£120.736** | **£119.615** | **£100.413** |
| **Resources:** | | | | |
| External Funding | £32.716 | £52.048 | £38.621 | £33.528 |
| Capital Receipts | £7.740 | £9.864 | £5.714 | £9.554 |
| HRA (DRF/MRR) | £7.401 | £7.330 | £8.988 | £8.072 |
| GF (RCCO) | £0.833 | £0.014 | £0.089 | £0.010 |
| **Total Resourced by:** | **£48.690** | **£69.256** | **£53.412** | **£51.164** |
| | | | | |
| **Financing Requirement** | **£11.124** | **£51.480** | **£66.203** | **£49.249** |

3.21 The Council's underlying need to borrow to finance capital expenditure is termed the Capital Financing Requirement (CFR). This figure is a gauge of the Council's indebtedness. The CFR results from the capital activity of the Council and resources used to pay for the capital spend. It represents the 2025/26 unfinanced capital expenditure (see above table), and prior years' net or unfinanced capital expenditure which has not yet been paid for by revenue or other resources.

3.22 Part of the Council's treasury activities is to address the funding requirements for this borrowing need. Depending on the capital expenditure programme, the treasury service organises the Council's cash position to ensure that sufficient cash is available to meet the capital plans and cash flow requirements. This may be sourced through borrowing from external bodies, (such as the Government, through the Public Works Loan Board [PWLB], or the money markets), or utilising temporary cash resources within the Council.

3.23 The Council's (non HRA) underlying borrowing need (CFR) is not allowed to rise indefinitely. Statutory controls are in place to ensure that capital assets are broadly charged to revenue over the life of the asset. The Council is required to make an annual revenue charge, called the Minimum Revenue Provision – MRP, to reduce the CFR. This is effectively a repayment of the non-Housing Revenue Account (HRA) borrowing need, (there is no statutory requirement to reduce the HRA CFR). This differs from the treasury management arrangements which ensure that cash is available to meet capital commitments. External debt can also be borrowed or repaid at any time, but this does not change the CFR.

3.24 The total CFR can also be reduced by:

- The application of additional capital financing resources, (such as unapplied capital receipts); or
- Charging more than the statutory revenue charge (MRP) each year through a Voluntary Revenue Provision (VRP).

The Council's 2025/26 MRP Policy, (as required by MHCLG Guidance), was approved as part of the Treasury Management Strategy Report for 2025/26 on 25 February 2025.

The Council's CFR for financial year 2025/26 is shown below and represents a key prudential indicator. It includes PFI and leasing schemes on the balance sheet, which increase the Council's borrowing need. No borrowing is actually required against these schemes as a borrowing facility is included in the contract (if applicable).

3.25 Borrowing activity is constrained by prudential indicators for gross borrowing and the CFR, and by the authorised limit.

**Table 2 - Capital Financing Requirement**

| **Capital Financing Requirement** | **2024/25 Actual £m** | **2025/26 Budget (Feb 25) £m** | **2025/26 Revised Budget (Feb 26) £m** | **2025/26 Actual £m** |
|---|---|---|---|---|
| CFR – Non HRA | £203.941 | £257.725 | £256.449 | £244.564 |
| CFR – HRA | £121.414 | £133.974 | £132.024 | £127.324 |
| CFR – Policy/Non-Financial Investments | £66.044 | £63.432 | £65.683 | £65.683 |
| CFR - Other Debt Liabilities | £11.173 | £0.000 | £9.958 | £9.958 |
| **TOTAL CFR** | **£402.572** | **£455.131** | **£464.114** | **£447.529** |
| Financing Requirement | £11.123 | £51.481 | £66.203 | £49.320 |
| MRP | (£4.070) | (£3.672) | (£3.447) | (£4.363) |
| Other Debt Liabilities Movements | £0.000 | £0.000 | (£1.215) | £0.000 |
| **Movement in CFR** | **£7.053** | **£47.809** | **£61.541** | **£44.957** |

3.26 Gross borrowing and the CFR - in order to ensure that borrowing levels are prudent over the medium term and only for a capital purpose, the Council should ensure that its gross external borrowing does not, except in the short term, exceed the total of the capital financing requirement in the current financial year 2025/26 and next two financial years. This essentially means that the Council is not borrowing to support revenue expenditure.

3.27 The table below highlights the Council's gross borrowing position against the CFR. The Council has complied with this prudential indicator. This indicator shows that the Council had some flexibility to borrow in advance of its immediate Capital needs.

**Table 3 - Actual Borrowing Compared to the CFR**

| **Description** | **2024/25 Actual £m** | **2025/26 Budget (Feb 25) £m** | **2025/26 Revised Budget (Feb 26) £m** | **2025/26 Actual £m** |
|---|---|---|---|---|
| Gross Borrowing Position | £295.266 | £373.749 | £370.498 | £365.671 |
| CFR | £402.572 | £455.131 | £464.114 | £447.529 |
| **(Under) / Over Funding of CFR** | **(£107.306)** | **(£81.382)** | **(£93.616)** | **(£81.858)** |

## 4 Treasury Position as at 31 March 2026

4.1 The treasury management position as at 31 March 2026 and the change during the year is shown in the table below:

**Table 4 -Treasury Position as at 31 March 2026**

| **Treasury Management Position** | **31-Mar-2025 Balance £m** | **Raised / Invested £m** | **Repaid / Realised £m** | **31-Mar-2026 Balance £m** | **Average Rate %** |
|---|---|---|---|---|---|
| **Borrowing** | | | | | |
| PWLB | £247.266 | £128.239 | (£71.834) | £303.671 | 3.50% |
| LOBOs | £13.000 | £0.000 | (£8.000) | £5.000 | 4.18% |
| Banks-Fixed | £5.000 | £0.000 | (£5.000) | £0.000 | 3.30% |
| Local Authorities | £30.000 | £63.500 | (£36.500) | £57.000 | 3.25% |
| **Total Borrowing** | **£295.266** | **£191.739** | **(£121.334)** | **£365.671** | |
| **Investments** | | | | | |
| Cash and Cash Equivalents | £20.700 | £841.376 | (£847.458) | £14.618 | 3.64% |
| **Total Investments** | **£20.700** | **£841.376** | **(£847.458)** | **£14.618** | |
| **Net Borrowing** | **£274.566** | **(£649.637)** | **£726.124** | **£351.053** | |

4.2 The maturity structure of the debt portfolio was as follows:

**Table 5 Maturity structure of fixed rate borrowing**

| Maturity structure of fixed rate borrowing | 2024/25 Actual £m | 2024/25 Actual % | 2025/26 Actual £m | 2025/26 Actual % |
|---|---|---|---|---|
| Under 12 months | £24.868 | 8.42% | £64.072 | 17.52% |
| 12 months and within 24 months | £30.423 | 10.30% | £50.522 | 13.82% |
| 24 months and within 5 years | £29.650 | 10.04% | £65.567 | 17.93% |
| 5 years and within 10 years | £80.526 | 27.27% | £111.987 | 30.63% |
| 10 years and Over | £129.800 | 43.96% | £73.521 | 20.11% |
| **Total Debt** | **£295.266** | **100.00%** | **£365.671** | **100.00%** |

4.3 The Council's investment portfolio was as shown below:

**Table 6 Investment Portfolio Description**

| Investment Portfolio Description | 31-Mar-2025 Investment Balance £m | Amount Invested In-year £m | Investments Realised In-year £m | 31-Mar-2026 Investment Balance £m |
|---|---|---|---|---|
| **Notice Accounts** | | | | |
| Barclays Bank - 32-day Notice account | £0.000 | £0.000 | £0.000 | £0.000 |
| Barclays Bank - 95-day Notice account | £0.000 | £0.000 | £0.000 | £0.000 |
| **Total Notice Accounts** | **£0.000** | **£0.000** | **£0.000** | **£0.000** |
| **Call Accounts** | | | | |
| Barclays Bank - Flexible Interest-Bearing Current Account | £0.330 | £77.081 | (£77.411) | £0.000 |
| Bank of Scotland - Call Account | £10.370 | £222.828 | (£228.960) | £4.238 |
| DMADF New Fixed Deposit account | £0.000 | £516.467 | (£506.087) | £10.380 |
| **Total Call Accounts** | **£10.700** | **£816.376** | **(£812.458)** | **£14.618** |

| Short Term Investments | | | | |
|---|---|---|---|---|
| Local Authorities | £10.000 | £25.000 | (£35.000) | £0.000 |
| **Total Short-Term Investments** | **£10.000** | **£25.000** | **(£35.000)** | **£0.000** |
| **Total Investments** | **£20.700** | **£841.376** | **(£847.458)** | **£14.618** |

4.4 All the Council's short-term investments are held for a period of up to 1 year.

## 5 Investment and Borrowing Strategy

5.1 CIPFA's 2021 Prudential Code is clear that local authorities must not borrow to invest primarily for financial return and that it is not prudent for local authorities to make any investment or spending decision that will increase the capital financing requirement and lead to new borrowing, unless directly and primarily related to the functions of the Council. PWLB loans are no longer available to local authorities planning to buy investment assets primarily for yield unless these loans are for refinancing purposes.

5.2 Bury MBC has not invested in assets primarily for financial return or that are not primarily related to the functions of the Council. It has no plans to do so in future.

5.3 The main objective when borrowing has been to strike an appropriately low risk balance between securing lower interest costs and achieving cost certainty over the period for which funds are required, with flexibility to renegotiate loans should the Council's long-term plans change being a secondary objective. The Council's borrowing strategy continues to address the key issue of affordability without compromising the longer-term stability of the debt portfolio.

5.4 Interest rates have seen substantial rises since 2021, many central banks have now begun to reduce their policy rates slowly. During 2025/26 Gilt yields slightly decreased, reflecting expectations of lower interest rates, a tepid economy and to some extent an improvement in the UK governments fiscal position following tax rises in the autumn budget. Subsequent to the war in the Middle East however, gilt yields saw a rapid rise to above the yield at the beginning of the financial year.

5.5 The PWLB certainty rates for maturity loans are detailed below: -

**Table 7 - PWLB BORROWING RATES AT YEAR END**

| Loan Term | 31 March 2025 | 31 March 2026 |
|---|---|---|
| 10-Year Rate | 5.62% | 5.92% |
| 20-Year Rate | 6.11% | 6.43% |
| 50-Year Rate | 5.87% | 6.28% |

5.6 The cost of short-term borrowing from other local authorities has generally decreased with Base Rate over the year. Interest rates averaged at around 4.45% in 2025/26.

5.7 The PWLB HRA rate, introduced on 15 June 2023, provides borrowing at a margin of 40 basis points below the Certainty Rate. This concessionary rate is available to support local authority borrowing within the Housing Revenue Account, including both new housing delivery and the refinancing of existing HRA debt. The Government has subsequently extended the availability of this preferential rate, which is currently confirmed through to March 2027, thereby providing continued support and greater certainty for HRA borrowing strategies.

5.8 As of 31st March 2026, the Council held £365.673m of loans, an increase of £70.404m on the previous year as part of its strategy for funding previous and current years' capital programmes. Outstanding loans on 31 March are summarised in 5.1 and 5.2 above.

## 6 Borrowing and Investment Outturn

Borrowing movement in-year

6.1 On 1 April 2025 the Council held £13m of LOBO (Lender's Option Borrower's Option) loans where the lender has the option to propose an increase in the interest rate at set dates, following which the Council has the option to either accept the new rate and terms or to repay the loan at no additional cost.

6.2 As market interest rates increased, the call option on one of the Council's LOBO loans (Dexia) was exercised during 2025/26. This resulted in the repayment of £8m, which was funded through the Council's internally managed cash balances rather than through new external borrowing.

6.3 Following advice from the Councils Treasury Adviser (Arlingclose), the Council rescheduled several PWLB loans in November 2025. The rescheduling enabled the Council to take advantage of discounts available for early repayments of selected loans. Replacement loans were then taken out where appropriate. This approach has resulted in an overall improvement in the Authority's borrowing position with an overall discount achieved of £13.61m which will be recognised annually over the next 10 years. The savings recognised in 2025/26 equates to £1.361m.

Treasury Investment Activity

6.4 The CIPFA Treasury Management Code defines treasury management investments as those investments which arise from the Council's cash flows or treasury risk management activity that ultimately represents balances that need to be invested until the cash is required for use during business.

6.5 As of 31 March 2026, the council held £14.618m of invested funds, representing income received in advance of expenditure plus balances and reserves held.

6.6 Both the CIPFA Code and government guidance require the Council to invest its funds prudently, and to have regard to the security and liquidity of its treasury investments before seeking the optimum rate of return, or yield. The Council's objective when investing money is to strike an appropriate balance between risk and return, minimising the risk of incurring losses from defaults and the risk of receiving unsuitably low investment income.

6.7 As demonstrated by the liability benchmark in this report, the Council expects to be a long-term borrower, and new treasury investments are therefore primarily made to manage day-to-day cash flows using short-term low risk instruments.

6.8 Bank Rate decreased by 0.75% over the period, from 4.50% at the beginning of April 2025 to 3.75% by the end March 2026.

6.9 The PWLB certainty rate for 10-year maturity loans was 5.38% at the beginning of the period and 5.72% at the end. The lowest available 10-year maturity certainty rate was 5.13% and the highest was 5.88%. Rates for 20-year maturity loans ranged from 5.71% to 6.37% during the period, and 50-year maturity loans from 5.46% to 6.24%. The cost of short-term borrowing from other local authorities has been similar to or a little above Base Rate for most of the period, with interest rates between 4.0% and 4.5%. However, as is commonly seen, rates rose higher towards the end of the financial year, with rates of 5.0% - 7.0% being seen.

6.10 Financial market sentiment was reasonably positive over most of the 2025/26 financial year, but economic, financial and geopolitical issues meant the trend of market volatility remained. The period was effectively bookended by market disruption associated with US trade and foreign policy, initially following the announcement of US 'Liberation Day' tariffs in April 2025 and then, towards the year end, by the escalation of the US and Israel conflict with Iran in March 2026. Between these two episodes, market sentiment improved as inflation generally eased and expectations for further interest rate cuts increased, supporting both bond and equity markets.

6.11 For much of the year, the backdrop for government bonds became more constructive than had been the case in recent years. In the UK in particular, falling inflation and growing expectations of further Bank of England rate cuts supported sentiment, although yields remained volatile as investors also had to contend with fiscal concerns and an uncertain economic outlook. As a result, income returns remained attractive, while capital values were more variable. By the final quarter, however, the rise in oil and other commodity prices caused by the conflict with Iran raised concerns that inflation could move higher again and that further monetary easing could be delayed or even reversed, leading to renewed pressure on bond markets.

6.12 Equity markets also recovered well from the tariff-related weakness seen early in the financial year, supported by improving sentiment around inflation and interest rates, resilient corporate earnings and continued enthusiasm for artificial intelligence-related investment. AI remained a dominant theme in global equity markets throughout the year, although there was also concern that valuations in parts of the market had become too stretched and that an AI-driven bubble could unwind. Despite these concerns, equity markets generally made gains through much of the period before the deterioration in sentiment at the year-end as geopolitical risks intensified. For strategic pooled investments, this meant capital values were supported for much of the year, while income distributions continued to provide an important component of total return.

6.13 UK commercial property experienced a more stable backdrop than in the most difficult period following the sharp rise in yields in 2022 and 2023. Lower interest rate expectations and a firmer tone in markets for much of the year helped support valuations, although capital values were broadly flat overall. Income remained the main driver of returns, with rental income providing a relatively resilient contribution. However, as with other asset classes, the environment became more uncertain towards the end of the period.

## 7 Non-Treasury Investments

7.1 The definition of investments in the Treasury Management Code covers all the financial assets of the Council as well as other non-financial assets which the Council holds primarily for financial return. Investments that do not meet the definition of treasury management investments (i.e. management of surplus cash) are categorised as either for service purposes (made explicitly to further service objectives) and or for commercial purposes (made primarily for financial return).

7.2 Investment Guidance issued by the Ministry of Housing, Communities & Local Government (MHCLG) also includes within the definition of investments all such assets held partially or wholly for financial return.

7.3 The Council holds the following non-treasury investments as at the 31 March 2026:

**Table 8 Non-Financial Investments**

| Non-Financial Investments | 2024/25 £m | 2025/26 £m |
|---|---|---|
| Manchester Airport Equity | £5.610 | £5.610 |
| Manchester Airport Loan | £29.366 | £29.366 |
| Manchester Airport Loan Interest | £8.262 | £7.127 |
| Bury MBC Townside Fields Loan | £7.257 | £7.257 |
| Six Town Housing Loan | £2.797 | £2.621 |
| Bury Bruntwood (Millgate) LLP Loan | £20.349 | £20.349 |

| | | |
|---|---|---|
| The Prestwich Regeneration (LLP) Loan | £1.127 | £1.127 |
| Debt Managed for Probation Services | £0.011 | £0.011 |
| Other loan Accounts | £0.060 | £0.057 |
| Capital Debtors | £3.507 | £3.507 |
| **Total** | **£78.346** | **£77.032** |

## 8 Treasury Performance for 2025/26

8.1 The Council measures the financial performance of its treasury management activities both in terms of its impact on the revenue budget and its relationship to benchmark interest rates.

MRP Regulations

8.2 On 10 April 2024 amended legislation and revised statutory guidance were published on Minimum Revenue Provision (MRP). The majority of the changes first took effect from the 2025/26 financial year, although there is a requirement that for capital loans given on or after 7th May 2024 sufficient MRP must be charged so that the outstanding CFR in respect of the loan is no higher than the principal outstanding less the Expected Credit Loss (ECL) charge for that loan.

8.3 The regulations also require that local authorities cannot exclude any amount of their CFR from their MRP calculation unless by an exception set out in law. Capital receipts cannot be used to directly replace, in whole or part, the prudent charge to revenue for MRP (there are specific exceptions for capital loans and leased assets).

Compliance

8.4 All treasury management activities undertaken during the year complied fully with the principles in the Treasury Management Code and the Council's approved Treasury Management Strategy Compliance with specific investment limits is displayed in table 9 below.

**Table 9 Investment Limits**

| Investment Limits | 31-Mar-2026 Actual £m | 2025-26 Limit £m | Complied? Yes/No |
|---|---|---|---|
| UK Government | £10.380 | Unlimited | Yes |
| UK Local Authorities & Other Government Entities – except Local Authorities subject to a Section 114 notice | £0.000 | £20.000 | Yes |
| UK Banks (Unsecured) | £4.238 | £25.000 | Yes |

| | | | |
|---|---|---|---|
| UK Building Societies (Unsecured) | £0.000 | £20.000 | Yes |
| Registered Providers (Unsecured) | £0.000 | £20.000 | Yes |
| **Total** | **£14.618** | | |

8.5 Compliance with the Authorised Limit and Operational Boundary for external debt is demonstrated in table 10 below.

**Table 10 Debt and the Authorised Limit and Operational Boundary**

| Debt and the Authorised Limit and Operational Boundary | Maximum Borrowing during 2025/26 £m | 31-Mar-2026 Actual Borrowing £m | 2025/26 Operational Boundary £m | 2025/26 Authorised Limit £m | Complied? Yes/No |
|---|---|---|---|---|---|
| Borrowing | £403.820 | £369.802 | £464.113 | £475.113 | Yes |

8.6 The operational boundary is the expected borrowing position of the Council during the year. Periods where the actual position is either below or over the boundary are acceptable subject to the authorised limit not being breached. Since the operational boundary is a management tool for in-year monitoring it is not significant if the operational boundary is breached on occasions due to variations in cash flow, and this is not counted as a compliance failure. The authorised limit is the “affordable borrowing limit” required by section 3 of the Local Government Act 2003. Once this has been set, the Council does not have the power to borrow above this level. Table 10 above demonstrates that during 2025/26 the Council has maintained gross borrowing within its authorised limit.

**Table 11 - Ratio of Financing Costs to Net Revenue Stream**

| Financing costs as a proportion of net revenue stream | 2024-25 Actual % | 2025/26 Budget (Feb 25) % | 2025/26 Revised Budget (Feb 26) % | 2025-26 Actual % |
|---|---|---|---|---|
| Non - HRA | 1.08% | 3.58% | 3.97% | 2.41% |
| HRA | 11.22% | 13.66% | 9.06% | 9.99% |

8.7 This indicator identifies the trend in the cost of capital, (borrowing and other long term obligation costs net of investment income), against the net revenue stream.

**Treasury Management Prudential Indicators**

8.8 As required by the 2021 CIPFA Treasury Management Code, the Council monitors and measures the following treasury management prudential indicators.

Liability Benchmark

8.9 This indicator compares the Council's actual existing borrowing against a liability benchmark that has been calculated to show the lowest risk level of borrowing. The liability benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future and so shape its strategic focus and decision making. It represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments at the minimum level required to manage day-to-day cash flow.

**Table 12 - Liability Benchmark**

| | 31-Mar-2025 Actual £m | 31-Mar-2026 Actual £m | 31-Mar-2027 Forecast £m | 31-Mar-2028 Forecast £m |
|---|---|---|---|---|
| Loans CFR | £426.300 | £437.200 | £472.500 | £481.100 |
| Less: Balance sheet resources | (£96.600) | (£86.100) | (£86.100) | (£86.100) |
| **Net loans requirement** | **£329.700** | **£351.100** | **£386.400** | **£395.000** |
| Plus: Liquidity allowance | £20.000 | £10.000 | £10.000 | £10.000 |
| **Liability benchmark** | **£349.700** | **£361.100** | **£396.400** | **£405.000** |
| **Existing borrowing** | **£295.266** | **£365.671** | **£371.369** | **£379.114** |

8.10 Compared with the Liability Benchmark included in the 2025/26 Treasury Strategy, the updated position as at 31 March 2026 shows an increasing borrowing need across the planning period (albeit phased differently to the original forecast for 31/03/26 and 31/03/27 which was £466m and £462m respectively). This increasing Loans CFR requirement reflects a continued reliance on borrowing to help fund capital expenditure,

8.11 Chart 1 below shows that the Liability Benchmark is forecast to decline steadily from £361.100m in 2026 to nil by 2068, reflecting the repayment of existing debt. The benchmark remains below the Capital Financing Requirement (CFR) throughout the period, demonstrating that borrowing is being managed within the Council's long-term financing needs.

**Chart 1 Liability Benchmark**

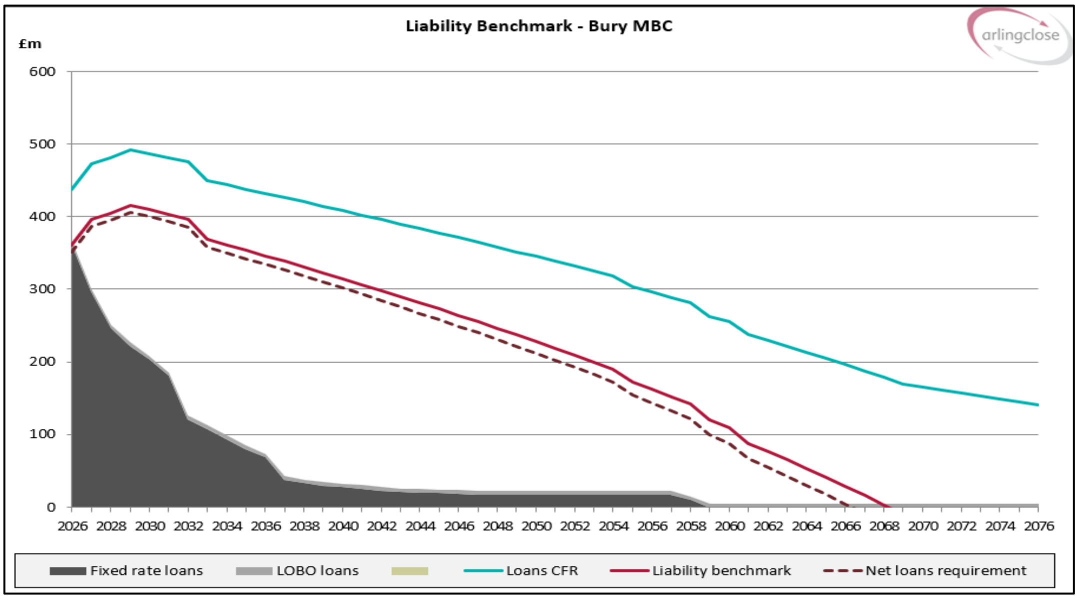


**Chart Key:**

**Fixed rate loans** - The grey shaded area represents the Council's existing loans and shows their current maturity profile.

**Loans CFR** - The blue line is calculated in accordance with the loans CFR definition in the Prudential Code and represents the Council's underlying need to borrow for capital spending that has not yet been financed by other means.

**Net Loans Requirement** - The dotted red line is based upon the CFR but factors in other balance sheet resources, such as cash-backed reserves and working capital. These balances improve the Council's cash position and enable it to maintain an under-borrowed position by not externally borrowing up to the full CFR, thus saving on interest costs. Should these resources decrease (for example if reserves are used up) then this line will be raised closer to the loans CFR suggesting that more borrowing is needed.

**Liability Benchmark** - The solid red line is the Council's net loans requirement plus short-term liquidity allowance (a notional buffer of £10m) for cashflow purposes. This is the level of borrowing the Council will need in order to maintain this desired cash position.

8.12 Interest Rate Exposures: This indicator is set to control the Council's exposure to interest rate risk. Bank Rate remained unchanged at 4.50% throughout 2025/26, having been reduced from 5.25% to 4.50% during 2024/25. Despite the stable Bank Rate, PWLB borrowing rates increased across most maturities during the year, reflecting movements in gilt yields and market expectations for inflation and longer-term interest rates.

**Table 13 - Interest Rate Risk Indicator**

| Interest rate risk indicator | 2025/26 Target £m | 31-Mar-2026 Actual £m | Complied? |
|---|---|---|---|
| Upper limit on one-year revenue impact of a 1% rise in interest rates | £0.21 | £0.16 | Yes |
| Upper limit on one-year revenue impact of a 1% fall in interest rates | (£0.21) | (£0.16) | Yes |

8.13 The impact of a change in interest rates is calculated on the assumption that maturing loans and investment will be replaced at new market rates.

8.14 For context, the changes in interest rates during the year are detailed below:

**Table 14- Changes in interest rates during the year**

| Rate Description | 31-Mar-25 | 31-Mar-26 | Change |
|---|---|---|---|
| Bank Rate | 4.50% | 3.75% | (0.75%) |
| 1-year PWLB certainty rate, maturity loans | 5.02% | 5.24% | 0.22% |
| 5-year PWLB certainty rate, maturity loans | 5.17% | 5.48% | 0.31% |
| 10-year PWLB certainty rate, maturity loans | 5.62% | 5.92% | 0.30% |
| 20-year PWLB certainty rate, maturity loans | 6.11% | 6.43% | 0.32% |
| 50-year PWLB certainty rate, maturity loans | 5.87% | 6.28% | 0.41% |

**Report Author(s) and Contact Details:**

*Name: Neil Kissock*
*Position: Director of Finance*
*Department: Corporate Core Services*
*E-mail: N.Kissock@bury.gov.uk*

**Links with the Corporate Priorities:**

Treasury Management forms a key part of the council's overall governance and financial administration and control framework, which underpin the council's three clear corporate priorities as set out in the Let's Do It Strategy that will deliver financial sustainability for the Council.

**Equality Impact and Considerations:**

n/a

**Environmental Impact and Considerations:**

n/a

**Assessment and Mitigation of Risk:**

| Risk / opportunity | Mitigation |
|---|---|
| There are considerable risks to the security of the Council's resources if appropriate treasury management strategies and policies are not adopted and followed. | Regular monitoring and reporting ensure that any changes in the financial position are quickly identified, and action can be taken to manage the overall position. |

**Legal Implications:**

Treasury management is a matter reserved for Council, requiring Council approval. The Local Government Act 2003 mandates an annual review of treasury management activities. This report aligns to the CIPFA Treasury management codes. This report updates Cabinet in line with the Council's financial regulations and constitution.

**Financial Implications:**

The financial implications are set out in the report and confirm the treasury management activities have been carried out in accordance with approved limits.

**Appendices:**

None

**Background papers:**

- Capital Strategy and Capital Programme 2025/26 – 2027/28
- Treasury Management Outturn Report 2024/25
- Treasury Management Strategy and Prudential Indicators 2025/26

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

| Term | Meaning |
|---|---|
| Authorised Limit | The maximum amount of debt that a local authority may legally hold, set annually in advance by the authority itself. One of the Prudential Indicators. |
| Bank | Regulated firm that provides financial services to customers. But see also Bank of England. |
| Bank of England | The central bank of the UK, based in London, sometimes just called "the Bank". See also Monetary Policy Committee and PRA. |

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|---|---|
| Bank Rate | The official interest rate set by the Monetary Policy Committee, and the rate of interest paid by the Bank of England on commercial bank deposits. Colloquially termed the “base rate”. |
| Borrowing | Usually refers to the stock of outstanding loans owed and bonds issued. |
| Call account | A deposit account that can be called back, normally on instant access. |
| Capital expenditure | Expenditure on the acquisition, creation or enhancement of fixed assets that are expected to provide value for longer than one year, such as property and equipment, plus expenditure defined as capital in legislation such as the purchase of certain investments. |
| Capital finance | Arranging and managing the cash required to finance capital expenditure, and the associated accounting. |
| Capital finance regulations | Legislation covering local authorities’ activities in capital finance, treasury management and accounting. Separate regulations are published for the four nations of the UK. |
| Capital financing requirement (CFR) | A local authority’s underlying need to hold debt for capital purposes, representing the cumulative capital expenditure that has been incurred but not yet financed. The CFR increases with capital expenditure and decreases with capital finance and MRP. |
| Capital receipt | Cash obtained from the sale of an item whose purchase would be capital expenditure. The law only allows local authorities to spend capital receipts on certain items, such as new capital expenditure. They are therefore held in a capital receipts reserve until spent. |
| Capital strategy | An annual report required by the Prudential Code that sets out a local authorities’ high-level plans for capital expenditure, debt and investments and its Prudential Indicators for the forthcoming financial year. |
| Certainty rate | Discount on PWLB rates for new loans borrowed, available to all local authorities that provide a forecast for their borrowing requirements. |
| Counterparty | The other party to a loan, investment or other contract. |
| Counterparty limit | The maximum amount an investor is willing to lend to a counterparty, in order to manage credit risk. |
| CPI | Consumer Price Index - the measure of inflation targeted by the Monetary Policy Committee, measured on a harmonised basis across the European Union. See also RPI. |

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| Credit risk | The risk that a counterparty will default on its financial obligations. |
| Debt | (1) A contract where one party owes money to another party, such as a loan, deposit or bond. Contrast with equity. (2) In the Prudential Code, the total outstanding borrowing plus other long term liabilities. |
| Default | Failure to meet an obligation under a debt contract, including the repayment of cash or compliance with a covenant, usually as a result of being in financial difficulty (rather than an administrative oversight). |
| Deposit | A regulated placing of cash with a financial institution. Deposits are not tradable on financial markets. |
| DMADF | Debt Management Account Deposit Facility – a facility offered by the DMO enabling local authorities to deposit cash at very low credit risk. Not available in Northern Ireland. |
| DMO | Debt Management Office – an executive agency of HM Treasury that deals with central government’s debt and investments. |
| EIP | Equal instalments of principal. A method of repaying a loan where the principal is repaid over the life of the loan, in equal instalments. Interest payments reduce over time as the principal is repaid. |
| Federal Reserve | The central bank of the USA, often just called “the Fed”. |
| Fiscal policy | Measures taken by government to boost or slow the economy via taxation and spending decisions. Fiscal loosening or easing refers to cuts in taxes or increases in spending, while fiscal tightening refers to the opposite. See also monetary policy. |
| Financial institution | A bank, building society or credit union. Sometimes the term also includes insurance companies. |
| Financial instrument | IFRS term for investments, borrowing and other cash payable and receivable. |
| Financing costs | In the Prudential Code, interest payable on debt less investment income plus premiums less discounts plus MRP. |
| GDP | Gross domestic product – the value of the national aggregate production of goods and services in the economy. Increasing GDP is known as economic growth. |
| General Fund | A local authority reserve that holds the accumulated surplus or deficit on revenue income and expenditure, except on council housing. See also Housing Revenue Account. |

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| Gilt | Bond issued by the UK Government, taking its name from the gilt-edged paper they were originally printed on. |
| Gilt yield | Yield on gilts. Commonly used as a measure of risk-free long-term interest rates in the UK. |
| IFRS | International Financial Reporting Standards, the set of accounting rules in use by UK local authorities since 2010. |
| Interest | Compensation for the use of cash paid by borrowers to lenders on debt instruments. |
| Internal borrowing | A local government term for when actual “external” debt is below the capital financing requirement, indicating that difference has been borrowed from internal resources instead; in reality this is not a form of borrowing. |
| Investment guidance | Statutory guidance issued by MHCLG and the devolved governments on local government investments. Local authorities are required by law to have regard to the relevant investment guidance. |
| Investment strategy | A document required by investment guidance that sets out a local authority’s investment plans and parameters for the coming year. Sometimes forms part of the authority’s treasury management strategy. |
| Liability benchmark | Term in CIPFA’s Risk Management Toolkit which refers to the minimum amount of borrowing required to keep investments at a minimum liquidity level. Used to compare against the actual and forecast level of borrowing. |
| Liquidity risk | The risk that cash will not be available to meet financial obligations, for example when investments cannot be recalled and new loans cannot be borrowed. |
| Loan | Contract where the lender provides a sum of money (the principal) to a borrower, who agrees to repay it in the future together with interest. Loans are not normally tradable on financial markets. There are specific definitions in government investment guidance. |
| Loans CFR | The capital financing requirement less the amount met by other long-term liabilities; i.e. the amount to be met by borrowing. |
| LOBO | Lender’s option borrower’s option – a long-term loan where the lender has the option to propose an increase in the interest rate on pre-determined dates. The borrower then has the option to either accept the new rate or repay the loan without penalty. LOBOs increase the borrower’s interest rate |

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| | risk and the loan should therefore attract a lower rate of interest initially. |
| Long-term | Usually means longer than one year. |
| Maturity | (1) The date when an investment or borrowing is scheduled to be repaid. (2) A type of loan where the principal is only repaid on the maturity date. |
| Maturity profile | A table or graph showing the amount (or percentage) of debt or investments maturing over a time period. |
| MHCLG | Ministry of Housing, Communities and Local Government – the central government department that oversees local authorities in England. |
| Monetary policy | Measures taken by central banks to boost or slow the economy, usually via changes in interest rates. Monetary easing refers to cuts in interest rates, making it cheaper for households and businesses to borrow and hence spend more, boosting the economy, while monetary tightening refers to the opposite. See also fiscal policy and quantitative easing. |
| Monetary Policy Committee (MPC) | Committee of the Bank of England responsible for implementing monetary policy in the UK by changing Bank Rate and quantitative easing with the aim of keeping CPI inflation at around 2%. |
| MRP | Minimum revenue provision - an annual amount that local authorities are required to set aside and charge to revenue for the repayment of debt associated with capital expenditure. Local authorities are required by law to have regard to government guidance on MRP. |
| Net borrowing | Borrowing minus treasury investments. |
| Net revenue stream | In the Prudential Code, income from general government grants, Council Tax and rates. |
| Notice account | A deposit account where the cash can be called back after a given notice period. |
| Non-specified investments | Government term for investments not meeting the definition of a specified investment or a loan upon which limits must be set. Since 2018, the term does not apply to treasury investments in England. |
| Other long-term liabilities | Prudential Code term for credit arrangements. |
| Operational boundary | A prudential indicator showing the most likely, prudent, estimated level of external debt, but not the worst-case scenario. Regular breaches of the operational boundary should prompt management action. |
| Present value | The value today of a series of future cash flows, calculated using a discount rate. |
| Principal | The amount of money originally lent on a debt instrument. |

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| Professional client | MiFID II term for a client of a regulated firm that has a higher level of experience in financial markets than a retail client and therefore needs a lower level of protection. Local authorities may “opt up” to be treated as professional clients if they meet certain requirements. |
| Prudential borrowing | Another term for unsupported borrowing. |
| Prudential Code | Developed by CIPFA and introduced in April 2004 as a professional code of practice to support local authority capital investment planning within a clear, affordable, prudent and sustainable framework and in accordance with good professional practice. Local authorities are required by law to have regard to the Prudential Code. |
| Prudential indicators | Indicators required by the Prudential Code and determined by the local authority to define its capital expenditure and asset management framework. They are designed to support and record local decision making in a manner that is publicly accountable. |
| PWLB | Public Works Loans Board - a statutory body operating within the DMO that lends money from the National Loans Fund to local authorities and other prescribed bodies and collects the repayments. Not available in Northern Ireland. |
| Retail client | MiFID II term for a client of a regulated firm that has the lowest level of experience in financial markets and therefore needs the highest level of protection. Local authorities are initially classed as retail clients but may “opt up” to be treated as professional clients. |
| Revenue expenditure | Expenditure to meet the ongoing cost of delivering public services including salaries and the purchase of goods and services, as opposed to capital expenditure. |
| RPI | Retail prices index - an older measure of inflation that tracks the prices of goods and services including mortgage interest and rent. Index-linked gilts are uprated using RPI. See also CPI. |
| Sector limit | The maximum amount an investor is willing to lend to all counterparties in a particular industry sector, in order to manage credit risk. |
| Short-term | Usually means less than one year. |
| Specified investments | Term used in government investment guidance for investments that are denominated in sterling, mature in less than a year, are not defined as capital expenditure, and are made with the UK government, another UK local authority or a high credit quality body, as defined by the local authority. Since 2018, |

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| | the term does not apply to treasury investments in England. Not applicable in Scotland. In Wales, loans to local authorities are specified investments even if they do not fully meet the criteria. |
| State aid | Financial assistance provided by the public sector to the private sector, such as grants and soft loans, which has the potential to distort competition and is therefore often, but not always, illegal. |
| Supported borrowing | Borrowing for which the repayment costs are supported by government grant. |
| Temporary borrowing | Borrowing with a term of less than one year. |
| Term deposit | A deposit that is repayable after a fixed period of time. |
| Treasury investments | Investments made for treasury management purposes, as opposed to commercial investments and service investments. |
| Treasury management | The management of an organisation's cash flows, investment and borrowing, with a particular focus on the identification, control and management of risk. Specifically excludes the management of pension fund investments. |
| Treasury management advisor | Regulated firm providing advice on treasury management, capital finance and related issues. |
| Treasury Management Code (TM Code) | CIPFA's Code of Practice for Treasury Management in the Public Services and Cross-Sectoral Guidance Notes, to which local authorities are required by law to have regard. |
| Treasury management indicators | Indicators required by the Treasury Management Code to assist in the management of credit risk, interest rate risk, refinancing risk and price risk. |
| Treasury management policy statement | Document required by the Treasury Management Code setting out a local authority's definition of and objectives for treasury management. |
| Treasury management practices (TMPs) | Document required by the Treasury Management Code setting out a local authority's detailed processes and procedures for treasury management. |
| Treasury management strategy | Annual report required by the Treasury Management Code covering the local authority's treasury management plans for the forthcoming year. |
| Unsupported borrowing | Borrowing where the cost is self-financed by the local authority. Sometimes called prudential borrowing since it was not permitted until the introduction of the Prudential Code in 2004. See also supported borrowing. |
| Working capital | The cash surplus or deficit arising from the timing differences between income/expenditure in accounting terms and receipts/payments in cash terms. |

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| Yield | A measure of the return on an investment, especially a bond. The yield on a fixed rate bond moves inversely with its price. |
| Yield curve | A chart of yields or interest rates for similar instruments over a range of maturity dates. See also inverted yield curve and normal yield curve. |

**MINUTES OF THE MEETING OF THE GREATER MANCHESTER COMBINED AUTHORITY HELD ON FRIDAY 26TH JUNE 2026 AT GUARDSMAN TONY DOWNES HOUSE, DROYLSDEN**

**PRESENT**

| | |
|---|---|
| GMCA Deputy Mayor | City Mayor Paul Dennett (In the Chair) |
| GM Deputy Mayor | Kate Green |
| Bolton | Councillor Akhtar Zaman |
| Oldham | Councillor Arooj Shah |
| Rochdale | Councillor Neil Emmott |
| Stockport | Councillor Mark Roberts |
| Tameside | Councillor Eleanor Wills |
| Trafford | Councillor Tom Ross |
| Wigan | Councillor Nazia Rehman |

**ALSO IN ATTENDANCE:**

| | |
|---|---|
| Bury | Councillor Sean Thorpe |
| Wigan | Councillor Mary Callaghan |
| GM Integrated Care Board | Majid Hussain |
| GM Race Equality Panel | Kofo Kego Oyeleye |
| GM Civic Leadership Programme | Diane Edwards |

**OFFICERS IN ATTENDANCE:**

| | |
|---|---|
| Group Chief Executive Officer | Caroline Simpson |
| Group Deputy Chief Executive | Andrew Lightfoot |
| Group Monitoring Officer | Gillian Duckworth |
| GMCA Secretary | Sarah Horsman |
| Bolton | Sue Johnston |
| Bury | Lynne Ridsdale |
| Manchester | Tom Stannard |
| Oldham | Shelley Kipling |

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|---|---|
| Rochdale | Julie Murphy |
| Salford | Stephen Young |
| Stockport | Michael Cullen |
| Tameside | Emma Alexander |
| Trafford | Sarah Saleh |
| Wigan | James Winterbottom |
| GMCA | Sylvia Welsh |
| GMCA | Lee Teasdale |
| GMCA | Karen Chambers |

**GMCA 53/26 APOLOGIES**

That apologies be received and noted from Councillor Eamonn O'Brien (Bury), Councillor Bev Craig (Manchester), Sara Todd (Trafford) & Alison McKenzie-Folan (Wigan).

*Note: In the absence of a Mayor, Deputy Mayor of the GMCA, City Mayor Paul Dennett took the Chair for the meeting.*

**GMCA 54/26 APPOINTMENT OF CHAIR 2026/27**

**RESOLVED /-**

That it be noted that The Mayor of Greater Manchester, under Part 5A, section 4 of the Constitution, is the Chair of the GMCA (ex-officio).

**GMCA 55/26 APPOINTMENT OF VICE-CHAIRS 2026/27**

**RESOLVED /-**

1. That it be noted that City Mayor, Paul Dennett, Deputy Mayor, is automatically appointed as a Vice Chair of the GMCA, under Part 5A, section 4, of the Constitution.

2. That it be noted that Councillor Mark Roberts is automatically appointed as a Vice Chair of the GMCA, under Part 5A, section 4, of the Constitution.

**GMCA 56/26 GMCA CONSTITUTION**

**RESOLVED /-**

1. That the creation of an Investment Sub-Committee as outlined in the report be approved.
2. That the revised constitution accompanying the report be adopted as the constitution of the GMCA.

**GMCA 57/26 APPOINTMENTS TO GREATER MANCHESTER BODIES**

**RESOLVED /-**

**Appointments to Greater Manchester Bodies**

1. That the appointments by Greater Manchester Local Authorities of members and substitute members to the Greater Manchester Combined Authority for 2026/27 be noted as follows:

| **Local Authority** | **Member** | **Substitute Member** |
|---|---|---|
| **GMCA** | Andy Burnham | - |
| **Bolton** | Akhtar Zaman (Lab) | Jackie Schofield (Lab) |
| **Bury** | Eamonn O’Brien (Lab) | Lucy Smith (Lab) |
| **Manchester** | Bev Craig (Lab) | Garry Bridges (Lab) |
| **Oldham** | TBC | TBC |
| **Rochdale** | Neil Emmott (Lab) | Tricia Ayrton (Lab) |
| **Salford** | Paul Dennett (Lab) | Tracy Kelly (Lab) |

| | | |
|---|---|---|
| **Stockport** | Mark Roberts (Lib Dem) | Jilly Julian (Lib Dem) |
| **Tameside** | Eleanor Wills (Lab) | Andrew McLaren (Lab) |
| **Trafford** | Tom Ross (Lab) | Liz Patel (Lab) |
| **Wigan** | Nazia Rehman (Lab) | Keith Cunliffe (Lab) |

2. That the appointment of Sarah Horseman, Director of Governance, Risk & Assurance, as the Secretary of the GMCA be approved.

3. That the appointment of the following members to the GMCA Standards Committee for 2026/27 be approved:

| | **Member** | **Local Authority** |
|---|---|---|
| 1. | Tom Ross | Trafford (Lab) |
| 2. | Eleanor Wills | Tameside (Lab) |
| 3. | Akhtar Zaman | Bolton (Lab) |
| 4. | Nazia Rehman | Wigan (Lab) |
| 5. | Mark Roberts | Stockport (Lib Dem) |

4. That the appointment of the following members to the GMCA Resources Committee for 2026/27 be approved:

| | **Member** | **Local Authority** |
|---|---|---|
| 1. | Nazia Rehman | Wigan (Lab) |
| 2. | Paul Dennett | Salford (Lab) |

| | | |
|---|---|---|
| 3. | Tom Ross | Trafford (Lab) |
| 4. | Eleanor Wills | Tameside (Lab) |
| 5. | Eamonn O'Brien | Bury (Lab) |
| 6. | Bev Craig | Manchester (Lab) |
| 7. | Mark Roberts | Stockport (Lib Dem) |

5. That the appointment of the following members to the GMCA Investment Sub-Committee for 2026/27 be approved:

| | **Member** | **Local Authority** |
|---|---|---|
| 1. | Eleanor Wills | Tameside (Lab) |
| 2. | Nazia Rehman | Wigan (Lab) |
| 3. | Bev Craig | Manchester (Lab) |
| 4. | Paul Dennett | Salford (Lab) |
| 5. | Mark Roberts | Stockport (Lib Dem) |

6. That the appointment of the following members and substitute members to the GMCA Audit Committee for 2026/27 be approved:

| | **Member** | **Local Authority** |
|---|---|---|
| 1. | Emily Mort | Bolton (Lab) |
| 2. | Jodie Hook | Bury (Lab) |
| 3. | Olly Baskerville | Trafford (Lab) |
| 4. | Paul Robinson | Oldham (Reform) |

| | Local Authority | Substitute Member |
|---|---|---|
| 1. | David Godfrey | Manchester (Lab) |
| 2. | Lee McStein | Wigan (Lab) |

7. That 14 members and 14 substitute members be appointed to the GMCA Waste & Recycling Committee for 2026/27 as follows:

| Local Authority | Member | Substitute |
|---|---|---|
| **Bolton** | Robert Morrisey (Lab) | Nadeem Ayub (Lab) |
| | Garry Veevers (Lib Dem) | |
| **Bury** | Alan Quinn (Lab) | Jodie Hook (Lab) |
| | Paul Davies (Reform) | |
| **Manchester** | Tim Whiston (Lab) | Basat Sheikh (Lab) |
| | | Steve Hodgkiss (Reform) |
| **Oldham** | Vacancy | Vacancy |
| | Peter Hanlon (Reform) | |
| **Rochdale** | Aiza Rashid (Lab) | Terry Smith (Lab) |
| | Anthony Gilbert (Reform) | |
| | Stephen Anstee (Con) | |
| **Salford** | Barbara Bentham (Lab) | Wilson Nkurunziza (Lab) |
| | | Chris Bates (Reform) |

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|---|---|---|
| **Stockport** | Jake Austin (Lib Dem) | Grace Baynham (Lib Dem) |
| | | Shaun Regan (Reform) |
| **Tameside** | Laura Boyle (Lab) | Andrew McLaren (Lab) |
| **Trafford** | Stephen Adshead (Lab) | Sue Maitland (Lab) |
| | Daniel Jerome (Green) | Jane Leicester (Green) |
| | | Jane Brophy (Lib Dem) |
| | | Dylan Butt (Con) |
| **Wigan** | N/A | N/A |

8. That the appointment of the Mayor of Greater Manchester to the Bee Network Committee for 2026/27 be noted.

9. That Tom Ross (Lab) (Trafford) be appointed, to act as the substitute member for the Mayor of Greater Manchester, to the Bee Network Committee for 2026/27.

10. That Nazia Rehman (Lab) (Wigan) be appointed to act as the GMCA member on the Bee Network Committee member for 2026/27, and that Neil Emmott (Lab) (Rochdale) be appointed to act as GMCA substitute member on the Bee Network Committee for 2026/27.

11. That the Bee Network Committee be requested to appoint five members from the Committee to the Greater Manchester Accessible Transport Ltd (GMATL) Board for 2026/27.

12. That the appointments to the Bee Network Committee by the 10 GM Local Authorities for 2026/27, be noted, as follows:

| **Local Authority** | **Member** | **Substitute** |
|---|---|---|
| **Bolton** | Nadeem Ayub (Lab) | Sean Fielding (Lab) |

| | | |
|---|---|---|
| **Bury** | Lucy Smith (Lab) | Gareth Staples-Jones (Lab) |
| **Manchester** | Mandie Shilton-Godwin (Lab) | Anthony McCaul (Lab) |
| **Oldham** | Vacancy | Vacancy |
| **Rochdale** | Terry Smith (Lab) | Shah Wazir (Lab) |
| **Salford** | Paul Dennett (Lab) | Mike McCusker (Lab) |
| **Stockport** | Grace Baynham (Lib Dem) | Michaela Meikle (Lib Dem) |
| **Tameside** | Stephen Homer (Lab) | Jacqueline Owen (Lab) |
| **Trafford** | Barry Winstanley (Lab) | Stephen Adshead (Lab) |
| **Wigan** | Paul Kenny (Lab) | Dane Anderton (Lab) |

13. That it be noted that the Mayor will appoint up to 4 additional members to the GMCA Bee Network Committee reflecting as far as reasonably practicable the balance of political parties.

14. That 19 members and 19 substitute members be appointed to the GMCA Overview & Scrutiny Committee for 2026/27 as follows:

| **Local Authority** | **Member (x20)** | **Substitute Pool (x20)** |
|---|---|---|
| Bolton | Peter Wright (Horwich & Blackrod First) | Emily Mort (Lab) |
| | Nadim Muslim (Con) | |

| | | |
|---|---|---|
| | Susan Howarth (Reform) | |
| Bury | Imran Rizvi (Lab) | Martin Hayes (Lab) |
| Manchester | Basil Curley (Lab) | Linda Foley (Lab) |
| | Sian Astley (Reform) | Jawad Amin (Lab) |
| | John Leech (Lib Dem) | Alan Good (Lib Dem) |
| | | Astrid Johnson (Green) |
| Oldham | Vacancy | Vacancy |
| | | Max Woodvine (Con) |
| | | Paul Taylor (Reform) |
| Rochdale | Kathryn Bromfield (Lab) | Patricia Dale (Lab) |
| | Tom Besford (Lab) | |
| | Mark Stephens (Reform) | Matthew Pilkington (Reform) |
| Salford | Maria Brabiner (Lab) | Tony Davies (Lab) |
| | | Miles Henderson (Reform) |
| | | Bob Clarke (Con) |
| Stockport | | Frankie Singleton (Lib Dem) |
| Tameside | Sangita Patel (Lab) | Christine Beardmore (Lab) |
| | Allan Hopwood (Reform) | Kim Roberts (Reform) |
| Trafford | Jill Axford (Lab) | Will Jones (Lab) |
| | Shaun Ennis (Lib Dem) | Ged Carter (Lab) |
| | Geraldine Coggins (Green) | |

| | | |
|---|---|---|
| | Nathan Evans (Con) | |
| Wigan | Christine Roberts (Lab) | Jenny Gregory (Lab) |
| | James Talbot (Lab) | |

15. That the Portfolio Lead for Culture be appointed to the GM Culture & Social Impact Fund Committee for 2026/27.

16. That the appointments made by the GM Local Authorities to the GM Culture & Social Impact Fund Committee for 2026/27 be approved as follows:

| **Local Authority** | **Member** | **Substitute Member** |
|---|---|---|
| **GMCA Portfolio Lead** | Neil Emmott (Lab) | |
| **Bolton** | Debbie Newall (Lab) | Karen Hon (Lab) |
| **Bury** | Gavin McGill (Lab) | Michael Rubinstein (Lab) |
| **Manchester** | Tina Kirwin-McGinley (Lab) | Leslie Bell (Lab) |
| **Oldham** | Vacancy | Vacancy |
| **Rochdale** | Susan Smith (Lab) | Georgina Jacques (Lab) |
| **Salford** | Hannah Robinson-Smith (Lab) | Jane Hamilton (Lab) |
| **Stockport** | Dan Oliver (Lib Dem) | Jilly Julian (Lib Dem) |
| **Tameside** | Leanne Feeley (Lab) | Hugh Roderick (Lab) |
| **Trafford** | Eve Parker (Lab) | Rose Thompson (Lab) |
| **Wigan** | Keith Cunliffe (Lab) | Paul Kenny (Lab) |

17. That the Portfolio Lead for Green City Region be appointed to the Green City Region Board for 2026/27.

18. That the appointments to the Green City Region Board as nominated by the 10 GM Local Authorities for 2026/27 be approved as follows:

| **Local Authority** | **Member** |
|---|---|
| **GMCA Portfolio Lead** | Tom Ross (Lab) |
| **Bolton** | Robert Morrisey (Lab) |
| **Bury** | Gareth Staples-Jones (Lab) |
| **Manchester** | Mandie Shilton-Godwin (Lab) |
| **Oldham** | Vacancy |
| **Rochdale** | Tricia Ayrton (Lab) |
| **Salford** | Mike McCusker (Lab) |
| **Stockport** | Jake Austin (Lib Dem) |
| **Tameside** | Laura Boyle (Lab) |
| **Trafford** | Barry Winstanley (Lab) |
| **Wigan** | Paul Kenny (Lab) |

19. That the GMCA Green-City Region Portfolio Leader be appointed to the Greater Manchester Green City Region Partnership Board for 2026/27.

20. That the Portfolio Lead for Children & Young People be appointed to the GMCA Children's Board for 2026/27.

21. That the appointments to the GMCA Children's Board as nominated by the 10 GM Local Authorities for 2026/27 be approved as follows:

| Local Authority | Member |
|---|---|
| **GMCA Portfolio Lead** | Mark Roberts (Lib Dem) |
| **Bolton** | Rabiya Jiva (Lab) |
| **Bury** | Lucy Smith (Lab) |
| **Manchester** | Julie Reid (Lab) |
| **Oldham** | Vacancy |
| **Rochdale** | Rachel Massey (Lab) |
| **Salford** | Jim Cammell (Lab) |
| **Stockport** | Colin MacAlister (Lib Dem) |
| **Tameside** | Teresa Smith (Lab) |
| **Trafford** | George Devlin (Lab) |
| **Wigan** | Laura Flynn (Lab) |

22. That the Portfolio Leader for Clean Air be appointed to the Air Quality Administration Committee for 2026/27.

23. That the appointments from the GM Local Authorities to the Air Quality Administration Committee for 2026/27 be noted as follows:

| Local Authority | Member | Substitute |
|---|---|---|
| **GMCA Portfolio Lead** | Eamonn O'Brien (Lab) | |
| **Bolton** | Robert Morrisey (Lab) | Vacancy |
| **Bury** | Lucy Smith (Lab) | Gary Staples-Jones (Lab) |

| | | |
|---|---|---|
| **Manchester** | Mandie Shilton-Godwin (Lab) | Anthony McCaul (Lab) |
| **Oldham** | Vacancy | Vacancy |
| **Rochdale** | Tricia Ayrton (Lab) | Vacancy |
| **Salford** | Mike McCusker (Lab) | Philip Cusack (Lab) |
| **Stockport** | Jake Austin (Lib Dem) | Grace Baynham (Lib Dem) |
| **Tameside** | Laura Boyle (Lab) | Jacqueline Owen (Lab) |
| **Trafford** | Barry Winstanley (Lab) | Stephen Adshead (Lab) |
| **Wigan** | Paul Kenny (Lab) | Vacancy |

24. That the appointments from the GM Local Authorities to the GM Clean Air Scrutiny Committee for 2026/27 be noted as follows:

| **Local Authority** | **Member** | **Substitute** |
|---|---|---|
| **Bolton** | Martin Donaghy (Lab) | Shafaqat Shaikh (Lab) |
| **Bury** | Noel Bayley (Lab) | Vacancy |
| **Manchester** | Angeliki Stogia (Lab) | Vacancy |
| **Oldham** | Vacancy | Vacancy |
| **Rochdale** | Tom Besford (Lab) | Vacancy |
| **Salford** | Rob Sharpe (Lab) | John Mullen (Lab) |
| **Stockport** | Frankie Singleton (Lib Dem) | Jeremy Meal (Lib Dem) |

| | | |
|---|---|---|
| **Tameside** | Christine Beardmore (Lab) | Vacancy |
| **Trafford** | Jill Axford (Lab) | David Jarman (Lab) |
| **Wigan** | Christine Roberts (Lab) | Charles Rigby (Lab) |

25. That the appointments from the GM Local Authorities to the Police Fire and Crime Panel for 2026/27 be noted as follows:

| **Local Authority** | **Member** | **Substitute** |
|---|---|---|
| **Bolton** | Hamid Khurram (Lab) | Shafaqat Shaikh (Lab) |
| **Bury** | Richard Gold (Lab) | Imran Rizvi (Lab) |
| **Manchester** | Vacancy | Basat Sheikh (Lab) |
| **Oldham** | Vacancy | Vacancy |
| **Rochdale** | Daalat Ali (Lab) | Peter Joinson (Lab) |
| **Salford** | Barbara Bentham (Lab) | Wilson Nkurunziza (Lab) |
| **Stockport** | Dan Oliver (Lib Dem) | Helen Foster-Grime (Lib Dem) |
| **Tameside** | Stephen Homer (Lab) | Jacqueline Owen (Lab) |
| **Trafford** | Keleigh Glenton (Lab) | Rose Thompson (Lab) |
| **Wigan** | Kevin Anderson (Lab) | Yvonne Klieve (Lab) |

26. That the appointments from the GM Local Authorities to the Police Fire and Crime Steering Group for 2026/27 as follows:

| **Local Authority** | **Member** |
|---|---|

| | |
|---|---|
| **Bolton** | Hamid Khurram (Lab) |
| **Bury** | Richard Gold (Lab) |
| **Manchester** | Vacancy |
| **Oldham** | Vacancy |
| **Rochdale** | Daalat Ali (Lab) |
| **Salford** | Barbara Bentham (Lab) |
| **Stockport** | Dan Oliver (Lib Dem) |
| **Tameside** | Stephen Homer (Lab) |
| **Trafford** | Keleigh Glenton (Lab) |
| **Wigan** | Kevin Anderson (Lab) |

27. That the Portfolio Holder for Healthy Lives be appointed to the GM Integrated Care Partnership Board.

28. That the appointments from GM Local Authorities to the GM Integrated Care Partnership Board for 2026/27 be noted as follows:

| **Local Authority** | **Member** | **Substitute** |
|---|---|---|
| **GMCA** | Portfolio Lead for Healthy Lives | |
| **Bolton** | Sean Fielding (Lab) | Jackie Schofield (Lab) |
| **Bury** | Tamoor Tariq (Lab) | Eamonn O'Brien (Lab) |
| **Manchester** | Bev Craig (Lab) | Thomas Robinson (Lab) |
| **Oldham** | Vacancy | Vacancy |
| **Rochdale** | Daalat Ali (Lab) | Vacancy |

| | | |
|---|---|---|
| **Salford** | Tracy Kelly (Lab) | Hannah Robinson-Smith (Lab) |
| **Stockport** | Keith Holloway (Lib Dem) | Helen Foster-Grime (Lib Dem) |
| **Tameside** | Eleanor Wills (Lab) | Mike Smith (Lab) |
| **Trafford** | Jane Slater (Lab) | Tom Ross (Lab) |
| **Wigan** | Keith Cunliffe (Lab) | Nazia Rehman (Lab) |

29. That the Mayor be appointed, and Paul Dennett (Lab) (Salford) be appointed as the substitute member to act as the GMCA's appointment to the Transport for the North Board and the Rail North Committee.

30. That the Mayor be appointed, and Paul Dennett (Lab) (Salford) be appointed as the substitute member to act as the GMCA's appointment to the Transport for the North General Purposes Committee.

31. That Stephen Adshead (Lab) (Trafford) be appointed, and Barry Taylor (Lab) (Wigan) be appointed as the substitute member to act as the GMCA's appointment to the Transport for the North Audit & Governance Committee.

32. That Paul Kenny (Lab) (Wigan) be appointed, and Olly Baskerville (Lab) (Trafford) be appointed as the substitute member to act as the GMCA's appointment to the Transport for the North Scrutiny Committee.

33. That Councillors Eleanor Wills (Lab) (Tameside), Akhtar Zaman (Lab) (Bolton), Nazia Rehman (Lab) (Wigan), Phil Cusack (Lab) (Salford) and Liz Patel (Lab) (Trafford) be appointed to the Growth Company Board for 2026/27.

**GMCA 58/26 SCHEDULE OF MEETINGS 2026/27**

**RESOLVED /-**

That the following schedule of meetings for 2026/27 be noted:

**2026**

25 September 2026

30 October 2026

27 November 2026

11 December 2026

**2027**

29 January 2027

12 February 2027

26 February 2027 (if required)

26 March 2027

25 June 2027

**GMCA 59/26 CHAIRS ANNOUNCEMENTS**

**RESOLVED /-**

There were none.

**GMCA 60/26 URGENT BUSINESS**

**RESOLVED /-**

There was none.

**GMCA 61/26 DECLARATIONS OF INTEREST**

**RESOLVED /-**

There were none.

**GMCA 62/26 MINUTES OF THE GMCA MEETING HELD ON 27 MARCH 2026**

**RESOLVED /-**

That the minutes of the meeting of the GMCA held on 27 March 2026 be approved as a correct record.

**GMCA 63/26 MINUTES OF THE GMCA RESOURCES COMMITTEE MEETING HELD ON 27 MARCH 2026**

**RESOLVED /-**

That the proceedings of the meeting of the GMCA Resources Committee held on 27 March 2026 be approved as a correct record.

**GMCA 64/26 MINUTES OF THE GMCA OVERVIEW & SCRUTINY COMMITTEE MEETING HELD ON 25 MARCH 2026**

**RESOLVED /-**

That the proceedings of the meeting of the GMCA Overview & Scrutiny Committee held on 25 March 2026 be noted.

**GMCA 65/26 MINUTES OF THE GMCA BEE NETWORK COMMITTEE MEETING HELD ON 26 MARCH 2026**

**RESOLVED /-**

That the proceedings of the meeting of the GMCA Bee Network Committee held on 26 March 2026 be noted.

**GMCA 66/26 DELEGATED DECISIONS TAKEN DURING MAY-JUNE 2026**

**RESOLVED /-**

1. That the following decisions taken under delegation in the absence of a GMCA meeting in May 2026:

| Decision date taken | Decision Maker | Decisions |
|---|---|---|
| 29/05/2026 | Paul Dennett (Mayoral Decision) | Appointments to Atom Valley Northern Gateway Board |
| 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% |
| 29/05/2026 | Group Chief Executive | Future shape of GM Adult Skills – GM Local Skills Improvement Plan |
| 29/05/2026 | Group Chief Executive & Chief Finance Officer | Greater Manchester Good Growth Fund – May 2026 Allocations |
| 01/06/2026 | Group Chief Finance Officer (Mayoral Decision) | Future shape of GM Adult Skills - funding and contract approvals for AY2026/27 |

**GMCA 67/26 GMCA OVERVIEW & SCRUTINY COMMITTEE TASK & FINISH REVIEW – WORKFORCE RETENTION**

Councillor Mary Callaghan, Chair of the Task and Finish Group, presented the final task and finish review, which had been endorsed by members of the GMCA Overview

& Scrutiny Committee into workforce retention and quality within early education and childcare.

The review emphasised that early education and childcare had been considered not simply as a cost to be managed, but as an investment in economic and social infrastructure. The review had noted that high-quality provision benefited society as a whole, supported school readiness, lifelong wellbeing and efforts to reduce inequality, and was particularly important given that approximately 30.4% of children in Greater Manchester were living in poverty.

The review also highlighted that giving children the best start in life had led to better educational outcomes, improved economic opportunities and stronger communities. The review recognised the importance of quality provision, workforce support and retention, and called for further reform, including professional registration, a simplified funding model and greater devolution, so that Greater Manchester could build on existing work and continue to narrow the school-readiness gap.

**RESOLVED /-**

1. That the recommendations of the review be noted:
   a. Recognise early education and childcare as social and economic infrastructure enabler and its impact on prevention.
   b. Make early education and childcare a desired career choice.
   c. Increase data insight without additional burden.
   d. Champion the real living wage for all early education and childcare staff.
   e. Invest in career progression, continued professional development and training.
   f. Promote integrated models and social purpose businesses.
   g. Pursue market reform and national policy influence.
   h. Strengthen partnership working to create spaces for sector voice.

2. That the final review be endorsed

3. That it be noted that the final review will be shared with partners.

**GMCA 68/26 GREATER MANCHESTER RACE EQUITY FRAMEWORK**

Councillor Arooj Shah presented a report that provided a progress update on implementation of the Greater Manchester Race Equity Framework and set out key deliverables for the next 12 months.

Majid Hussain, Director of Equality and Inclusion at the Greater Manchester Integrated Care Board, Kofo Kego Oyeleye, Chair of the GM Race Equality Panel and Diane Edwards, Chair of the GM Civic Leadership Programme Steering Group were all present for the item.

Cllr Shah noted that the GMS required partners to stand up to racism and discrimination in order to achieve its wider ambitions across all workstreams and localities. The pandemic had highlighted and reinforced racial inequalities experienced by staff and residents, and that progress reports from all ten councils, TfGM, GMFRS and GMCA had identified collective progress, good practice, shared challenges and areas requiring further focus. It was recognised that progress had been made through more visible leadership, stronger staff support, improved use of data and insight, and more targeted interventions, but that activity needed to be scaled up and delivered more consistently across organisations and the Greater Manchester system.

The contributions from Diane Edwards, Majid Hussain and Kofo Kego Oyeleye highlighted the impact of civic leadership programmes, the need for system-wide action in response to racism experienced by staff, patients and communities, and the importance of translating progress into tangible improvements in outcomes. There was also emphasis of the need for sustained leadership, accountability, better collection and publication of data, and continued collaboration through the Race Equity Group to ensure that staff and communities could see demonstrable impact in tackling racism and racial inequalities.

**RESOLVED /-**

1. That the collective progress in implementing the Race Equity Framework be noted.

2. That the collective key deliverables for the next 12 months be agreed.

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.

4. That all will champion racial equity and proactively lead commitment to anti-racism at every opportunity.

**GMCA 69/26 PREVENTION DEMONSTRATOR – MOVING TO DELIVERY**

Warren Heppolette, Prevention Demonstrator Director, presented a report that set out Greater Manchester's approach to implementation as the UK's first national Prevention Demonstrator.

The report emphasised the importance of a fully realised Live Well ambition to GM's approach as a preventative system. It described the evaluation framework to confirm how to capture the evidence and impact of what works to improve outcomes and reduce demand and cost. It confirmed the approach to system wide mobilisation and how to connect the learning from preventative approaches to planning and budget setting processes.

**RESOLVED /-**

1. That the GMCA supports the approach to mobilise the Prevention Demonstrator.

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.

3. That the alignment of resources across the key preventative programmes be maximised.

4. That the outputs of the evaluation will be connected into medium term financial planning and devolution negotiations with government.

**GMCA 70/26 PRIVATE HIRE VEHICLE SUPPORT FUND**

Caroline Simpson, Group Chief Executive, presented a report that sought approval to revise the previously agreed Private Hire Vehicle (PHV) Support Fund by removing the loan element and moving to a grant-only model to help eligible private hire vehicle owners replace older, non-compliant vehicles with cleaner compliant vehicles.

Members welcomed the report but also emphasised the need to keep lobbying the government to end out of area working for vehicles licensed within authorities with lower requirements in terms of vehicle status.

**RESOLVED /-**

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 replacement vehicle and meet the eligibility criteria, as set out in the report.

2. That the eligibility criteria for the revised fund be approved, including retrospective eligibility, as set out at paragraph 3.2. of the report.

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.

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.

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