

**AGENDA FOR**  
**OVERVIEW AND SCRUTINY COMMITTEE**



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**To: All Members of Overview and Scrutiny Committee**

**Councillors :** J Rydeheard (Chair), J Southworth,  
M Rahimov, T Pilkington, L Ryder, A Chaudhry, N Bayley,  
S Haroon, C Birchmore, J Sheppard and J Roith

Dear Member/Colleague

**Overview and Scrutiny Committee**

You are invited to attend a meeting of the Overview and Scrutiny Committee which will be held as follows:-

|                             |                                                                                                                                                                                               |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Date:</b>                | Tuesday, 13 October 2026                                                                                                                                                                      |
| <b>Place:</b>               | Council Chamber - Town Hall                                                                                                                                                                   |
| <b>Time:</b>                | 7.00 pm                                                                                                                                                                                       |
| <b>Briefing Facilities:</b> | If Opposition Members and Co-opted Members require briefing on any particular item on the Agenda, the appropriate Director/Senior Officer originating the related report should be contacted. |
| <b>Notes:</b>               |                                                                                                                                                                                               |

## **AGENDA**

### **1 APOLOGIES**

### **2 DECLARATIONS OF INTEREST**

Members of the Overview and Scrutiny Committee are asked to consider whether they have an interest in any matters on the agenda and, if so, to formally declare that interest.

### **3 PUBLIC QUESTION TIME**

A period of 30 minutes has been set aside for members of the public to ask questions on matters considered at the last meeting and set out in the minutes or on the agenda for tonight's meeting.

### **4 MEMBER QUESTION TIME**

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

### **5 MINUTES** *(Pages 3 - 8)*

Minutes from the meeting held on 8<sup>th</sup> September 2026 are attached.

### **6 DRAFT 2027/28 BUDGET** *(Pages 9 - 70)*

Report from Councillor Thorpe Deputy Leader and Cabinet Member for Finance and Corporate Services is attached

### **7 URGENT BUSINESS**

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

**Minutes of:** OVERVIEW AND SCRUTINY COMMITTEE

**Date of Meeting:** 8 September 2026

**Present:** Councillor J Rydeheard (in the Chair)  
Councillors J Southworth, M Rahimov, T Pilkington, L Ryder,  
A Chaudhry, N Bayley, C Birchmore, J Sheppard and J Roith

**Also in attendance:** Councillor Thorpe Cabinet Member for Finance and Transformation  
Councillor Smith Cabinet Member for Environment, Climate Change and Operations  
Neil Kissock Director of Finance  
Kate Waterhouse Executive Director (Strategy and Transformation)  
Ben Thomson Assistant Director for Public Protection  
Jacqui Dennis Director of Law and Democratic Services – Monitoring Officer

**Public Attendance:** One member of the public was in attendance at the meeting

**Apologies for Absence:** Councillor S Haroon

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**OSC.119 APOLOGIES**

Apologies are noted above.

**OSC.120 DECLARATIONS OF INTEREST**

There were no declarations of interest.

**OSC.121 PUBLIC QUESTION TIME**

There were no public questions.

**OSC.122 MEMBER QUESTION TIME**

There were no Member questions.

**OSC.123 MINUTES**

That the minutes of the meeting held on 8<sup>th</sup> September 2026 be approved as a correct record and signed by the Chair.

**OSC.124 PRE SUBMITTED QUESTIONS AND ANSWERS (Pages 7 - 18)**

**OSC.125 FINANCE Q1**

The Committee considered the Quarter 1 Finance Monitoring Report and accompanying appendix. Councillor Thorpe Deputy Leader and Cabinet Member for Finance and Corporate Services, presented an overview of the report, explaining that it outlined the Council's financial

position at the end of Quarter 1, performance against budget assumptions, and the forecast outturn position. Members were advised that the report represented an early indication of financial performance and that forecasts would continue to be refined throughout the year.

Discussion took place regarding the Dedicated Schools Grant (DSG) deficit and the Government's SEND reform programme. Members heard that significant financial pressures continued to arise from independent and out-of-borough SEND placements, with work ongoing to increase local provision and reduce reliance on higher-cost placements.

Councillor Birchmore sought clarification on the Council's plans to increase SEND provision within mainstream schools and whether academies would be expected to support this approach. In response, it was explained that additional funding was being used to build capacity across schools, enabling them to accommodate a wider range of needs and support more pupils locally.

Further discussion focused on the increasing demand for SEND support and the associated costs. Members were advised that the Council's strategy aimed to provide appropriate provision across the full spectrum of need whilst reducing expenditure on expensive external placements. It was noted that improved diagnostics, earlier intervention and increased local capacity would contribute to a more sustainable model over time.

In response to a supplementary question regarding anticipated savings and the location of new SEND provision, Members were informed that a new 60-place provision was intended to reduce out-of-borough placements and would deliver significant savings. Further details would be provided outside the meeting.

Members also considered expenditure relating to children's residential placements. Councillor Rahimov asked whether the Council was exploring the development of its own residential provision. The Committee heard that two projects were currently being progressed, including collaborative work across Greater Manchester, although not all children would be suited to internally provided accommodation due to the complexity of some cases. Officers advised that establishing residential provision required significant lead-in time, including Ofsted registration, but remained a key element of the Council's strategy to reduce placement costs and improve outcomes.

The Committee noted continuing financial pressures within children's services, including fostering and residential care costs. Members were informed that whilst some placement costs were beginning to stabilise, market conditions remained challenging.

Questions were also asked regarding project delays, additional costs associated with facilities within the Radcliffe Hub development, and whether the Council would benefit financially from commercial arrangements linked to those facilities.

Officers advised that project costs had been updated to reflect revised assumptions and changing market conditions. Whilst some costs were higher than originally expected, a number of these were one-off costs which would not impact long-term revenue budgets. Reference was also made to revisions within the Medium-Term Financial Strategy.

The Committee discussed vacancy management and staffing savings identified within the report. Councillor Rydeheard queried the level of savings being achieved through recruitment delays. In response, Members were informed that critical social care roles would continue to be prioritised, whilst recruitment to non-critical vacancies may be delayed to support financial management. It was acknowledged that challenges remained in recruiting to specialist roles, particularly within legal services and social care.

Jacqui Dennis the councils monitoring officer, emphasised that recruitment difficulties continued across a number of professional disciplines. The Committee noted that the use of agency and temporary resources remained necessary in some areas where recruitment challenges persisted.

Councillor Birchmore raised concerns regarding Housing Revenue Account procurement processes and delays in delivering repairs and maintenance work, referencing specific examples raised by residents. In response, Members were informed that procurement arrangements had improved significantly in recent years, with stronger contract management, more accurate contract registers and greater use of framework agreements to secure value for money.

Neil Kissock highlighted ongoing efforts to strengthen procurement processes and improve contract oversight, whilst continuing to recruit to key procurement posts.

Members also discussed the recruitment and retention of social workers. Councillor Pilkington asked whether work had been undertaken to improve the Council's offer in comparison with neighbouring authorities. The Committee heard that improvements to pay, conditions and workforce support had resulted in a more stable workforce and reduced reliance on temporary staff. Members noted that this had contributed positively to outcomes for children and families.

Further questions were raised regarding the Housing Revenue Account and the potential for bringing more services in-house rather than relying on external contractors. Members were advised that this remained under consideration as part of wider service reviews, and that a separate HRA report would provide further detail on the issue.

Councillor Chaudhry queried the overspend identified in relation to corporate printing and postage. Officers explained that a number of factors contributed to the pressure, including election-related activity and the continued use of physical correspondence. Members were advised that work was ongoing to increase digital communication and reduce printing and postage costs through an invest-to-save approach.

#### **It Was Agreed**

- The report be noted

### **OSC.126 2025/26 TREASURY OUTTURN REPORT**

The Committee considered a report and appendix presented by Councillor Thorpe, Deputy Leader and Cabinet Member for Finance and Corporate Services, providing an update on Treasury Management activity during the first quarter of 2025/26.

Councillor Thorpe introduced the report, noting that Treasury Management is a highly technical area that includes monitoring prudential indicators, borrowing arrangements, investment activity and wider economic factors. He highlighted the ongoing uncertainty within global financial markets, including the potential impact of international conflicts and economic conditions on investment returns and borrowing costs.

Councillor Pilkington referred to the Council's investment activity and opportunities for revenue generation, seeking clarification on the associated challenges.

In response, Councillor Thorpe explained that national regulations surrounding borrowing to invest have been significantly tightened in recent years. Whilst local authorities had historically undertaken borrowing for commercial investment purposes, such activity is now subject to

greater restriction due to the risks involved. He advised that, given current economic conditions and the financial pressures facing councils nationally, the authority's focus remains on prudent investment activity, protecting public funds and securing appropriate returns without engaging in speculative investment. He emphasised that the Council continues to explore opportunities to improve investment returns where appropriate.

Neil Kissock added that the Council does not wish to increase its risk profile in pursuit of additional returns and therefore adopts a cautious approach to investment management.

Councillor Birchmore referred to Table 5 of the report and noted that a number of loans were due to mature during the year. She asked whether the financial implications of refinancing these loans had been factored into the Council's financial planning and whether this could create additional budgetary pressures.

Councillor Rahimov further asked whether refinancing arrangements generally maintain existing loan terms or whether repayment periods are extended where appropriate.

In response, Neil Kissock explained that the Council's borrowing portfolio is largely based on fixed interest rate loans. As loans mature, officers continually review the most advantageous options available in the market to refinance debt where necessary, taking account of prevailing interest rates and long-term affordability considerations. The timing of refinancing decisions is carefully managed to secure the best possible outcome for the authority.

Councillor Chaudhry referred to Table 8 and requested further information regarding the Council's non-financial investments, particularly the loans detailed within the table.

Councillor Thorpe advised that the Council had previously provided loan finance to Manchester Airport as part of its investment arrangements. He explained that returns are received through a combination of dividend income and loan repayments, which continue to contribute towards the Council's overall investment portfolio.

Councillor Roith sought clarification on the loan associated with Bruntwood referenced within Table 8.

Neil Kissock explained that the loan related to the acquisition of the Mill Gate Shopping Centre and formed part of the funding arrangements associated with that investment.

Councillor Rydeheard sought clarification regarding borrowing repayments and asked what measures are in place to prevent borrowing levels increasing unsustainably over time.

In response, Neil Kissock advised that the Council is currently developing its longer-term financial planning arrangements to ensure borrowing remains sustainable. He explained that financing costs are met through the Council's revenue budget, with income generated from assets contributing towards borrowing costs. This helps ensure that debt remains manageable and affordable.

Councillor Rydeheard also asked about the difference between borrowing undertaken through the Housing Revenue Account (HRA) and non-HRA borrowing.

Neil Kissock explained that HRA borrowing operates under different arrangements and can often attract lower borrowing costs. Different statutory and accounting requirements apply, including provisions relating to debt repayment and the treatment of housing assets. As a result, there are distinct differences between HRA and General Fund borrowing in terms of funding arrangements and debt management.

The Chair noted that advance questions had also been received from Councillor Sheppard and Councillor Birchmore and that responses had been circulated to Members prior to the meeting.

**It Was Agreed:**

- The report be noted

**OSC.127 AWARD OF EVCI GM CONTRACT TO INSTALL EV CHARGEPOINTS THROUGHOUT BURY PART A**

Councillor Smith, Deputy Leader and Cabinet Member for Environment, Climate Change and Operations, presented a report seeking approval for TfGM to award a 20 year concession contract for the installation of electric vehicle chargepoints across the borough, supported by significant government funding.

Councillor Birchmore asked whether the cost of charging would be comparable to charging at home and suggested consideration of shallow-footing gullet chargers for residents without off-street parking.

In response, Ben Thomson, Assistant Director of Public Protection, advised that public charging costs would be set at market rates and that the aim was to provide affordable charging options. He added that pavement charging solutions could be explored in the future as technology and infrastructure develop.

Councillor Southworth Queried what controls would be in place to prevent the provider from significantly increasing charging costs.

Officers advised that charging costs would be monitored and contractual measures would be in place to ensure any price increases remain reasonable and proportionate.

**It was Agreed:**

- The committee noted the report

**OSC.128 EXCLUSIONS FROM PRESS AND PUBLIC**

**OSC.129 AWARD OF EVCI GM CONTRACT TO INSTALL EV CHARGEPOINTS THROUGHOUT BURY PART B**

The committee considered the Part B report relating to the procurement process and contract award.

A question was raised regarding the composition of the assessment panel and whether appropriate due diligence had been undertaken as part of the procurement process. Officers confirmed that the procurement exercise had been managed through TfGM's procurement service and that the necessary due diligence and evaluation processes had been completed.

Councillor Rydeheard sought clarification on the number of organisations involved in the procurement process and how they had been assessed. Officers advised that the procurement exercise had been re-evaluated and that four organisations had initially been involved. Following the final evaluation process, the recommended contractor achieved the highest overall ranking and was selected as the preferred bidder.

The committee noted the information provided and supported the recommendations contained within the Part B report.

**It Was Agreed:**

- The update be noted

**OSC.130 URGENT BUSINESS**

There was no urgent business.

**COUNCILLOR J RYDEHEARD**  
**Chair**

**(Note: The meeting started at 7.00 pm and ended at 8.30 pm)**



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

|                   |                                                                         |                                    |
|-------------------|-------------------------------------------------------------------------|------------------------------------|
| <b>Report to:</b> | Overview & Scrutiny Committee<br>Cabinet                                | 13 October 2026<br>14 October 2026 |
| <b>Subject:</b>   | Draft 2027/28 Revenue Budget and Medium-Term Financial Strategy 2028-30 |                                    |
| <b>Report of</b>  | Cabinet Member for Finance and Transformation                           |                                    |

### Summary

- To present to members the updated budget position for 2027/28, comprising:
  - Refreshed budget assumptions and funding movements.
  - Draft revenue savings.
- To inform members of the updated budget gap of £34.959m for the three years 2027/28 to 2029/30 before applying any of the offsetting revenue budget proposals, comprising:
  - 2027/28 £20.332m
  - 2028/29 £3.817m
  - 2029/30 £10.811m
- To present a draft set of savings of £10.747m in 2027/28, £6.172m in 2028/29 and £0.533m in 2029/30, totalling £17.451m, which are in line with the Council's strategy to close the budget gap over the medium-term.
- To inform members of the remaining budget gap of £17.508m comprising:
  - 2027/28 £9.585m
  - 2028/29 (£2.355m)
  - 2029/30 £10.278m
- To inform members of the forecast reserves position over the three years 2027/28 to 2029/30.
- To set out the 2027/28 budget setting process ahead of Budget Council on 24 February 2027.

### Role of Overview and Scrutiny Committee in the budget process

- Under the Council's Constitution, the Overview and Scrutiny Committee is required to advise and consider the Cabinet's budget, Council Tax proposals and report to Cabinet on the outcome of its deliberations before the matter is referred to Council.
- In considering the budget proposals, the Committee can challenge how the budget has been constructed. It may wish to probe the assumptions that lie behind the budget strategy, what are the main savings proposals, how will any growth be funded, and has an appropriate level of reserves been set.
- The Committee will also need to maintain a 'big picture' three-year view of the financial pressures affecting the Council and understand how these might impact on existing budget and budget setting in subsequent years. These issues are set out in the Financial Context and Background section below.

## **Recommendation(s)**

Overview and Scrutiny is asked to:

1. Note the report
2. Consider whether they wish to make any comments and recommendations to Cabinet on the content of this report.

Cabinet is asked to approve the following recommendations:

1. Approve the updated Medium-Term Financial Strategy to 2029/30, including the underlying assumptions regarding resources and spending requirements.
2. Approve the Draft 2027/28 Revenue Budget and Medium-Term Financial Strategy position as set out within this report, including the forecast remaining budget gap of £9.585m for 2027/28 and cumulative gap of £17.508m by 2029/30, as the basis for consultation and further budget development.
3. Approve the total budget assumptions of £29.945m in 2027/28.
4. Approve the new saving proposals totalling £17.451m over the period 2027/28 to 2029/30, including £10.747m in 2027/28, £2.686m of which are subject to the outcome of the public budget consultation of which £1.070m relates to 2027/28.
5. Note the total savings programme of £27.251m over the period of 2027/28 to 2029/30, including £17.560m in 2027/28.
6. Approve public consultation on the draft budget assumptions and new savings requiring a policy decision between 19<sup>th</sup> October to 30<sup>th</sup> November 2026.
7. Note that the outcomes of the budget consultation will be reported back to Members and used to inform the final budget setting proposals and referred to Overview & Scrutiny Committee for their consideration.
8. Note the draft proposal to increase Council Tax by 4.99% in 2027/28 and the remaining years of the MTFS 2028/30 (comprising 2.99% general increase and 2.0% adult social care precept) in line with the current referendum limits.
9. Note the progress to date in relation to the voluntary exit scheme.
10. Note the workforce savings, which is primarily the product of funding optimisation, vacancy deletion and organisational redesign and does not represent a change in policy. The intention is to bring forward further proposals to increase the overall workforce-related contributions (including the progression of the voluntary exit scheme).
11. Note the recurring savings and exit costs resulting from workforce reductions will be included in the Final Budget Report and reported to Cabinet and Council in February 2027.
12. Approve the use of flexible capital receipts or capitalisation direction in the form of borrowing to fund eligible severance and transformation costs arising from the delivery of the budget strategy and associated workforce proposals in accordance with the statutory guidance issued by MHCLG with the final allocation to be determined by the Director of Finance.
13. Approve the assumptions relating to sales, fees and charges included with the draft budget and note that detailed schedules will be presented as part of the Final Budget Report.
14. Note the forecast reserves balance for 2027/28 and limited capacity of reserves to support future budget gaps.
15. Note the Section 151 Officer's assessment of the Council's financial position and the reasons why exploration of Exceptional Financial Support is considered necessary;

16. Authorises the Section 151 Officer, in consultation with the Chief Executive, Monitoring Officer and the Cabinet Member for Finance and Corporate Services to explore Exceptional Financial Support with MHCLG, conduct negotiations, provide financial assurance and finalise and submit the application to cover any remaining funding gap in advance of final budget setting.

**Reasons for recommendation(s)**

1. The Council has a legal requirement annually to set a balanced budget and Council Tax and where necessary undertake consultation with the public, businesses, stakeholders and internally with staff and through Overview & Scrutiny Committee.
2. To update members on the Councils budgetary position and set out the work plan to reduce the forecast budget gap ahead of Budget Council on 24th February 2027.

**Alternative options considered and rejected**

3. The current assumption within the MTFS is for an on-going 4.99% annual Council Tax increase (2.99% general precept and 2% adult social care precept) which is built into the core spending power assumptions within the 2026/27 to 2028/29 Local Government Finance Settlement.
4. An alternative option could be made to increase its 'relevant basic amount of council tax' above the levels that will be set out in the Local Government Finance Settlement, but this would require holding a local referendum and a majority vote.
5. A 1% increase or decrease in Council Tax is equivalent to c£1.311m of additional funding.

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**Report Author and Contact Details:**

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*Department:* Corporate Core Department  
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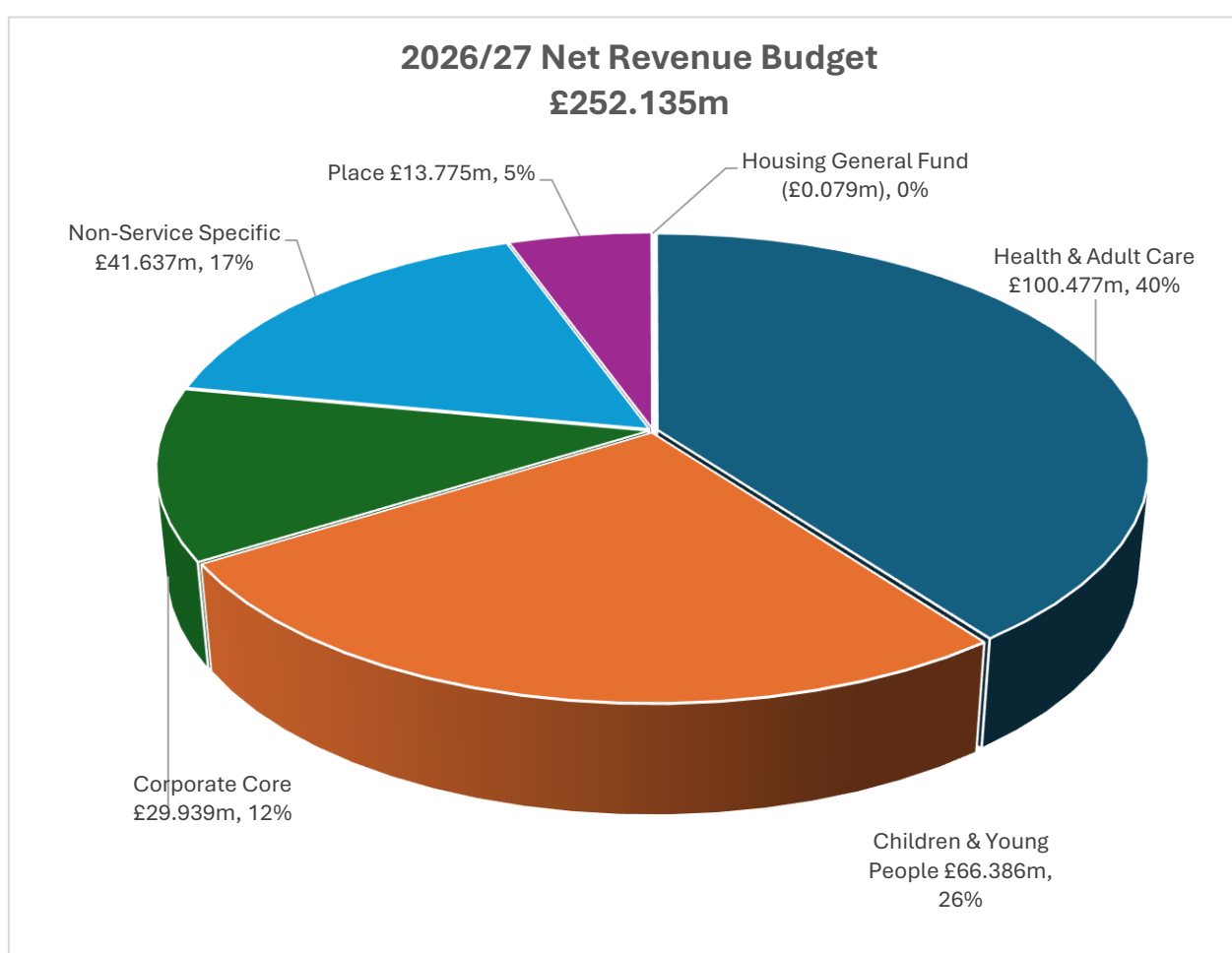
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## 1. Background

### 1.1. 2026/27 Base Budget

- 1.1.1. The 2026/27 Final Budget Report presented to Budget Council on 25 February 2026 set out the Council's budget requirement for the 2026/27 financial year and provided details on the Council's reserves position. The budget was developed in accordance with statutory requirements and proper accounting practices.
- 1.1.2. Council approved a net revenue budget of £252.135m for 2026/27. This included an approved use of £3.977m from the Budget Stabilisation Reserve to address the structural funding deficit and deliver a balanced budget.
- 1.1.3. The chart below shows the representation of the net revenue budget of £252.135m by Directorate.



### 1.2. 2026/27 Forecast Quarter One Position

- 1.2.1. Delivery of the approved 2026/27 budget remains critical to the Council's financial sustainability. Any recurring expenditure pressures emerging during the year will increase future funding requirements and place additional pressure on the Council's medium-term financial position.

1.2.2. The 2026/27 Quarter One Budget Monitoring report, presented to Cabinet on 9 September 2026, forecast an overspend of £5.691m (2.26%), against the Council's net revenue budget of £252.135m. A summary of the forecast position is shown in Table 1 below.

| <b>Table 1:<br/>2026/27 Quarter 1 Forecast<br/>Outturn</b> | <b>Revised<br/>Budget<br/>£m</b> | <b>Quarter 1<br/>Forecast<br/>Outturn<br/>£m</b> | <b>Quarter 1<br/>Forecast<br/>Variance<br/>£m</b> | <b>Forecast<br/>Variance<br/>%</b> |
|------------------------------------------------------------|----------------------------------|--------------------------------------------------|---------------------------------------------------|------------------------------------|
| Directorate:                                               |                                  |                                                  |                                                   |                                    |
| Health and Adult Care                                      | £100.477                         | £103.020                                         | £2.543                                            | 2.53%                              |
| Children and Young People                                  | £66.386                          | £68.598                                          | £2.212                                            | 3.33%                              |
| Corporate Core                                             | £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)                                         | -                                                 | 0.00%                              |
| <b>NET REVENUE BUDGET</b>                                  | <b>£252.135</b>                  | <b>£257.826</b>                                  | <b>£5.691</b>                                     | <b>2.26%</b>                       |
| Funding:                                                   |                                  |                                                  |                                                   |                                    |
| Council Tax                                                | (£124.998)                       | (£124.998)                                       | -                                                 |                                    |
| Business Rates                                             | (£109.326)                       | (£109.326)                                       | -                                                 |                                    |
| Government Funding Grants                                  | (£13.834)                        | (£13.834)                                        | -                                                 |                                    |
| <b>FUNDING</b>                                             | <b>(£248.158)</b>                | <b>(£248.158)</b>                                | <b>-</b>                                          |                                    |
| Use of Reserves:                                           |                                  |                                                  |                                                   |                                    |
| Budget Stabilisation Reserve                               | (£3.977)                         | (£3.977)                                         | -                                                 |                                    |
| <b>USE OF RESERVES</b>                                     | <b>(£3.977)</b>                  | <b>(£3.977)</b>                                  | <b>-</b>                                          |                                    |
| <b>BUDGET POSITION</b>                                     | <b>-</b>                         | <b>£5.691</b>                                    | <b>£5.691</b>                                     | <b>2.26%</b>                       |

1.2.3. The forecast overspend is largely concentrated within services that are experiencing significant demand-led and workforce related pressures. The most significant forecast variances are:

- **Health and Adult Social Care (HAC)**, mainly reflecting continuing demand and cost pressures within Care in the Community services.
- **Children and Young People (CYP)**, primarily attributable to ongoing price pressures within Children Looked After placements.
- **Corporate Core**, largely arising from agency and temporary staffing costs incurred to maintain service delivery where recruitment to permanent posts has proved challenging.

1.2.4. Adult Social Care and Children's Services continue to account for an increasing proportion of the Council's overall expenditure. Rising demand, increasing complexity of need and sustained market cost pressures continue to drive

expenditure growth above available budget provision. These challenges are being experienced nationally and are not unique to Bury.

- 1.2.5. The Quarter One forecast position has informed the development of the 2027/28 budget. Services have reviewed and updated their budget assumptions to reflect the latest information regarding demand trends, placement activity, care costs and workforce requirements. Whilst management actions continue to be implemented to mitigate in-year pressures, the forecast outturn position highlights the ongoing financial risks facing the Council.

## **2. Financial Overview**

### **2.1. National Context**

- 2.1.1. The Government's three-year Local Government Finance Settlement (LGFS), published in February 2026 following the implementation of Fair Funding Review 2.0 (FFR), provided an improved funding position for Bury compared with previous forecasts. The revised funding arrangements recognised a wider range of need and deprivation factors and, through the introduction of a multi-year settlement covering the period 2026/27 to 2028/29, provided greater certainty over future funding levels and supported longer-term financial planning.
- 2.1.2. The Government is expected to publish an update to the LGFS in late 2026, including confirmation of 2027/28 allocations. However, given the introduction of the three-year funding settlement, the Council does not anticipate any material increase in the overall national funding envelope and therefore has no basis to include any further additional Government funding to address future budget gaps within its Medium-Term Financial Strategy. This needs to be set against a backdrop of 36 councils only being able to set a budget in 2026/27 through accessing Exceptional Financial Support and that number is likely to significantly increase in 2027/28. The Local Government Association (LGA) is forecasting that the current £2bn funding shortfall for local government is likely to more than double by 2027/28.
- 2.1.3. Despite some improvement in the council's funding position arising from the 2026/27 Local Government Finance Settlement, this has not kept pace with increasing costs caused by sustained service demand growth, inflationary pressures and increasing service complexity. Whilst the settlement reduced the scale of the Council's financial challenge, it far from eliminated it. Bury continues to face a forecast budget gap of £9.585m for 2027/28, despite the identification and assumed delivery of a significant savings programme totalling £17.560m, comprising £6.813m of previously approved savings and £10.747m of new savings (see Section 5). Furthermore, the Council's financial resilience has weakened as reserves have been used to support budget sustainability and manage in-year pressures, with the forecast balance on the Budget Stabilisation Reserve no longer sufficient to meet the remaining budget gap. Further details on reserves are provided in Section 7.
- 2.1.4. Local authorities continue to face significant financial challenges arising from increasing demand for statutory services, particularly within Adult Social Care and Children's Services. Demand growth, increasing complexity of need, and

pressures within care markets continue to drive expenditure above underlying funding growth. In addition, increases in the National Living Wage and Real Living Wage continue to increase the cost of commissioned services, particularly within Adult Social Care.

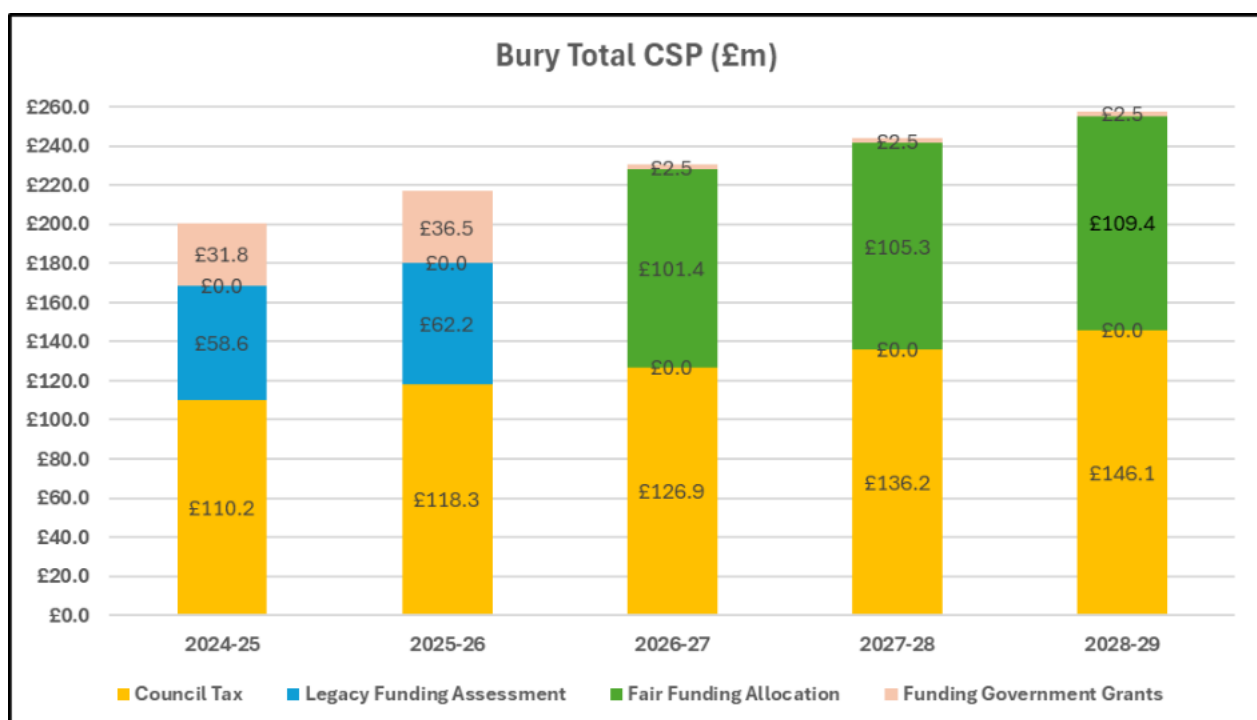
2.1.5. Whilst inflation has reduced from the levels experienced in recent years, borrowing costs remain significantly higher than historic averages, increasing the financing costs associated with capital investment and reducing financial flexibility. The Council continues to review the affordability and deliverability of its Capital Programme in light of construction inflation, supply chain pressures and borrowing costs.

2.1.6. Economic uncertainty continues to create risks around inflation, interest rates, demand for services and income generation. Consequently, the Council must continue to identify sustainable savings, efficiencies and transformation opportunities to ensure expenditure remains aligned to available resources.

## 2.2. Core Spending Power

2.2.1. Core Spending Power (CSP) is a measure of the resources available to local authorities to fund service delivery. It sets out the money that has been made available to local authorities through the LGFS.

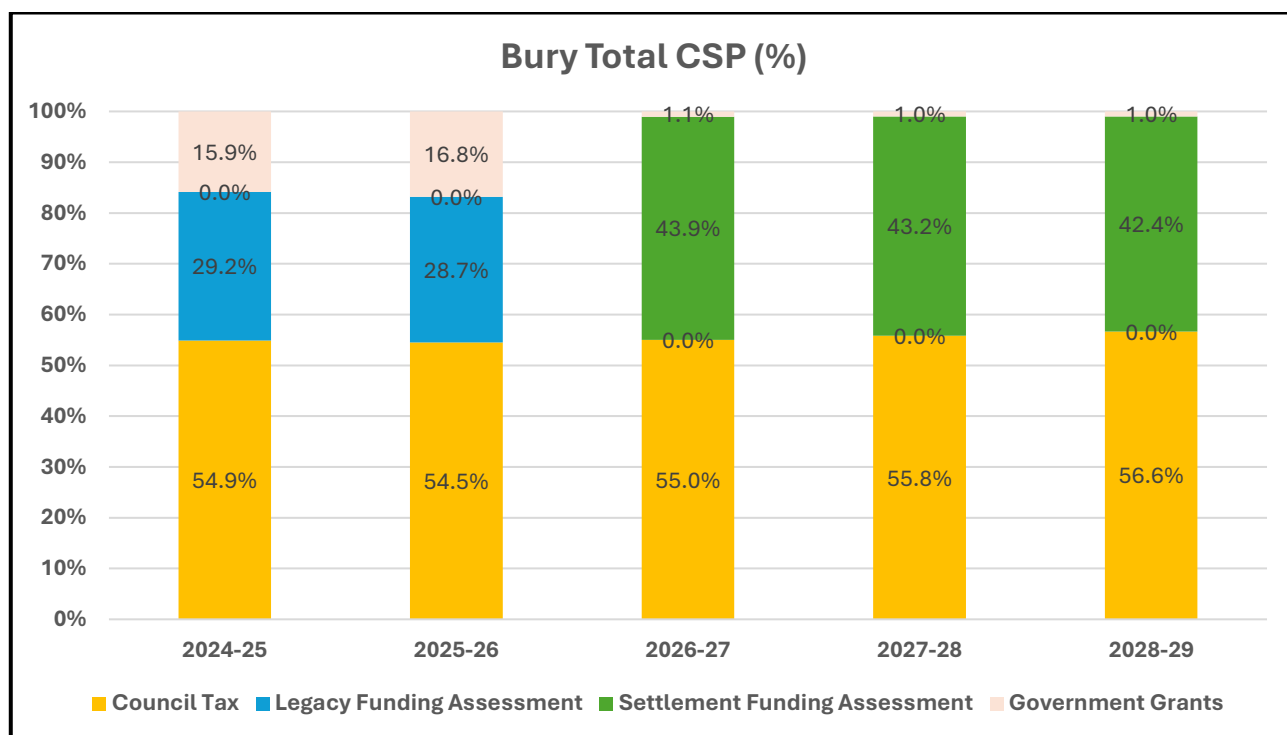
2.2.2. The graph below sets out the figures for local authority CSP from 2024/25 through to 2028/29. [Note figures for 2024/25 and 2025/26 have been adjusted to ensure a consistent measure of local authority income over time]. The published CSP includes four consolidated service grants which are ringfenced for specific service delivery and have therefore been excluded from the graph below.



## 2.3. Council Tax and Core Spending Power

2.3.1. Council Tax continues to represent an increasing proportion of the Council's overall CSP and financial sustainability is therefore becoming increasingly reliant upon locally generated income. Whilst the LGFS assumes that authorities will maximise the Council Tax increases permitted within referendum limits, the Council's ability to generate additional income through Council Tax base growth is more constrained. Forecast growth in the Council Tax base remains modest due to slower than anticipated delivery of planned housing developments, largely due to market viability challenges.

2.3.2. Table 2 below demonstrates that Bury has the smallest Council Tax Base within Greater Manchester. Consequently, whilst Council Tax represents an increasing proportion of the Council's funding, each 1% increase in Council Tax generates less income than in neighbouring authorities with larger tax bases. In addition, five Greater Manchester authorities have a higher average Band D Council Tax charge than Bury Council, enabling them to generate greater additional income from equivalent percentage increases in Council Tax. This limits the Council's ability to raise locally generated income and increases reliance on savings and transformation activity to maintain a sustainable financial position.



| Council Tax 2025/26      |                                                         |           |                                                                      |          |
|--------------------------|---------------------------------------------------------|-----------|----------------------------------------------------------------------|----------|
| Table 2:<br>GM Districts | Council Tax Base (CTB) for Council Tax Setting Purposes | Rank      | Ave Band D (2 Adult equivalent) Council Tax (excl. local precepts) £ | Rank     |
| Bolton                   | 82,271                                                  | 4         | £1,860.28                                                            | 7        |
| <b>Bury</b>              | <b>58,698</b>                                           | <b>10</b> | <b>£2,015.33</b>                                                     | <b>5</b> |
| Manchester               | 140,844                                                 | 1         | £1,783.78                                                            | 8        |
| Oldham                   | 59,501                                                  | 9         | £2,053.75                                                            | 3        |
| Rochdale                 | 59,825                                                  | 8         | £2,058.84                                                            | 2        |
| Salford                  | 78,626                                                  | 6         | £2,052.77                                                            | 4        |
| Stockport                | 99,340                                                  | 2         | £2,076.06                                                            | 1        |
| Tameside                 | 66,773                                                  | 7         | £1,911.99                                                            | 6        |
| Trafford                 | 81,602                                                  | 5         | £1,721.59                                                            | 9        |
| Wigan                    | 98,600                                                  | 3         | £1,630.90                                                            | 10       |

2.3.3. The table below provides a geographical analysis of both Council Tax & Core Spending Power (CSP) by population & number of dwellings over Greater Manchester authorities.

| Table 3:<br>Analysis of CTR & CSP by Population & Dwelling |                          |          |                              |          |
|------------------------------------------------------------|--------------------------|----------|------------------------------|----------|
| GM Districts                                               | 2027/28 CSP (per head) £ | Rank     | 2027/28 CSP (per dwelling) £ | Rank     |
| Bolton                                                     | £1,417.40                | 5        | £3,176.10                    | 5        |
| <b>Bury</b>                                                | <b>£1,278.11</b>         | <b>7</b> | <b>£2,908.94</b>             | <b>7</b> |
| Manchester                                                 | £1,702.04                | 1        | £3,765.78                    | 1        |
| Oldham                                                     | £1,482.75                | 4        | £3,642.73                    | 2        |
| Rochdale                                                   | £1,517.47                | 3        | £3,545.32                    | 3        |
| Salford                                                    | £1,644.94                | 2        | £3,239.09                    | 4        |
| Stockport                                                  | £1,217.65                | 9        | £2,720.92                    | 8        |
| Tameside                                                   | £1,393.68                | 6        | £3,048.57                    | 6        |
| Trafford                                                   | £1,041.33                | 10       | £2,427.54                    | 10       |
| Wigan                                                      | £1,243.36                | 8        | £2,692.82                    | 9        |
| <b>Average</b>                                             | <b>£1,393.87</b>         |          | <b>£3,116.78</b>             |          |

- 2.3.4. Based on CSP per head of population, Bury receives the seventh lowest level of funding among the ten Greater Manchester authorities at £1,278.11 per head in 2027/28, compared with a Greater Manchester average of £1,393.87.
- 2.3.5. Whilst the implementation of FFR 2.0 improved Bury's overall funding position, the Council's relative position compared with neighbouring authorities remains largely unchanged. Prior to the introduction of FFR 2.0, Bury received the eighth lowest level of funding per head across Greater Manchester at £1,067.58, compared with a Greater Manchester average of £1,138.00.
- 2.3.6. If Bury received funding at the Greater Manchester average level of CSP per head, the Council would benefit from additional recurring funding of approximately £9.9m per annum. This demonstrates that, whilst the FFR improved the Council's funding position, Bury continues to receive comparatively lower funding than many neighbouring authorities.

### **3. Budget Process**

#### **3.1. 2027/28 Budget Approach**

- 3.1.1. The vision for Bury 2030 is built upon conversations with communities and with a simple goal for Bury to:
- 3.1.2. **Stand out as a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation.**
- 3.1.3. Progress to achieving the ambition for Bury 2030 will be measured by tracking seven core outcome measures of:
1. Improved quality of life.
  2. Improved early years development.
  3. Improved educational attainment.
  4. Increased adult skill levels and employability.
  5. Inclusive economic growth.
  6. Carbon neutrality by 2038.
  7. Improved digital connectivity.

The Let's Do It! strategy sets out four clear principles that will drive everything the Council does of

1. **Local** neighbourhoods.
  2. An **Enterprising** spirit.
  3. Delivering **Together**.
  4. A **Strengths-based** approach.
- 3.1.4. Rolling two-year delivery plans are produced with a clear set of priorities to create the conditions for change. The current 2026/27 Corporate Plan sets out the vision for a council that is financially sound, delivers its statutory responsibilities and contributes to the Borough's LET'S Do It! outcomes.
- 3.1.5. The three core overarching priorities within the Corporate Plan remain unchanged for 2026/27 with an additional enabling priority, delivery of which will also secure

financial stability. The priorities overlay the “business as usual” departmental functions which are described separately in service planning documents.

3.1.6. The three core strategic priorities are defined as follows:

1. **Driving Inclusive Growth** – Further delivery of sustainable housing, completion of the levelling up programmes and ongoing strategic regeneration including a refreshed Local Plan and Northern Gateway Masterplan
2. **Improving Children’s Lives** – This priority details Educational Improvement including the three A’s (Attainment, Attendance and Academisation) and the continued delivery of the SEND and Social Care improvement plans.
3. **Tackling Inequalities** – Addressing the wider determinants of health: work, housing anti-poverty and tackling behaviours that will improve outcomes and **reduce the demand for statutory services.**

3.1.7. Delivery of the priorities of the corporate plan will directly support financial resilience by strengthening the council’s tax base from the benefits of economic growth, whilst tackling demand through quality statutory services which take a prevention-first approach. Progress has been made across all priorities over the last budget year, with intervention removed from all statutory children’s services and adult social care services rated as “Good” and a programme of regeneration completions which will increase both council tax and business rates receipts. Despite this, the increased demand for Children’s Social Care, SEND, Adult Social Care and Housing, have placed in year pressures on the budget, as reflected in the current in-year forecast outturn position outlined earlier in the report. As such, further work has been undertaken to look at how work on these areas can be re-focused to reduce in-year pressures and support the budget strategy.

#### **4. Budget Movements: Assumptions & Funding**

##### **4.1. Budget Update: October 2026**

4.1.1. Since the approval of the 2026/27 Budget Report and the 2027/29 MTFS by Council in February 2026, a review of the MTFS assumptions and funding projections has been undertaken. As set out in Section 2, there have been limited changes to the Council’s funding position following the publication of the Government’s multi-year Local Government Finance Settlement on 9 February 2026 covering the period 2026/27 to 2028/29.

4.1.2. The table below summarises the changes to the MTFS since February 2026 and shows a forecast cumulative budget gap of £34.959m over the three-year period 2027/28 to 2029/30. This represents a net increase of £13.804m compared with the position reported in February 2026, prior to the inclusion of proposed savings. The financial movements in 2027/28 and 2028/29 relate to changes in assumptions from the MTFS position previously reported in February which only covered the period up to and including 2028/29. 2029/30 is therefore included for the first time in the reported MTFS and the movements actually reflect the total forecast additional budget movement from 2028/29.

| Table 4:<br>2027/28 - 2029/30 Budget<br>Movements Summary          | Oct 26         |                 |                 |
|--------------------------------------------------------------------|----------------|-----------------|-----------------|
|                                                                    | 2027/28<br>£m  | 2028/29<br>£m   | 2029/30<br>£m   |
| <b>BUDGET GAP [FEB 2026]</b>                                       | <b>£13.898</b> | <b>£7.257</b>   | <b>-</b>        |
| <b>Budget Assumptions Movements:</b>                               |                |                 |                 |
| Pay Award                                                          | (£0.145)       | (£0.109)        | £3.359          |
| Pay Base Movements                                                 | £0.621         | (£0.003)        | -               |
| Contractual Inflation                                              | £0.367         | (£0.499)        | £3.974          |
| Real Living Wage                                                   | £1.482         | £2.251          | £5.828          |
| General Inflation                                                  | (£0.016)       | (£0.082)        | £0.002          |
| Demand/Volume/Activity Base<br>Movements                           | £4.084         | (£0.070)        | £3.216          |
| Grants, Contributions & Income<br>Recovery                         | £0.066         | £0.019          | -               |
| Sales, Fees & Charges Levels                                       | (£0.822)       | (£1.396)        | (£1.823)        |
| Recharges HRA, School, Capital &<br>Internal                       | £0.080         | -               | -               |
| Precepts & Levies                                                  | £0.617         | (£0.159)        | £1.121          |
| Treasury & Capital                                                 | £3.094         | -               | £0.500          |
| Provisions & Contingency                                           | (£3.266)       | (£4.268)        | £0.793          |
| <b>NET BUDGET MOVEMENT</b>                                         | <b>£6.161</b>  | <b>(£4.352)</b> | <b>£16.970</b>  |
| <b>Funding Movements:</b>                                          |                |                 |                 |
| Council Tax Base update (added for<br>insertion of 29/30 to MTFS)  | £0.273         | £0.911          | (£7.022)        |
| Business Rates estimated (added for<br>insertion of 29/30 to MTFS) | -              | -               | (£2.270)        |
| Recovery Grant (end of three-year<br>settlement)                   | -              | -               | £2.488          |
| Extended Producer Responsibility<br>Grant                          | -              | -               | £0.645          |
| <b>ASSUMED FUNDING MOVEMENT</b>                                    | <b>£0.273</b>  | <b>£0.911</b>   | <b>(£6.159)</b> |
| <b>UPDATED BUDGET GAP [OCT<br/>2026]</b>                           | <b>£20.332</b> | <b>£3.817</b>   | <b>£10.811</b>  |
| <b>CUMULATIVE BUDGET GAP [OCT<br/>2026]</b>                        | <b>£20.332</b> | <b>£24.149</b>  | <b>£34.959</b>  |

## 4.2. Budget Assumptions

- 4.2.1. Since February 2026, the 2027/28 budget gap has a net increase of £6.434m, comprising of an increase in budget assumptions of £6.161m and a decrease in expected funding of £0.273m. Significant items include:

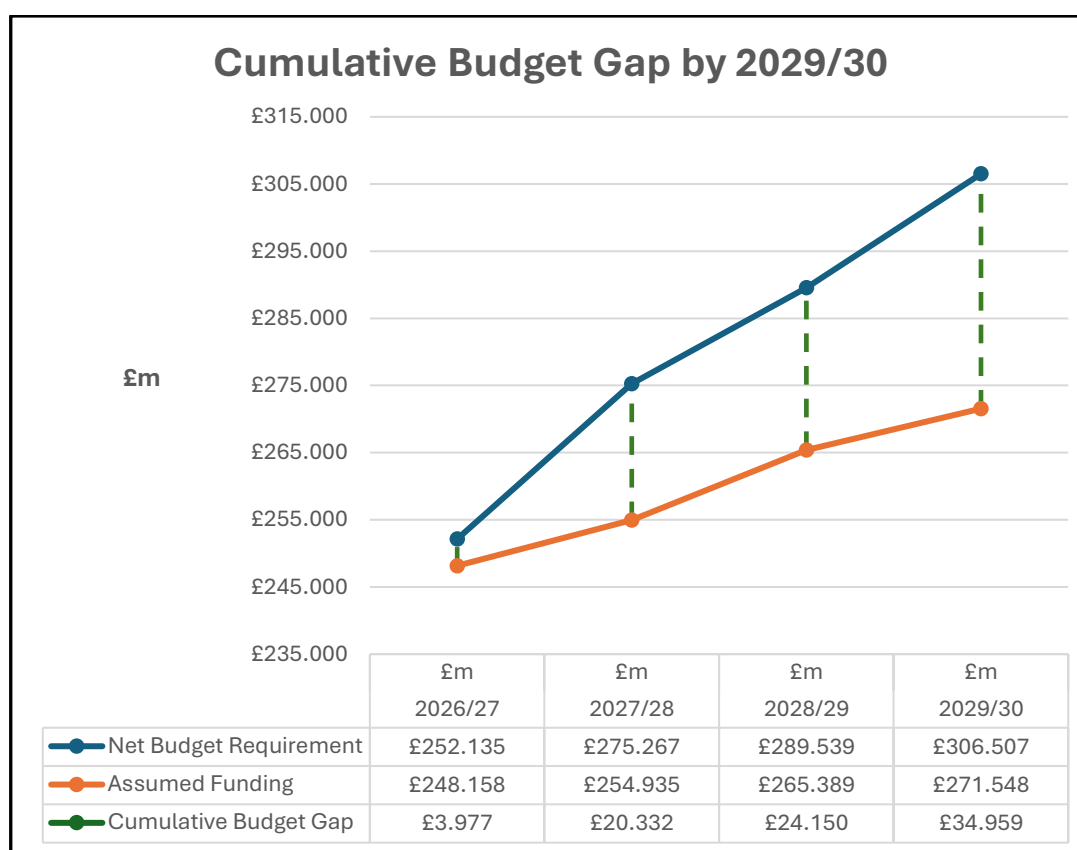
- 4.2.2. **Pay Base movements:** this reflects various changes, including investment in transformational activity and changes in funding arrangements of certain teams.
- 4.2.3. **Contractual Inflation:** services have refreshed their inflation assumptions, resulting in a net increase of £0.367m in 2027/28. This movement reflects a combination of increases and decreases across a range of contractual budgets.
- 4.2.4. **Real Living Wage:** the assumption for 2027/28 relates mainly to the Adults Community Care Budget and has been updated with a rate of 6.4% which will impact primarily on adult social care fee levels. Whilst there is an increase of £1.482m, client contributions have also been increased by £0.904m.
- 4.2.5. **Demand/Volume Activity:** Departments have reviewed and refreshed demand and volume assumptions using the latest service data and knowledge. This has resulted in an increase of £4.084m in the 2027/28 budget requirement. The increase primarily reflects growing demand pressures identified through the 2026/27 Quarter 1 monitoring process, resulting in a reassessment of underlying service demand assumptions. Further details on the Quarter 1 revenue monitoring position are provided in Section 1, with a more detailed analysis of demand pressures by Directorate set out in Appendix 3.
- 4.2.6. **Sales, Fees and Charges:** the majority of this movement is in relation to the increased client contribution within Health & Adult care as a result of the uplifted Real Living Wage assumption.
- 4.2.7. **Precepts & Levies:** the assumptions include the latest inflationary uplift information provided to the council by Greater Manchester Combined Authority (GMCA) and the reversal of one-off funding received back from GMCA waste levy reserves in the current financial year.
- 4.2.8. **Treasury & Capital:** Investment income and interest payable budgets have been revised to reflect the latest forecast borrowing profile. The Council is required to refinance a number of loans reaching maturity, and prevailing interest rates remain higher than those attached to the existing debt. Consequently, future borrowing costs are forecast to increase, placing additional pressure on the interest payable budget.
- 4.2.9. **Provisions and Contingency:** Due to ongoing uncertainty within the wider economic environment, some contingency budgets relating to the pay award, contractual inflation, service demand pressures and the general budget were held centrally within the Non-Service Specific budget as part of the February 2026 budget setting process. These assumptions have now been reviewed and updated, with the associated budgets reallocated to the relevant service departments where the expenditure is expected to arise and the value of that expenditure is now more certain. This has resulted in a net budget reallocation of £3.266m in 2027/28.

- 4.2.10. **Funding:** Council tax growth assumptions have been refreshed, resulting in a £0.273m forecast reduction in the Council's taxbase compared to previous assumptions.

### 4.3 Cumulative Budget Gap from 2026/27 to 2029/30

- 4.3.1 The chart below illustrates the cumulative budget gap of £34.959m over the medium-term planning. While Council approved a balanced budget on 25 February 2026, this was supported by a £3.977m contribution from reserves, reflecting the continued financial pressures facing the Council.

- 4.3.2 The chart excludes the use of reserves in order to demonstrate the underlying structural position. It shows that the cost of delivering Council services, driven by ongoing demand growth, inflationary pressures and increasing complexity of need, is forecast to exceed the funding available from Council Tax, Business Rates and Government funding. Consequently, expenditure is projected to increase at a faster rate than the Council's funding base, resulting in a recurring budget gap over the medium term.



### 4.4 Summary

- 4.4.1 Table 5 shows the net budget brought forward from 2026/27, together with forecast budget assumptions, previously approved savings and assumed funding levels, to derive the estimated budget position for 2027/28 to 2029/30. Prior to the identification of any new savings proposals, the Council faces a budget gap of £20.332m in 2027/28, rising to a cumulative budget gap of £34.959m by

2029/30. This demonstrates the scale of the financial challenge facing the Council and the significant level of further savings required to deliver a balanced budget.

| Table 5:<br>2027/28 - 2029/30 Budget Estimates | Oct 26            |                   |                   |
|------------------------------------------------|-------------------|-------------------|-------------------|
|                                                | 2027/28<br>£m     | 2028/29<br>£m     | 2029/30<br>£m     |
| <b>2026/27 Net Budget b/fwd</b>                | <b>£252.135</b>   | <b>£275.268</b>   | <b>£289.539</b>   |
| <b>Budget Assumptions:</b>                     |                   |                   |                   |
| Pay Award                                      | £3.166            | £3.261            | £3.359            |
| Pay Base Movements                             | £0.447            | (£0.044)          | -                 |
| Contractual Inflation                          | £4.773            | £3.678            | £3.974            |
| Real Living Wage                               | £5.329            | £5.521            | £5.828            |
| General Inflation                              | (£0.016)          | £0.001            | £0.002            |
| Demand/Volume/Activity Base Movements          | £7.064            | £3.824            | £3.216            |
| Grants, Contributions & Income Recovery        | £1.352            | £0.019            | -                 |
| Sales, Fees & Charges Levels                   | (£1.022)          | (£1.396)          | (£1.823)          |
| Recharges HRA, School, Capital & Internal      | £0.123            | £0.045            | -                 |
| Precepts & Levies                              | £2.295            | £1.081            | £1.121            |
| Treasury & Capital                             | £5.844            | £0.500            | £0.500            |
| Provisions & Contingency                       | £0.591            | £0.770            | £0.791            |
| <b>Total Budget Assumptions</b>                | <b>£29.945</b>    | <b>£17.259</b>    | <b>£16.968</b>    |
| <b>Approved Savings:</b>                       |                   |                   |                   |
| Savings – approved Feb 26                      | (£6.813)          | (£2.987)          | -                 |
| <b>Total Approved Savings</b>                  | <b>(£6.813)</b>   | <b>(£2.987)</b>   | <b>-</b>          |
| <b>NET BUDGET</b>                              | <b>£275.267</b>   | <b>£289.539</b>   | <b>£306.507</b>   |
| <b>Assumed Funding:</b>                        |                   |                   |                   |
| Council Tax                                    | (£131.135)        | (£137.816)        | (£144.838)        |
| Business Rates                                 | (£120.022)        | (£124.440)        | (£126.710)        |
| Government Funding Grants                      | (£3.778)          | (£3.133)          | -                 |
| <b>ASSUMED FUNDING</b>                         | <b>(£254.935)</b> | <b>(£265.389)</b> | <b>(£271.548)</b> |
| <b>ANNUAL INCREMENTAL BUDGET GAP</b>           | <b>£20.332</b>    | <b>£3.817</b>     | <b>£10.810</b>    |
| <b>CUMULATIVE BUDGET GAP</b>                   | <b>£20.332</b>    | <b>£24.149</b>    | <b>£34.959</b>    |

#### 4.5 Key Budget Assumptions:

- 4.5.1 The table below show the key budget and funding assumptions used throughout the updated MTFS:

| <b>Table 6:</b><br><br><b>MTFP Summary: Budget Assumptions</b> | <b>Oct-26</b>        |                      |                      |
|----------------------------------------------------------------|----------------------|----------------------|----------------------|
|                                                                | <b>2027/28<br/>%</b> | <b>2028/29<br/>%</b> | <b>2029/30<br/>%</b> |
| <b>Net Budget:</b>                                             |                      |                      |                      |
| Pay Award                                                      | 3.00%                | 3.00%                | 3.00%                |
| Real Living Wage                                               | 6.40%                | 6.40%                | 6.40%                |
| Cost of Borrowing                                              | 5.00%                | 5.00%                | 5.00%                |
| Waste Levy                                                     | 4.07%                | 4.07%                | 4.07%                |
| Transport Levy                                                 | 3.00%                | 3.00%                | 3.00%                |
| <b>Funding:</b>                                                |                      |                      |                      |
| Council Tax Base Increase                                      | 0.55%                | 0.10%                | 0.10%                |
| Council Tax Rate Increase (Relevant Basic Amount)              | 2.99%                | 2.99%                | 2.99%                |
| Council Tax Rate Increase (Adult Social Care)                  | 2.00%                | 2.00%                | 2.00%                |

- 4.5.2 In 2027/28, the Council's Tax Base is forecast to increase by 0.55%, reflecting both growth in the number of properties and the impact of a Single Person Discount review. For the period 2028/29 to 2029/30, Tax Base growth is forecast at 0.10% per annum, reflecting limited forecast growth in the number of properties across the borough.

#### 5. Previously Approved and New Savings

##### 5.1 Total Savings Programme 2027/28 to 2029/30

- 5.1.1 As outlined in Table 4 in Section 4, the Council's forecast budget gap for 2027/28 has increased by £6.434m since the MTFS was approved by Council in February 2026 and now stands at £20.332m. In response to the scale of this challenge and as per the approach outlined in February, the Council has undertaken a comprehensive financial review and challenge process. This involved a detailed service challenge process across all Council services being undertaken in quarter 1 supported by external reviews of Health and Adult Social Care and Children's Services to support the identification of opportunities for further savings.

- 5.1.2 As a result of this work, the Council has identified £10.747m of new savings proposals in 2027/28, rising to £17.451m over the period 2027/28 to 2029/30. Together with £9.800m of previously approved savings, the Council's total savings programme now amounts to £27.251m over the medium-term financial planning period which is significant as a proportion of the council's budget. See Appendix 1 for the full list of savings.
- 5.1.3 Subject to approval and delivery of these proposals, the forecast budget gap for 2027/28 would reduce from £20.332m to £9.585m. Despite the scale of the savings programme identified to date, significant financial challenges remain, with a residual budget gap of £9.585m in 2027/28 and a cumulative gap of £17.508m by 2029/30.
- 5.1.4 The subjective analysis of the 2027/28 budget by department can be found in Appendix 3.

## 5.2 New Savings Proposals Since February 2026

- 5.2.1 The new savings proposals identified since February 2026 comprise both policy and non-policy decisions. Of the £17.451m total new savings, £14.765m relates to non-policy decisions which can be implemented through management action, whilst £2.686m requires a policy decision and formal consultation prior to implementation.
- 5.2.2 A summary of the proposals is shown in Table 7 below. Savings requiring a policy decision are included in the table in Appendix 2 and details can be seen in savings templates also appended to this report. These are: -
- Green Waste charging
  - Street Lighting Trim
  - Removal of Homecare Charging Cap
  - Income Maximisation for Leisure
  - School Crossing Patrols
  - Youth Service redesign
- 5.2.3 The Council previously agreed savings in February 2026 related to Car Parking and Highways Enforcement, the proposals for their delivery and consultations will be presented to Cabinet in November 2026.

| <b>Table 7:<br/>2027/28- 2029/30 Budget Proposals<br/>Summary</b> | <b>Oct-26</b>         |                       |                       |                     |
|-------------------------------------------------------------------|-----------------------|-----------------------|-----------------------|---------------------|
|                                                                   | <b>2027/28<br/>£m</b> | <b>2028/29<br/>£m</b> | <b>2029/30<br/>£m</b> | <b>Total<br/>£m</b> |
| <b>BUDGET GAP [OCT 2026]</b>                                      | <b>£20.332</b>        | <b>£3.817</b>         | <b>£10.811</b>        | <b>£34.959</b>      |
| <b>Draft Budget Proposals:</b>                                    |                       |                       |                       |                     |
| Non-Staffing Budget Proposals (Non-Policy Decision)               | (£5.501)              | (£3.302)              | (£0.483)              | <b>(£9.285)</b>     |

|                                                 |                  |                 |                 |                  |
|-------------------------------------------------|------------------|-----------------|-----------------|------------------|
| Staffing Budget Proposals (Non-Policy Decision) | (£4.176)         | (£1.304)        | -               | (£5.480)         |
| <b>Total Non-Policy Decisions</b>               | <b>(£9.677)</b>  | <b>(£4.605)</b> | <b>(£0.483)</b> | <b>(£14.765)</b> |
| Non-Staffing Budget Proposals (Policy Decision) | (£0.825)         | (£1.479)        | (£0.050)        | (£2.354)         |
| Staffing Budget Proposals (Policy Decision)     | (£0.245)         | (£0.087)        | -               | (£0.332)         |
| <b>Total Policy Decisions</b>                   | <b>(£1.070)</b>  | <b>(£1.566)</b> | <b>(£0.050)</b> | <b>(£2.686)</b>  |
| <b>Total New Savings</b>                        | <b>(£10.747)</b> | <b>(£6.172)</b> | <b>(£0.533)</b> | <b>(£17.451)</b> |
| <b>ANNUAL INCREMENTAL BUDGET GAP</b>            | <b>£9.585</b>    | <b>(£2.355)</b> | <b>£10.278</b>  | <b>£17.508</b>   |
| <b>CUMULATIVE BUDGET GAP</b>                    | <b>£9.585</b>    | <b>£7.230</b>   | <b>£17.508</b>  |                  |

### 5.3 Workforce Savings Programme

- 5.3.1 The Council recognises that savings of the scale required cannot be achieved solely through non-pay expenditure reductions and more efficient ways of working will enable the council to deliver services more effectively and support an overall reduction in the workforce. Work is therefore ongoing to identify digitally led transformation opportunities and new models of service delivery. The Council has launched an exercise to gauge the level of interest in a Voluntary Exit Scheme (VES) as part of its wider savings programme and in an effort to avoid compulsory redundancy. Applications have now closed and, subject to approval of Cabinet, will be progressed following an assessment of service need, affordability and organisational resilience. The outcome of the VES scheme will be included in the Final Budget Report in February 2027.
- 5.3.2 Alongside the VES, the Council is progressing a range of workforce measures including deletion of vacant posts, review of funding arrangements, organisational redesign and service restructuring. Current MTFS assumptions include recurring workforce savings of £5.480m through vacancy deletion and related measures which at present do not require compulsory redundancy measures. This represents a relatively prudent target of c5% of the Council's gross staffing budget. However, the Council will continue to explore opportunities to surpass this target.
- 5.3.3 Subject to the approval, we also intend to commence consultation with the residents of the Borough on the future form and function of the School Crossing Patrol and Youth Services, which may have an associated impact on these two groups of staff (depending on the outcome of the consultation). For forecasting purposes, savings of £0.332m have been aligned to these consultations. See Appendix 2.
- 5.3.4 In view of the scale of the remaining budget challenge, the Council will continue to analyse opportunities for further workforce efficiencies between publication of this Draft Budget Report and the Final Budget Report in February 2027. Whilst every effort will be made to delivery change consensually through voluntary exits, redeployment, vacancy management and other mitigating actions, the Council cannot rule out the possibility of compulsory redundancies being required. The

Trades Unions will be fully consulted on all proposals, and the relevant policies will be applied.

- 5.3.5 The financial implications of the Voluntary Exit Scheme and a future Compulsory Redundancy scheme (if required), including both recurring savings and one-off severance costs, will be assessed following completion of the ongoing workforce analysis and reflected in the Final Budget Report. Any one-off severance costs arising from the delivery of the savings programme will need be funded through available capital receipt flexibilities given the council's level of reserves or, if required, through a capitalisation direction request.

## **6. 2027/28 Budget and 2028-30 MTFS Position**

### **6.1 Budget Summary**

- 6.1.1 The preceding sections of this report have outlined the key changes to expenditure assumptions, funding forecasts and savings proposals that have informed the development of the 2027/28 Draft Budget and updated MTFS.
- 6.1.2 Since the approval of the February 2026 budget, the Council has undertaken a comprehensive review of its budget assumptions. Whilst there have been some improved assumptions, these have been more than offset by continued growth in service demand, increasing care costs and treasury management pressures.
- 6.1.3 The net impact of these assumption changes is an increase in budget pressures of £6.161m in 2027/28. In response, the Council has developed a significant number of savings proposals totalling £10.747m for 2027/28, reducing the forecast budget gap from £13.898m reported in February 2026 to £9.585m.
- 6.1.4 Whilst the savings programme has significantly reduced the scale of the financial challenge, it has not been sufficient to eliminate the budget gap. This reflects the scale of the underlying cost and demand pressures facing the Council, particularly within statutory social care services, together with ongoing pressures arising from inflation and the Council's capital financing requirements.
- 6.1.5 Looking beyond 2027/28, the medium-term position remains highly challenging. Whilst a temporary surplus of £2.355m is forecast in 2028/29, significant additional expenditure growth is forecast in 2029/30. As a result, the cumulative budget gap is projected to increase to £17.508m by 2029/30, and further work will be required to identify sustainable solutions over the life of the MTFS.
- 6.1.6 The table below provides a summary of the key movements since the February 2026 budget and the resulting forecast budget gap position as at October 2026.

| <b>Table 8:</b>                               | <b>Oct-26</b>         |                       |                       |
|-----------------------------------------------|-----------------------|-----------------------|-----------------------|
|                                               | <b>2027/28<br/>£m</b> | <b>2028/29<br/>£m</b> | <b>2029/30<br/>£m</b> |
| <b>2027/28 - 2029/30 Draft Budget Summary</b> |                       |                       |                       |

|                                                     |                 |                  |                 |
|-----------------------------------------------------|-----------------|------------------|-----------------|
| <b>BUDGET GAP [FEBRUARY 2026]</b>                   | <b>£13.898</b>  | <b>£7.257</b>    | <b>£0.000</b>   |
| <b>Net Budget:</b>                                  |                 |                  |                 |
| Budget Assumption Movements                         | £6.161          | (£4.352)         | £16.970         |
| New Budget Proposals                                | (£10.747)       | (£6.172)         | (£0.533)        |
| <b>TOTAL NET BUDGET MOVEMENTS</b>                   | <b>(£4.585)</b> | <b>(£10.523)</b> | <b>£16.437</b>  |
| <b>Assumed Funding:</b>                             |                 |                  |                 |
| Funding Movements                                   | £0.273          | £0.911           | (£6.159)        |
| <b>TOTAL ASSUMED FUNDING MOVEMENTS</b>              | <b>£0.273</b>   | <b>£0.911</b>    | <b>(£6.159)</b> |
|                                                     |                 |                  |                 |
| <b>ANNUAL INCREMENTAL BUDGET GAP [OCTOBER 2026]</b> | <b>£9.585</b>   | <b>(£2.355)</b>  | <b>£10.278</b>  |
| <b>CUMULATIVE BUDGET GAP [OCTOBER 2026]</b>         | <b>£9.585</b>   | <b>£7.230</b>    | <b>£17.508</b>  |

## 6.2 Net Revenue Budget

- 6.2.1 Based on the current budget assumptions, draft savings proposals and funding forecasts, the Council's net revenue budget is projected to increase from £252.135m in 2026/27 to £264.520m in 2027/28, an increase of £12.385m (4.91%).

| <b>Table 9:</b><br><b>2027/28 - 2029/30 MTFS Summary</b> | <b>Oct-26</b>         |                       |                       |
|----------------------------------------------------------|-----------------------|-----------------------|-----------------------|
|                                                          | <b>2027/28<br/>£m</b> | <b>2028/29<br/>£m</b> | <b>2029/30<br/>£m</b> |
| <b>Directorate:</b>                                      |                       |                       |                       |
| Health & Adult Care                                      | £103.992              | £110.285              | £119.421              |
| Children & Young People                                  | £68.623               | £69.754               | £72.857               |
| Corporate Core                                           | £28.130               | £27.008               | £27.991               |
| Non-Service Specific                                     | £52.451               | £54.163               | £56.566               |
| Place                                                    | £11.404               | £11.487               | £12.299               |
| Housing General Fund                                     | (£0.080)              | (£0.080)              | (£0.080)              |
| <b>NET BUDGET</b>                                        | <b>£264.520</b>       | <b>£272.619</b>       | <b>£289.056</b>       |
| <b>Assumed Funding:</b>                                  |                       |                       |                       |
| Council Tax                                              | (£131.135)            | (£137.816)            | (£144.838)            |
| Business Rates                                           | (£120.022)            | (£124.440)            | (£126.710)            |
| Government Funding Grants                                | (£3.778)              | (£3.133)              | -                     |
| <b>ASSUMED FUNDING</b>                                   | <b>(£254.935)</b>     | <b>(£265.389)</b>     | <b>(£271.548)</b>     |
|                                                          |                       |                       |                       |
| <b>ANNUAL INCREMENTAL BUDGET GAP</b>                     | <b>£9.585</b>         | <b>(£2.355)</b>       | <b>£10.278</b>        |
| <b>CUMULATIVE BUDGET GAP</b>                             | <b>£9.585</b>         | <b>£7.230</b>         | <b>£17.508</b>        |

- 6.2.2 Health and Adult Care and Children and Young People continue to account for the largest proportion of Council expenditure. Together, these services represent

£172.615m of the proposed 2027/28 net budget, approximately 65% of total expenditure, reflecting sustained demand growth, increasing complexity of need and ongoing market cost pressures across social care services. Some of the centrally held budget contingencies and provisions will subsequently be allocated to these service areas once confirmed and lead to an increase in the proportion of the budget funding social care.

- 6.2.3 Based on the current budget assumptions, saving proposals and funding forecasts, the Council's net revenue budget is projected to increase by £12.385m (4.91%), from £252.135m in 2026/27 to £264.520m in 2027/28. Whilst savings proposals totalling £10.747m have partially mitigated the impact of demand growth, inflation and other cost pressures, budget pressures continue to increase at a faster rate than available resources.
- 6.2.4 Consequently, a residual budget gap of £9.585m remains in 2027/28, rising to a cumulative gap of £17.508m by 2029/30. The scale of the remaining challenge demonstrates that, notwithstanding the significant work undertaken to review assumptions and develop savings proposals, further measures will be required before a balanced and sustainable medium-term financial position can be achieved. The Council will therefore continue to identify additional opportunities through service transformation, efficiencies and demand management as part of the budget-setting process.

## **7. Risk, Sensitivity and Reserves**

### **7.1 Budget Robustness & Key Risks**

- 7.1.1 Legislation requires that annually the Council sets a balanced and robust budget, which is sufficient to meet its legal obligations, and then its aspirations. This requires all plans to be costed, forecasts and estimates to be checked for reasonableness, and risks to be assessed across the many varied services the Council provides. This also includes an assessment for emergencies, severe weather and other service and strategic risks.
- 7.1.2 Whilst every effort has been made to ensure that the budget is based on prudent and realistic assumptions, significant uncertainty remains within demand-led services. Consequently, actual expenditure and income may vary from the estimates contained within this report.
- 7.1.3 The Director of Finance, in consultation with the Executive Team, will continue to review the robustness of the budget and Medium-Term Financial Strategy before the Final Budget Report is presented to Council in February 2027. Particular attention will be given to the deliverability of savings proposals, the adequacy of reserves and emerging risks that may impact upon the Council's ability to maintain a balanced budget.
- 7.1.4 The Council faces various financial risks including:
- Social care demand
  - The ability to deliver savings at agreed values and within agreed timescales
  - Fees and charges income differing to assumptions.

- Demographic pressures
- Inflation and interest rates differing to assumptions.
- Business Rates: potential costs of backdated appeals.
- Variations to external levies & contracts.
- Future changes to legislation.
- Schools academisations deficits.
- The significant financial challenge currently being faced by the NHS locally.

## 7.2 Sensitivity Analysis

7.2.1 Whilst the budget has been prepared using the best information available at the time of drafting, a number of assumptions remain subject to uncertainty. Small variations in key assumptions relating to funding, pay, demand and capital financing costs can have a material impact on the Council's financial position. The table below illustrates the estimated full-year impact of a 1% movement in the most significant budget assumptions.

| <b>Table 10: Sensitivity Analysis</b>             | <b>Estimated Full Year Impact of 1% Movement<br/>£m</b> |
|---------------------------------------------------|---------------------------------------------------------|
| Council Tax (level, taxbase and collection rates) | +/- £1.311                                              |
| Pay Award                                         | +/- £1.055                                              |
| Real Living Wage                                  | +/- £0.833                                              |
| Children's: inflation and demand growth           | +/- £0.793                                              |
| Treasury & Capital Financing Costs                | +/- £1.169                                              |

7.2.2 The sensitivity analysis demonstrates that relatively small changes in key assumptions could have a material impact on the Council's financial position. Council Tax, pay awards, Real Living Wage increases and treasury management assumptions each have the potential to create financial pressures of around £1m. Given the scale of the remaining budget gap, careful monitoring of these assumptions will remain essential throughout the budget-setting process and the 2027/28 financial year.

## 7.3 Reserve Strategy

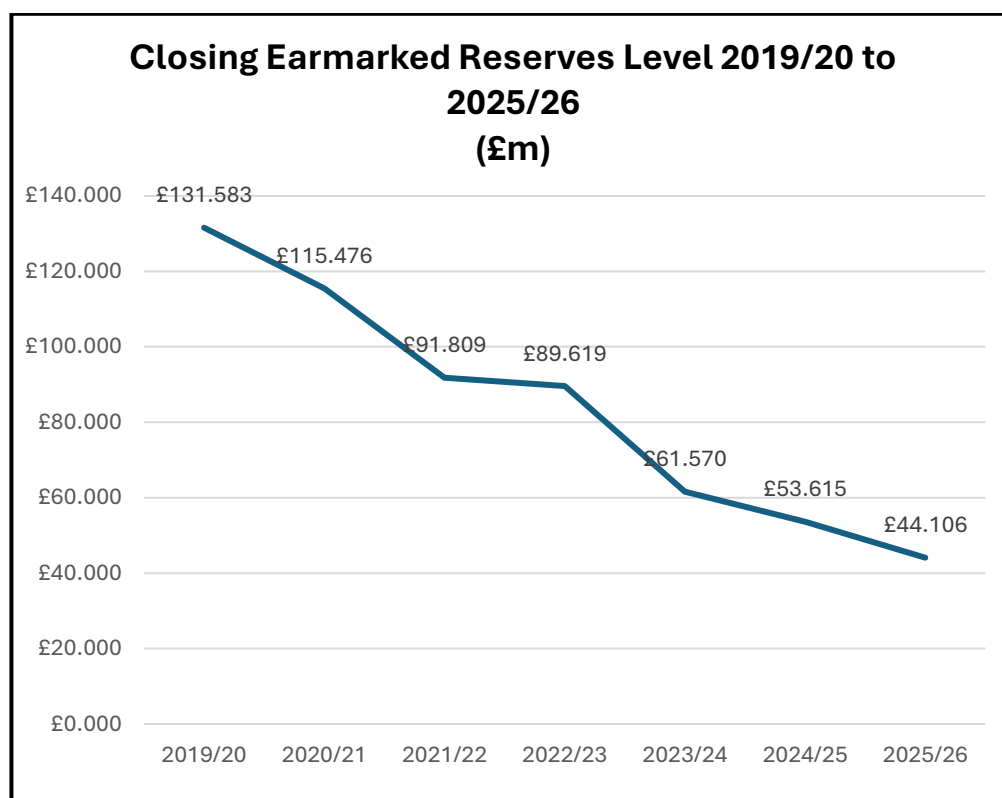
7.3.1 In accordance with statutory regulations and CIPFA guidance, the levels of balances and reserves are reviewed as part of the budget process to ensure they remain sufficient and sustainable over the medium term. Demand volatility, inflationary pressures and care market costs continue to reinforce the importance of maintaining adequate reserves to absorb unforeseen financial shocks and support the Council's overall financial resilience.

7.3.2 The Council's approach is that reserves should only be used on a temporary basis to support budget sustainability whilst recurring savings are implemented. Reserves should not be used as a substitute for sustainable funding or recurring budget reductions. The long-term objective is to maintain reserves at a level sufficient to manage the Council's financial risks.

- 7.3.3 The Council has historically utilised reserves to support the delivery of balanced budgets whilst savings programmes are implemented. For 2026/27, the approved budget included planned use of reserves of £3.977m. Whilst the use of earmarked reserves may be appropriate as a short-term measure, it is not prudent to rely upon reserve balances to fund ongoing expenditure pressures on a recurring basis.
- 7.3.4 Earmarked reserves are primarily held to manage financial risks, support significant change programmes, meet future commitments and provide resilience against unforeseen events. Maintaining an appropriate level of reserves is therefore a key component of the Council's overall financial strategy.
- 7.3.5 The Section 151 Officer will undertake a detailed review of reserve adequacy and robustness as part of the Final Budget Report in February 2027, having regard to financial risks and the Council's overall financial resilience

**7.4 Historic use of Reserves**

- 7.4.1 The council has historically relied upon the use of reserves to support the delivery of balanced budgets and to mitigate in-year financial pressures. The graph below summarises the utilisation of reserves over the last six financial years and demonstrates the extent to which reserves have been used to support the Council's financial sustainability. Earmarked reserves reduced from £131.583m at 31 March 2020 to £44.106m at 31 March 2026, a reduction of £87.477m (66%).
- 7.4.2 Whilst reserves have enabled the Council to manage exceptional financial challenges over recent years, the scale of the reduction demonstrates that reserve balances are being depleted at a significantly faster rate than they can be replenished. This trend is not sustainable over the medium term and reinforces the importance of addressing the Council's underlying structural budget deficit through recurring savings



## 7.5 Reserve Balances and Forecast Balances

7.5.1 The table below summarises the Council's Usable Reserve balances at 31 March 2026 together with the forecast position at 31 March 2027. A detailed review of reserve requirements and forecast balances across the Medium-Term Financial Strategy period will be undertaken as part of the Final Budget Report in February 2027.

| <b>Table 11:<br/>USABLE RESERVES</b>                | <b>Balance at 31<br/>March 2026<br/>£m</b> | <b>Forecast<br/>Balance at 31<br/>March 2027<br/>£m</b> |
|-----------------------------------------------------|--------------------------------------------|---------------------------------------------------------|
| General Fund                                        | (£10.000)                                  | (£10.000)                                               |
| Directorate Reserves                                | (£2.517)                                   | (£2.058)                                                |
| Investment Reserves                                 | (£2.813)                                   | (£2.228)                                                |
| Risk Reserves                                       | (£5.985)                                   | (£5.985)                                                |
| Budget Stabilisation and Funding Smoothing Reserves | (£17.141)                                  | (£7.519)                                                |
| External Funding                                    | (£5.650)                                   | (£4.269)                                                |
| <b>Earmarked Reserves</b>                           | <b>(£44.106)</b>                           | <b>(£32.059)</b>                                        |
| Schools Reserves                                    | (£2.972)                                   | (£2.972)                                                |
| <b>Total Usable Reserves</b>                        | <b>(£47.078)</b>                           | <b>(£35.031)</b>                                        |

7.5.2 Total Usable Reserves are forecast to reduce from £47.078m at 31 March 2026 to £35.031m at 31 March 2027, a reduction of £12.047m (25.6%). This reduction primarily reflects the approved use of reserves to support the 2026/27 budget

together with the utilisation of reserves that would be required if the forecast Quarter 1 overspend crystallises as the final outturn position.

- 7.5.3 The Budget Stabilisation Reserve remains the Council's primary reserve available to support financial sustainability. The reserve is forecast to reduce from £15.599m at 31 March 2026 to £5.977m at 31 March 2027 following the approved use of £3.977m to support the 2026/27 budget, a transfer from obsolete reserve of (£0.046m) and a further forecast contribution of £5.691m to offset the Quarter 1 forecast overspend. Consequently, the Council no longer has a sufficient Budget Stabilisation Reserve to fund the current budget gaps and therefore cannot rely upon reserves as a viable means of balancing future budgets.

| <b>Table 12:<br/>Budget Stabilisation Reserve</b>                                            | <b>2026/27<br/>£m</b> |
|----------------------------------------------------------------------------------------------|-----------------------|
| <b>Opening Balance at 1 April 2027</b>                                                       | <b>(£15.599)</b>      |
| Approved use of reserve to support the 2026/27 Budget (Feb 26 Council)                       | £3.977                |
| Internal transfer from obsolete reserve                                                      | (£0.046)              |
| Forecast contribution from the reserve to mitigate the 2026/27 Quarter 1 projected overspend | £5.691                |
| <b>Forecast closing balance at 31 March 2027</b>                                             | <b>(£5.977)</b>       |

- 7.5.4 Whilst reserves continue to provide short-term financial flexibility, the forecast reduction in reserve balances demonstrates the limited capacity available to support future budget pressures. The remaining Budget Stabilisation Reserve balance of £5.977m would be insufficient to address the current forecast 2027/28 budget gap of £9.585m in full.

- 7.5.5 Consequently, the Council cannot rely upon reserves as a sustainable solution to its financial challenges. It is therefore essential that further recurring savings, efficiencies and income generation opportunities are identified and delivered to address the underlying structural budget gap and maintain financial sustainability over the medium term.

## 7.6 Conclusion

- 7.6.1 The Council has undertaken a comprehensive assessment of the risks and uncertainties associated with the Draft Budget and Medium-Term Financial Strategy. Whilst the proposed budget has been prepared using prudent assumptions, significant risks remain, particularly in relation to social care demand, inflation and treasury management.

- 7.6.2 Reserves Continue to provide an important safeguard against unforeseen events and short-term financial pressures. However, reserve balances have reduced significantly in recent years and are forecast to reduce further during 2026/27. The Council's financial resilience is therefore becoming increasingly dependent upon the successful delivery of a balanced in-year position, savings proposals and the achievement of sustainable budget reductions.

- 7.6.3 Notwithstanding savings proposals totalling £10.747m, a budget gap of £9.585m remains in 2027/28, increasing to a cumulative gap of £17.508m by 2029/30. This demonstrates the scale of the financial challenge facing the Council and highlights the need for further savings, transformation activity and service redesign before a financially sustainable position can be achieved.

## **8. Exceptional Financial Support**

### **8.1 Exceptional Financial Support (EFS) Framework**

- 8.1.1 The Council has undertaken a range of actions in recent years aimed at addressing its financial challenges, including a Zero-Based Budgeting review and a detailed service challenge process covering all of the council's services, external reviews of Health and Adult Social Care and Children's Services regarding the scope for additional savings, and the implementation of workforce reduction measures.
- 8.1.2 These actions form part of a significant savings programme totalling £27.251m. Notwithstanding these measures, a forecast budget gap of £9.585m remains for 2027/28. This exceeds the forecast level of available Budget Stabilisation Reserve after the planned use of £3.977m in 2026/27 and the 2026/27 Quarter 1 forecast overspend of £5.691m.
- 8.1.3 The Exceptional Financial Support (EFS) framework enables local authorities experiencing significant financial pressures to seek support from the Ministry of Housing, Communities and Local Government (MHCLG) where locally available measures alone are insufficient to achieve a sustainable balanced budget. Support is considered on a case-by-case basis and is intended to be a measure of last resort. There is a clear expectation that authorities will exhaust all reasonable local options to address financial challenges before seeking support through the framework.
- 8.1.4 Where agreed, EFS is typically provided through a capitalisation direction, enabling an authority to finance eligible revenue costs using capital resources, including capital receipts or borrowing. Whilst this can provide short-term financial flexibility, any borrowing undertaken would result in ongoing financing costs that must be accounted for in future revenue budgets.
- 8.1.5 The EFS framework also allows for authorities to request additional council tax flexibility which would allow increases above those imposed by referendum limits. The request would include the amount of additional flexibility required and any measures to be taken to protect taxpayers on low incomes through hardship schemes.
- 8.1.6 The number of authorities requiring EFS has increased significantly in recent years with 36 councils requesting EFS support to set a budget in 2026/27 which is over 11% of all councils in England with the number forecast to increase significantly for 2027/28, reflecting the continuing financial challenges facing local government. Like many local authorities, the Council continues to face significant demand-led pressures, particularly within Adults' and Children's Services. The need for an increasing number of councils to currently, and potentially in the future, require

EFS means it has become increasingly mainstreamed, and reflective of the national financial challenges affecting the sector.

- 8.1.7 In September 2026, MHCLG announced that 14 councils already in receipt of EFS will benefit from a share of £91m of additional grant funding. The funding is intended to support investment in transformation and modernisation programmes helping authorities achieve longer-term financial sustainability and reduce reliance on ongoing exceptional support. MHCLG has stated that the outcomes from these authorities will be used to identify effective approaches and inform the future targeting of support towards services that are most important to local communities. Whilst no commitment has been made regarding the continuation of this specific funding, the Council will continue to monitor opportunities for similar support and seek to maximise any available external grant funding that could assist its financial sustainability and transformation objectives.
- 8.1.8 The Government has provided a three-year local government finance settlement covering the period 2026/27 to 2028/29. Whilst future annual allocations remain subject to confirmation, the overall funding framework provides greater certainty and indicates that there is limited prospect of material increases in the national funding envelope during this period.
- 8.1.9 Whilst the Council continues to identify further opportunities to reduce the budget gap, the Director of Finance considers it prudent to commence exploratory discussions with MHCLG, given the Council's current financial position. This would not constitute a formal application for support, but early engagement with MHCLG would allow sufficient time to understand the requirements of the framework and should circumstances warrant, submit a formal request for EFS and seek a conditional offer of support prior to the Council setting its 2027/28 budget.
- 8.1.10 As additional prudential borrowing would increase the budget gap due to interest costs, the preferred approach would be to utilise capital receipts or increase council tax to cover any budget gap that still remains at budget setting in February. To that end the Council has previously adopted a programme-based approach to property disposals through the Accelerated Land and Property Disposal Programme (ALDP) which was approved by Cabinet and work is being undertaken by officers to refresh and expand the disposal pipeline through the council's internal governance arrangements to identify the level of additional capital receipts which can be generated over the MTFS timeline, and the position will be updated in the final budget report. All disposals will be undertaken in accordance with the Council's governance procedures and our duty to secure best value.

## **9. Budget Consultation, Timeline & Workplan**

### **9.1. Budget Consultation**

- 9.1.1. Cabinet is requested to approve consultation on the draft budget assumptions and proposals set out in this report. Consultation will take place between 19 October and 30 November and will seek views from residents, businesses, staff, voluntary and community sector organisations and partner agencies.

9.1.2. The consultation will focus on the proposed Council Tax increase; budget-setting principles, proposed savings and efficiencies; proposed changes to fees and charges and any proposals that may have a significant impact on services.

9.1.3. Feedback received will be reviewed and reported to Cabinet and Council before a final decision is taken on the 2027/28 budget. Equality impact assessments will be undertaken where required and will inform the final recommendations.

## 9.2. Timelines

9.2.1. The current timelines for the 2027/28 Budget Report are shown in the table below:

| <b>Table 13:</b>            |                                      |                  |
|-----------------------------|--------------------------------------|------------------|
| <b>Report</b>               | <b>Activity</b>                      | <b>Date</b>      |
| 2027/28 Draft Budget Report | Budget Overview & Scrutiny Committee | 13 October 2026  |
|                             | Budget Cabinet                       | 14 October 2026  |
| Budget consultation         | Budget Consultation launch           | 19 October 2026  |
|                             | Budget Consultation ends             | 30 November 2026 |
| 2027/28 Final Budget Report | Budget Overview & Scrutiny Committee | 9 February 2027  |
|                             | Budget Cabinet                       | 10 February 2027 |
|                             | Budget Council                       | 24 February 2027 |

## 9.3. Future Workplan

9.3.1. The Council's aim between now and February is to reduce the current £9.585m 2027/28 budget gap through further saving proposals, including significant workforce reductions. The Council has started this work and will report to a future Cabinet meeting for inclusion in the 2027/28 budget to be considered by Council in February. This next phase of budget work is framed primarily over the three themes of:

### 1) Internal Transformation including workforce reductions:

This includes the development of a workforce and digital strategy including looking at the scope for becoming more cost-effective and efficient in our service delivery models including opportunities for automation and process improvement with a good example being the transformation work linked to the upgrade of Unit 4. This will underpin and support the ongoing work on service reviews and the right sizing of staffing budgets.

### 2) Contain Growth / Demand Pressures:

A significant proportion of the forecast funding gap is the result of ongoing increasing demand, particularly Children's and Adults Social Care. Whilst these are national issues and pressures not unique to Bury, investment in commissioning expertise is required in order to reduce Children's demand and the cost of meeting that demand.

### **3) Income:**

This includes ensuring that all current sales, fees and charges are reviewed to ensure they cover the full cost of service delivery, and new avenues of income generation are fully explored.

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**Links** with the Corporate Priorities:

Links with the LET'S Do It! Strategy are set out above.

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

A full EIA will be provided on finalised budget proposals being submitted to Cabinet.

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

A full impact assessment will be completed on finalised budget proposals being submitted to Cabinet.

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

As set out in the body of the report.

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### **Legal Implications:**

This report provides members with details of budget proposals.

The report outlines the steps needed to progress with the Council's budget setting process. It is proposed that consultation takes place with the public in relation to the budget proposals between 19<sup>th</sup> October and 30<sup>th</sup> November. This consultation will inform the finalised budget proposals.

The Council must consult where there are specific legislative requirements or where the public would legitimately expect the Council to do so. All consultation must take place at an early stage and must abide by the principles of good consultation. The outcomes from the consultation will be reviewed and brought to Cabinet and Overview and Scrutiny for consideration prior to being considered by Cabinet and Council. As part of the budget setting process workforce consultation will take place in relation to these proposals. In addition to the specific legislative requirements which will be specific to the proposal the Equality Act 2010 states that public bodies must have "due regard" to a variety of equalities objectives under the Equality Act 2010. In order to ensure we have given due regard we need to demonstrate that we understand how decisions or policies can affect those with

protected characteristics and whether they will be disproportionately affected. Consulting is therefore an important part of meeting the equality duty.

In setting the budget the Council has a duty to ensure:

- It continues to meet its statutory duties
- Governance processes are robust and support effective decision making
- Its Medium-Term Financial Strategy reflects the significant challenges being faced and remains responsive to the uncertainties in the economy by continuing to deliver against its savings targets
- Its savings plans are clearly communicated and linked to specific policy decisions, with the impact on service provision clearly articulated
- It has the appropriate levels of reserves and that it closely monitors its liquidity to underpin its financial resilience
- It continues to provide support to members and officers responsible for managing budgets
- It prepares its annual statement of accounts in an accurate and timely manner in exercising its fiduciary duty, the Council should be satisfied that the proposals put forward are a prudent use of the Authority's resources in both the short and long term; that the proposals strike a fair balance between the interests of Council taxpayers and ratepayers on the one hand and the community's interests in adequate and efficient services on the other; and that they are acting in good faith for the benefit of the community whilst complying with all statutory duties.

Section 28 of the Local Government Act 2003 also imposes a statutory duty on the Council to monitor during the financial year its expenditure and income against the budget calculations. If the monitoring establishes that the budgetary situation has deteriorated, the Council must take such action as it considers necessary to deal with the situation. This might include, for instance, action to reduce spending in the rest of the year, or to increase income, or to finance the shortfall from reserves.

This report seeks cabinet approval for Officers to explore Exceptional Financial Support with MHCLG, the s 151 officer has advised that this is a reasonable action in order to prepare a lawful and balanced budget for consideration by Council in February 2027. The request is made now to provide time to address this whilst parallel work is undertaken to address the deficit through sustainable funding, transformation savings, demand management whilst preserving reserve levels.

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**Financial Implications:**

The financial implications are as outlined in the report

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**Appendices:**

All appendices are included within the report

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**Background papers:**

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

The Council's 2026/27 Revenue Budget and Medium-Term Financial Strategy (MTFS) for 2027/28 through to 2028/29 - [Final Budget Report - Feb 26](#)

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

| Term  | Meaning                                               |
|-------|-------------------------------------------------------|
| CC    | Corporate Core                                        |
| CIPFA | Chartered Institute of Public Finance and Accountancy |
| CSP   | Core Spending Power                                   |
| CTB   | Council Tax Base                                      |
| CYP   | Children and Young People                             |
| EFS   | Exceptional Financial Support                         |
| EIA   | Equality Impact Assessment                            |
| EV    | Electric Vehicle                                      |
| FFR   | Fair Funding Review                                   |
| GF    | General Fund                                          |
| GM    | Greater Manchester                                    |
| GMCA  | Greater Manchester Combined Authority                 |
| HAC   | Health and Adult Care                                 |
| HRA   | Housing Revenue Account                               |
| ICT   | Information and Communications Technology             |
| LGA   | Local Government Association                          |
| LGFS  | Local Government Finance Settlement                   |
| MHCLG | Ministry of Housing, Communities and Local Government |
| MTFS  | Medium-Term Financial Strategy                        |
| NSS   | Non-Service Specific                                  |
| PLA   | Place Directorate                                     |
| SEND  | Special Educational Needs and Disabilities            |
| VES   | Voluntary Exit Scheme                                 |

## APPENDIX 1

| APPENDIX 1:                                                                                                    |      | Previously Agreed (PA) / New Saving | Oct-26          |                 |                 |                 |
|----------------------------------------------------------------------------------------------------------------|------|-------------------------------------|-----------------|-----------------|-----------------|-----------------|
| 2027/28 - 2029/30 Savings                                                                                      | Dept |                                     | 2027/28 £m      | 2028/29 £m      | 2029/30 £m      | TOTAL £m        |
| Adults Commissioning Review                                                                                    | HAC  | PA                                  | (£1.000)        |                 |                 | (£1.000)        |
| Single Handed Care Trial                                                                                       | HAC  | PA                                  | (£0.200)        |                 |                 | (£0.200)        |
| Persona - Employability, Elton Review & Supported Living                                                       | HAC  | PA                                  | (£0.340)        | (£0.100)        |                 | (£0.440)        |
| Impower Review Efficiencies                                                                                    | HAC  | PA                                  | (£1.667)        | (£1.667)        |                 | (£3.334)        |
| Leisure Service Commercial Growth and Subsidy reduction                                                        | HAC  | PA                                  | (£0.155)        | (£0.220)        |                 | (£0.375)        |
| <b>HAC PA Savings Subtotal</b>                                                                                 |      |                                     | <b>(£3.362)</b> | <b>(£1.987)</b> | <b>-</b>        | <b>(£5.349)</b> |
| Adults Commissioning Review for Younger Adults and Hospital discharges                                         | HAC  | NEW                                 | (£0.625)        | (£0.550)        |                 | (£1.175)        |
| Review of non-discretionary budgets linked to training and non-staffing spend                                  | HAC  | NEW                                 | (£0.140)        |                 |                 | (£0.140)        |
| Review of Income Efficiencies                                                                                  | HAC  | NEW                                 | (£0.350)        |                 |                 | (£0.350)        |
| Direct Payment Clawback Policy Review                                                                          | HAC  | NEW                                 | (£0.365)        |                 |                 | (£0.365)        |
| Removal of Homecare Charging Cap                                                                               | HAC  | NEW                                 | (£0.350)        | (£0.350)        |                 | (£0.700)        |
| Public Health contract efficiencies                                                                            | HAC  | NEW                                 | (£0.168)        |                 |                 | (£0.168)        |
| Public Health contributions to wider LA services efficiencies                                                  | HAC  | NEW                                 | (£0.060)        |                 |                 | (£0.060)        |
| Review of discretionary payments to external organisations (The Met, Fusiliers Museum, Citizens Advice Bureau) | HAC  | NEW                                 | (£0.097)        | (£0.057)        |                 | (£0.154)        |
| Income Maximisation for Leisure Services                                                                       | HAC  | NEW                                 | (£0.435)        | (£0.567)        |                 | (£1.002)        |
| Bury Art Museum commercialisation                                                                              | HAC  | NEW                                 |                 | (£0.051)        | (£0.051)        | (£0.102)        |
| Increase to grant income linked to additional bids and applications                                            | HAC  | NEW                                 | (£0.050)        |                 |                 | (£0.050)        |
| Vacancy deletions and funding changes to posts                                                                 | HAC  | New                                 | (£0.796)        |                 |                 | (£0.796)        |
| <b>HAC New Savings Subtotal</b>                                                                                |      |                                     | <b>(£3.436)</b> | <b>(£1.575)</b> | <b>(£0.051)</b> | <b>(£4.266)</b> |
| <b>Health and Adult Social Care Total</b>                                                                      |      |                                     | <b>(£6.798)</b> | <b>(£3.562)</b> | <b>(£0.051)</b> | <b>(£9.615)</b> |
| Victoria Family Centre delivery model review                                                                   | CYP  | PA                                  | (£0.050)        |                 |                 | (£0.050)        |
| Business Support Use of Magic Notes software                                                                   | CYP  | PA                                  | (£0.100)        |                 |                 | (£0.100)        |

| APPENDIX 1:                                                  |      | Previously Agreed (PA) / New Saving | Oct-26          |                 |                 |                 |
|--------------------------------------------------------------|------|-------------------------------------|-----------------|-----------------|-----------------|-----------------|
| 2027/28 - 2029/30 Savings                                    | Dept |                                     | 2027/28 £m      | 2028/29 £m      | 2029/30 £m      | TOTAL £m        |
| Complex Safeguarding Team - small restructure                | CYP  | PA                                  | (£0.015)        |                 |                 | (£0.015)        |
| <b>CYP PA Savings Subtotal</b>                               |      |                                     | <b>(£0.165)</b> | <b>-</b>        | <b>-</b>        | <b>(£0.165)</b> |
| CYP Premises                                                 | CYP  | New                                 |                 | (£0.050)        |                 | (£0.050)        |
| High-cost supported accommodation                            | CYP  | New                                 |                 | (£0.400)        | (£0.400)        | (£0.800)        |
| Post-18 - follow on accommodation                            | CYP  | New                                 | (£0.200)        | (£0.100)        |                 | (£0.300)        |
| CYP Placements                                               | CYP  | New                                 | (£0.600)        | (£1.400)        |                 | (£2.000)        |
| Education Psychology Locum Assessments                       | CYP  | New                                 | (£0.060)        |                 |                 | (£0.060)        |
| Special Educational Needs and Disabilities Service Equipment | CYP  | New                                 | (£0.030)        |                 |                 | (£0.030)        |
| Vacancy deletions and funding changes to posts               | CYP  | New                                 | (£0.621)        |                 |                 | (£0.621)        |
| School Crossing Patrols                                      | CYP  | New                                 | (£0.100)        | (£0.087)        |                 | (£0.187)        |
| Youth Services redesign                                      | CYP  | New                                 | (£0.145)        |                 |                 | (£0.145)        |
| <b>CYP New Savings Subtotal</b>                              |      |                                     | <b>(£1.756)</b> | <b>(£2.037)</b> | <b>(£0.400)</b> | <b>(£4.193)</b> |
| <b>Children's and Young People Total</b>                     |      |                                     | <b>(£1.921)</b> | <b>(£2.307)</b> | <b>(£0.400)</b> | <b>(£4.358)</b> |
| Contract Efficiencies                                        | S&T  | PA                                  | (£1.450)        | (£1.000)        |                 | (£2.450)        |
| ICT Digitalisation                                           | S&T  | PA                                  | (£0.163)        |                 |                 | (£0.163)        |
| <b>CC PA Savings Subtotal</b>                                |      |                                     | <b>(£1.613)</b> | <b>(£1.000)</b> | <b>-</b>        | <b>(£2.613)</b> |
| Old School House                                             | S&T  | New                                 | (£0.126)        | (£0.005)        | (£0.005)        | (£0.136)        |
| Silver Street / Humphrey House                               | S&T  | New                                 | (£0.161)        | (£0.014)        | (£0.014)        | (£0.189)        |
| Inclusive Supported Accommodation                            | S&T  | New                                 | (£0.054)        | (£0.003)        | (£0.003)        | (£0.060)        |
| Irwell Valley Temporary Accommodation                        | S&T  | New                                 | (£0.095)        | (£0.004)        | (£0.004)        | (£0.103)        |
| GMCA Lease & Repair                                          | S&T  | New                                 | (£0.160)        | (£0.006)        | (£0.006)        | (£0.172)        |
| Public Protections - Additional Income                       | S&T  | New                                 | (£0.210)        |                 |                 | (£0.210)        |
| Robotic Mailing Contract,                                    | S&T  | New                                 | (£0.196)        | (£0.362)        |                 | (£0.558)        |
| Legal - Registrars fees                                      | S&T  | New                                 | (£0.030)        |                 |                 | (£0.030)        |
| Legal fees                                                   | S&T  | New                                 | (£0.023)        |                 |                 | (£0.023)        |
| Legal - School Service Level Agreement appeals               | S&T  | New                                 | (£0.010)        |                 |                 | (£0.010)        |
| Adult Learning - 10% Reduction in General Fund Support       | S&T  | New                                 | (£0.030)        |                 |                 | (£0.030)        |
| Purchase / Virtual Cards efficiencies                        | S&T  | New                                 | (£0.300)        |                 |                 | (£0.300)        |
| Strengthened Counter Fraud approach                          | S&T  | New                                 | (£0.053)        |                 |                 | (£0.053)        |
| People & Inclusion - additional income - prices              | S&T  | New                                 | (£0.050)        |                 |                 | (£0.050)        |
| Vacancy deletions and funding changes to posts               | S&T  | New                                 | (£0.542)        | (£0.655)        |                 | (£1.197)        |

| APPENDIX 1:                                                                                   |      | Previously Agreed (PA) / New Saving | Oct-26     |            |            |          |
|-----------------------------------------------------------------------------------------------|------|-------------------------------------|------------|------------|------------|----------|
| 2027/28 - 2029/30 Savings                                                                     | Dept |                                     | 2027/28 £m | 2028/29 £m | 2029/30 £m | TOTAL £m |
| CC New Savings Subtotal                                                                       |      |                                     | (£2.040)   | (£1.049)   | (£0.032)   | (£3.121) |
| Corporate Core Total                                                                          |      |                                     | (£3.653)   | (£1.394)   | (£0.032)   | (£4.537) |
| Unit 4 Reimplementation & Transformation Review                                               | NSS  | PA                                  | (£0.350)   |            |            | (£0.350) |
| NSS PA Subtotal                                                                               |      |                                     | (£0.350)   | -          | -          | (£0.350) |
| Staffing reduction target                                                                     | NSS  | New                                 | (£1.713)   | (£0.649)   |            | (£2.361) |
| NSS New Savings Subtotal                                                                      |      |                                     | (£1.713)   | (£0.649)   | -          | (£2.361) |
| Non-Service Specific Total                                                                    |      |                                     | (£2.063)   | (£0.649)   | -          | (£2.711) |
| Car Park Tariff Review                                                                        | PLA  | PA                                  | (£0.062)   |            |            | (£0.062) |
| Light Reduction - Trim and Dim                                                                | PLA  | PA                                  | (£0.209)   |            |            | (£0.209) |
| District Parking and Enforcement                                                              | PLA  | PA                                  | (£0.285)   |            |            | (£0.285) |
| Moving vehicle offence income                                                                 | PLA  | PA                                  | (£0.110)   |            |            | (£0.110) |
| EV cross pavement fee                                                                         | PLA  | PA                                  | (£0.039)   |            |            | (£0.039) |
| Future Asset Plan                                                                             | PLA  | PA                                  | (£0.618)   |            |            | (£0.618) |
| Place PA Subtotal                                                                             |      |                                     | (£1.323)   | -          | -          | (£1.323) |
| Strategic Planning/Regen - Income generation                                                  | PLA  | New                                 | (£0.100)   |            |            | (£0.100) |
| Capital charge rates                                                                          | PLA  | New                                 | (£0.047)   |            |            | (£0.047) |
| Building Control fee increase                                                                 | PLA  | New                                 | (£0.060)   |            |            | (£0.060) |
| Development Mgmt. - fee income                                                                | PLA  | New                                 | (£0.030)   |            |            | (£0.030) |
| Rental income                                                                                 | PLA  | New                                 | (£0.017)   |            |            | (£0.017) |
| Property - maximisation of income through rent reviews and recognising existing income levels | PLA  | New                                 | (£0.290)   |            |            | (£0.290) |
| Catering - café at Radcliffe Hub                                                              | PLA  | New                                 | (£0.258)   |            |            | (£0.258) |
| Cleaning - new sites                                                                          | PLA  | New                                 |            | (£0.100)   |            | (£0.100) |
| Waste - Removal of missed collection route                                                    | PLA  | New                                 | (£0.075)   |            |            | (£0.075) |
| Waste – Outsource bulky waste and reduce agency costs                                         | PLA  | New                                 | (£0.050)   |            |            | (£0.050) |
| Waste - Review of missed bins policy - issue of excess waste bags                             | PLA  | New                                 | (£0.031)   |            |            | (£0.031) |
| Green Waste charging                                                                          | PLA  | New                                 |            | (£0.562)   | (£0.050)   | (£0.612) |
| Highways - Lane Rental income                                                                 | PLA  | New                                 | (£0.025)   |            |            | (£0.025) |
| Highways & Green Spaces - Income generation                                                   | PLA  | New                                 | (£0.050)   |            |            | (£0.050) |
| Street Lighting - Trim                                                                        | PLA  | New                                 | (£0.040)   |            |            | (£0.040) |
| Depot Streamlining                                                                            | PLA  | Ne/w                                | (£0.015)   |            |            | (£0.015) |
| Highways & Green Spaces - Fee income s38 & s278 applications                                  | PLA  | New                                 | (£0.020)   | (£0.200)   |            | (£0.220) |
| Highways & Green Spaces - Fees to capital                                                     | PLA  | New                                 | (£0.190)   |            |            | (£0.190) |

| APPENDIX 1:                                    |      | Previously Agreed (PA) / New Saving | Oct-26     |            |            |           |
|------------------------------------------------|------|-------------------------------------|------------|------------|------------|-----------|
| 2027/28 - 2029/30 Savings                      | Dept |                                     | 2027/28 £m | 2028/29 £m | 2029/30 £m | TOTAL £m  |
| Vacancy deletions and funding changes to posts | PLA  | New                                 | (£0.505)   |            |            | (£0.505)  |
| Place New Savings                              |      |                                     | (£1.803)   | (£0.862)   | (£0.050)   | (£2.715)  |
| Place Total                                    |      |                                     | (£3.126)   | (£0.862)   | (£0.050)   | (£4.038)  |
| TOTAL SAVINGS PROGRAMME                        |      |                                     | (£17.560)  | (£9.159)   | (£0.533)   | (£27.251) |
|                                                |      |                                     |            |            |            |           |
| Subtotal Previously Approved Savings           |      |                                     | (£6.813)   | (£2.987)   | -          | (£9.800)  |
| Subtotal New Savings                           |      |                                     | (£10.747)  | (£6.172)   | (£0.533)   | (£17.451) |
| TOTAL SAVINGS                                  |      |                                     | (£17.560)  | (£9.159)   | (£0.533)   | (£27.251) |

## APPENDIX 2

| APPENDIX 2:<br><br>2027/28- 2029/30 Policy Savings Summary | Oct-26          |                 |                 |                 |
|------------------------------------------------------------|-----------------|-----------------|-----------------|-----------------|
|                                                            | 2027/28<br>£m   | 2028/29<br>£m   | 2029/30<br>£m   | TOTAL<br>£m     |
| <b>Policy Savings Non-Staffing:</b>                        |                 |                 |                 |                 |
| Green Waste charging                                       | -               | (£0.562)        | (£0.050)        | (£0.612)        |
| Street Lighting Trim                                       | (£0.040)        |                 |                 | (£0.040)        |
| Removal of Homecare Charging Cap                           | (£0.350)        | (£0.350)        |                 | (£0.700)        |
| Income Maximisation for Leisure Services                   | (£0.435)        | (£0.567)        |                 | (£1.002)        |
| <b>Subtotal Policy Savings Non-Staffing</b>                | <b>(£0.825)</b> | <b>(£1.479)</b> | <b>(£0.050)</b> | <b>(£2.354)</b> |
| <b>Policy Savings Staffing:</b>                            |                 |                 |                 |                 |
| School Crossing Patrols                                    | (£0.100)        | (£0.087)        |                 | (£0.187)        |
| Youth Service redesign                                     | (£0.145)        |                 |                 | (£0.145)        |
| <b>Subtotal Policy Savings Staffing</b>                    | <b>(£0.245)</b> | <b>(£0.087)</b> | <b>-</b>        | <b>(£0.332)</b> |
| <b>TOTAL POLICY DECISION SAVINGS</b>                       | <b>(£1.070)</b> | <b>(£1.566)</b> | <b>(£0.050)</b> | <b>(£2.686)</b> |

## APPENDIX 3

| APPENDIX 3:<br><br>2027/28 Budget Estimates | Oct 26                    |                               |                      |                            |                |                            |                 |
|---------------------------------------------|---------------------------|-------------------------------|----------------------|----------------------------|----------------|----------------------------|-----------------|
|                                             | Health & Adult Care<br>£m | Children & Young People<br>£m | Corporate Core<br>£m | Non-Service Specific<br>£m | Place<br>£m    | Housing General Fund<br>£m | TOTAL<br>£m     |
| <b>2026/27 Net Budget b/fwd</b>             | <b>£100.477</b>           | <b>£66.386</b>                | <b>£29.939</b>       | <b>£41.637</b>             | <b>£13.775</b> | <b>(£0.080)</b>            | <b>£252.135</b> |
| <b>Budget Assumptions:</b>                  |                           |                               |                      |                            |                |                            |                 |
| Pay Award                                   | £0.820                    | £0.791                        | £0.897               | (£0.002)                   | £0.660         | -                          | £3.166          |
| Pay Base Movements                          | -                         | -                             | £0.447               | -                          | -              | -                          | £0.447          |
| Contractual Inflation                       | £1.714                    | £3.321                        | £0.070               | -                          | (£0.332)       | -                          | £4.773          |
| Real Living Wage                            | £5.075                    | £0.255                        | -                    | -                          | -              | -                          | £5.329          |
| General Inflation                           | -                         | -                             | -                    | -                          | (£0.016)       | -                          | (£0.016)        |
| Demand/Volume/Activity Base Movements       | £3.609                    | (£0.210)                      | £0.272               | £2.863                     | £0.530         | -                          | £7.064          |
| Grants, Contributions & Income Recovery     | -                         | -                             | £0.066               | £1.286                     | -              | -                          | £1.352          |
| Sales, Fees & Charges                       | (£0.904)                  | -                             | -                    | -                          | (£0.118)       | -                          | (£1.022)        |
| Recharges HRA, School, Capital & Internal   | -                         | -                             | £0.092               | -                          | £0.031         | -                          | £0.123          |
| Precepts & Levies                           | -                         | -                             | -                    | £2.295                     | -              | -                          | £2.295          |
| Treasury & Capital                          | -                         | -                             | -                    | £5.844                     | -              | -                          | £5.844          |
| Provisions & Contingency                    | -                         | -                             | -                    | £0.591                     | -              | -                          | £0.591          |
| <b>Total Budget Assumptions</b>             | <b>£10.313</b>            | <b>£4.157</b>                 | <b>£1.844</b>        | <b>£12.877</b>             | <b>£0.755</b>  | <b>-</b>                   | <b>£29.945</b>  |
| <b>Savings:</b>                             |                           |                               |                      |                            |                |                            |                 |
| Previously Approved Savings - Feb 26        | (£3.362)                  | (£0.165)                      | (£1.163)             | (£0.800)                   | (£1.323)       | -                          | (£6.813)        |
| New Savings – Oct 26                        | (£3.436)                  | (£1.756)                      | (£2.490)             | (£1.263)                   | (£1.802)       | -                          | (£10.747)       |

|                                      |                 |                 |                 |                 |                 |                 |                   |
|--------------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-------------------|
| <b>Total Savings</b>                 | <b>(£6.798)</b> | <b>(£1.921)</b> | <b>(£3.653)</b> | <b>(£2.063)</b> | <b>(£3.125)</b> | <b>-</b>        | <b>(£17.560)</b>  |
| <b>2027/28 NET BUDGET</b>            | <b>£103.992</b> | <b>£68.623</b>  | <b>£28.130</b>  | <b>£52.451</b>  | <b>£11.404</b>  | <b>(£0.080)</b> | <b>£264.520</b>   |
| <b>Assumed Funding:</b>              |                 |                 |                 |                 |                 |                 |                   |
| Council Tax                          |                 |                 |                 |                 |                 |                 | <b>(£131.135)</b> |
| Business Rates                       |                 |                 |                 |                 |                 |                 | <b>(£120.022)</b> |
| Government Funding Grants            |                 |                 |                 |                 |                 |                 | <b>(£3.778)</b>   |
| <b>ASSUMED FUNDING</b>               |                 |                 |                 |                 |                 |                 | <b>(£254.935)</b> |
|                                      |                 |                 |                 |                 |                 |                 |                   |
| <b>ANNUAL INCREMENTAL BUDGET GAP</b> |                 |                 |                 |                 |                 |                 | <b>£9.585</b>     |
| <b>CUMULATIVE BUDGET GAP</b>         |                 |                 |                 |                 |                 |                 | <b>£9.585</b>     |

## APPENDIX 4 - Consultation Savings

|                           |                   |
|---------------------------|-------------------|
| <b>Reference</b>          | Consult 01        |
| <b>Executive Director</b> | Will Blandamer    |
| <b>Cabinet Member</b>     | Cllr Tamoor Tariq |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                              |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
| <b>Service Area</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Health and Adult Social Care |
| <b>Budget Reduction Name</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Removal of Homecare Cap      |
| <b>Budget Reduction Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                              |
| <b>Budget Reduction Proposal</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                              |
| <p><b>Proposed Changes to Home Care Charges</b></p> <p>The Council has a legal responsibility under the <b>Care Act 2014</b> to assess people's care and support needs, determine what support is required, and ensure services are provided to those who are eligible.</p> <p>The Act also gives local authorities the power to charge for care and support services, provided that charges are fair, transparent and based on an individual's ability to pay following a financial assessment.</p> <p><b>Why are we proposing this change?</b></p> <p>Like councils across the country, we are facing significant and increasing demand for adult social care services. More people are living longer with complex care needs, while the cost of providing care continues to rise.</p> <p>The Council currently applies a maximum weekly charge (cap) of £533.87 per week for people receiving care and support in their own homes. This means that a small number of residents do not contribute the full cost of the care they receive, even where financial assessments show they have sufficient means to do so, or they have self declared that they have capital and assets above the capital threshold level and therefore should pay the full cost of their care</p> <p>We are proposing to remove this cap from the 1<sup>st</sup> April 2027 so that charges more closely reflect the cost of providing care, while continuing to ensure that nobody is asked to pay more than they can reasonably afford following a Care Act financial assessment.</p> <p>The Care Act charging framework already requires councils to consider a person's income, capital and disability-related expenditure, and to leave people with a protected level of income through the Minimum Income Guarantee, this will not change.</p> <p>A persons home is also excluded/disregarded from their assets when financially assessed for Homecare or other non-residential services.</p> <p><b>What this means for residents</b></p> <p>There are currently 38 people who have their contribution capped at the £533.87 per week homecare cap level. The average age of the people in receipt of homecare and benefit from the cap is 81 years old. The average increase for this cohort is c£380 per week.</p> |                              |

If the proposal is approved:

- People will continue to receive a care needs assessment and financial assessment.
- We will write to all 38 people and invite them to contact us for a full financial assessment.
- Charges will continue to be based on an individual's ability to pay.
- People on lower incomes or with limited savings will continue to receive financial support.
- The safeguards within the Care Act charging framework, including allowances for disability-related expenditure and the Minimum Income Guarantee, will remain in place.
- No one will be charged more than the cost of meeting their assessed care and support needs.
- People will still be able to self declare if they are above the capital threshold and do not wish to complete a financial assessment, and if so, charges will increase to the full cost of the care they receive.

### **Supporting fairness and sustainability**

The Council must balance its duty to support vulnerable residents with its responsibility to make best use of public funds. Removing the cap will help ensure a more equitable approach, whereby those who have greater financial means contribute a fairer amount towards the cost of their care.

This proposal is intended to bring charging arrangements more closely into line with the principles of the Care Act 2014, which provides a national framework for charging and financial assessment, while supporting the long-term sustainability of adult social care services.

### **Our commitment**

The Council remains committed to ensuring that no eligible resident is denied the care and support they need because of their financial circumstances.

| <b>MTFS</b>              | <b>2027/28</b> | <b>2028/29</b> | <b>2029/30</b> |
|--------------------------|----------------|----------------|----------------|
| Budget Reduction (£m)    | £0.350m        | £0.350m        |                |
| Staffing Reduction (FTE) |                |                |                |

|                           |                   |
|---------------------------|-------------------|
| <b>Reference</b>          | Consult 02        |
| <b>Executive Director</b> | Will Blandamer    |
| <b>Cabinet Member</b>     | Cllr Tamoor Tariq |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Service Area</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Health and Adult Social Care - Leisure                                                                                                                      |
| <b>Budget Reduction Name</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Income Maximisation for Leisure Services                                                                                                                    |
| <b>Budget Reduction Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Increase fees over the next few years to remove the Council subsidisation and bring charges more in line with other comparable Leisure options in the area. |
| <b>Budget Reduction Proposal</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                             |
| <p>This proposal is to address two elements of pressure within the Leisure service, which are increasing the Councils funding gap and challenging the financial sustainability of the Council. It also details the proposed mitigating action to further increase income across the leisure estate.</p> <p>The below covers -</p> <ol style="list-style-type: none"> <li>1. The ongoing net running costs of the leisure centre in Ramsbottom.</li> <li>2. The short-term pressure in the budget linked to the opening of the Radcliffe centre, as it will take time for income levels to be built up once the site opens.</li> <li>3. The proposal to increase fees across the services by an additional 10% (on top of existing plans for an annual 10% increase) resulting in a 20% increase in fees for years 2027/28 and 2028/29, returning to a 10% annual increase in 2029/30.</li> </ol> <p><b>1. <u>Ramsbottom</u></b></p> <p>Ramsbottom is a well-used and substantially utilised facility, with around 1,300 members, but it still operates at an estimated net cost to the Council of around £230k per year.</p> <p>In addition to this, remedial capital works are required at Ramsbottom, that are estimated to cost c£1m which equates to an additional £100k revenue cost per year to cover the cost of prudential borrowing, resulting in a total ongoing estimated net cost of £330k.</p> <p>The centre is valued and active, but financially unsustainable in its own right. Following an assessment of the market (see section on Impact on Fees and Charges) the preferred course of action is to retain the site but increase the charges for Leisure facilities across the estate, to cover the MTFS gap.</p> |                                                                                                                                                             |

## **2. 2026/27 Forecast and Radcliffe**

The forecast for the Leisure service in 2026/27 is an overspend position of £680k. This overspend is due to the opening of the Radcliffe centre in year, as costs to operate the service will be incurred in 2026/27 but it will take time to build up the income levels for the site.

### **Existing agreed MTFS savings**

There is also an existing MTFS approved saving for Leisure totalling £0.5m (approved as part of last years budget setting). This is to reduce the subsidy provided by the council through increased leisure income. This saving is profiled in the MTFS at £125k in 2026/27, a further £155k in 2027/28 and a further £220k in 2028/29.

In 2026/27 the rates charged to customers have increased by 10% resulting in additional income of c£270k in year. However, due to the short-term pressures linked to the Radcliffe centre this means that the current planned MTFS subsidy removal cannot be met.

## **3. Forecast Budget Requirement and Mitigation through Income generation**

Table 1 below details the current forecasted net budget requirement across the next 3 years for the Leisure service. This forecast assumes that membership numbers will grow by 2,500 across the coming years linked to Radcliffe opening and also assumes a 10% increase in customer charges per year, as agreed in last year's MTFS. This is the current forecast position before the additional 10% income proposal is adjusted for.

**Table 1**

|         | Total forecast budget requirement |
|---------|-----------------------------------|
| 2026/27 | £ 1,259,000                       |
| 2027/28 | £ 1,082,000                       |
| 2028/29 | £ 843,000                         |
| 2029/30 | £ 356,000                         |

The current MTFS subsidy reduction cannot be met, as it is unaffordable to retain Ramsbottom as a loss making site, and there are short-term Radcliffe budget pressure as income levels are built up. The proposed option to address these issues is to increase fees and charges across the leisure services to raise additional income and bridge the financial gap.

### **Risks and Estimates**

The modelling carried out for this proposal is based on a significant level of estimates, the further into the future we move the more prone to variation forecasts become. There are also many unknowns linked to the Radcliffe centre as the site is not yet open. Costs of utilities, income levels and running costs are all estimated, and will need to be monitored and refined as the site opens.

The MTFS will need to be updated annually to reflect either over or under delivery to this plan, as actual performance can then be factored into the future forecasts.

### **Impact on Fees/Charges**

It has previously been agreed in last year's MTFS that the service would increase the prices across our leisure sites by 10% per year from 2026/27 until 2028/29.

If we increase the prices by 20% per year for the next two years (additional 10%) this would incrementally increase the price of a membership from the current cost of £35.75 per month to £42.90 in 27/28, and to £51.48 Per Month in 2028/29. The 2029/30 rates would then go back to a 10% annual increase, resulting in a cost of £56.63 for 2029/30.

An increase in pricing does come with a risk of members leaving or moving elsewhere, however when comparing to other similar centres with Pools - Total Fitness Whitefield is £79 per month (no commitment), or £61 month (for 12 month commitment), Village gym is £91 per month, and at the other end of the spectrum PURE gym is £23 month (but has no swimming and is equipment only). These are the current 2026/27 rates, for those sites and will therefore also be likely to inflate annually.

### **MTFS Summary of Proposals**

The below table shows the current MTFS budget as agreed in last year's MTFS (Table 3)

**Table 3**

**Budget and MTFS working - Current Incremental**

|         | Total budget requirement | opening budget | Subsidy removal already in MTFS | Current MTFS Budget |
|---------|--------------------------|----------------|---------------------------------|---------------------|
|         |                          |                | -125,000                        |                     |
| 2027/28 | 1,082,000                | 743,800        | -155,000                        | 588,800             |
| 2028/29 | 843,000                  | 588,800        | -220,000                        | 368,800             |
| 2029/30 | 356,000                  | 368,800        |                                 | 368,800             |
|         |                          |                | -500,000                        |                     |

The proposal to increase fees and charges by an additional 10% for 2 years (2027/28 and 2028/29) is forecast to raise the below additional Income.

**Table 4****Incremental MTFS adjustment**

|         | Additional 10%<br>Income generation<br>for 2 years |           |
|---------|----------------------------------------------------|-----------|
|         |                                                    |           |
| 2027/28 | £                                                  | 435,000   |
| 2028/29 | £                                                  | 567,000   |
| 2029/30 |                                                    |           |
|         | £                                                  | 1,002,000 |

**Capital and Cost of Borrowing**

There is also the capital investment side of the MTFS to be confirmed and updated. The annual cost of borrowing will need to be profiled and included in the MTFS.

The current Capital program includes £3.57m of approved schemes for Leisure, which mainly links to the Castle Leisure site. In addition to this it is estimated that c£1m of capital investment for remedial work is required at Ramsbottom, this additional c£1m needs to be built into the MTFS and capital programme.

The estimated annual cost of borrowing for the above total £4.57m would be in the region of £457k per year. This is an additional cost to the Council of running the Leisure service and should be included as part of a full cost recovery model.

**Summary**

The current forecasts for the Leisure service reflect pressures which mean that the current MTFS cannot be met, and this risks the financial sustainability of the Council.

In order to address this pressure, remove the Council subsidy, and move towards a full cost recovery model for leisure, fees and charges need to be increased in line with this proposal.

The proposed increased fee levels remain competitive in the market, ensuring that the service still offers good value for money for customers.

The main financial risks are around the significant level of estimates which are unavoidable at this point in time. The performance of the services will need to be monitored, and the MTFS updated to reflect any under or over performance to these estimates.

| MTFS                     | 2027/28 | 2028/29 | 2029/30 |
|--------------------------|---------|---------|---------|
| Income increase (£m)     | £0.435m | £0.567m |         |
| Staffing Reduction (FTE) |         |         |         |

|                           |            |
|---------------------------|------------|
| <b>Reference</b>          | Consult 03 |
| <b>Executive Director</b> | Paul Lakin |
| <b>Cabinet Member</b>     |            |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                      |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|
| <b>Service Area</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Place - Highways (Street Lighting)                                   |
| <b>Budget Reduction Name</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Highways Street Lighting Trimming                                    |
| <b>Budget Reduction Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Trimming and dimming of street lighting to reduce energy consumption |
| <b>Budget Reduction Proposal</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                                      |
| <p>Continue to expand street lighting dimming through the ongoing LED replacement programme.</p> <p>In parallel, undertake a strategic review to identify suitable locations for street lighting trimming, where reduced operating hours could deliver further energy savings in the region of £40,000 annually.</p> <p>Trimming options could include:</p> <ul style="list-style-type: none"> <li>• Switching lights off</li> </ul> <p>Reduce illuminated hours across the entire lighting stock by switching lights off during periods of very low traffic, for example between 01:00 and 05:00. Officers do not support this option because of concerns about highway safety, crime and anti-social behaviour.</p> <ul style="list-style-type: none"> <li>• Selective lighting</li> </ul> <p>Reduce illuminated hours on selected streets, sections of streets or alternate street lights. Key roads would remain fully lit, while lower-risk and less-used areas would operate for fewer hours.</p> <p>The proposal will reduce energy consumption. The financial saving achieved will depend on the unit cost of electricity, which remains subject to volatility driven by global events beyond the Council's control.</p> <p>Research suggests that approximately 50% of Local Highway Authorities in England have implemented street lighting trimming, including overnight switch off policies.</p> <p><b>Driver For Change: (Why are we doing this)</b></p> <p>To reduce energy costs and carbon emissions while helping to close the funding gap.</p> <p><b>What is the solution? (Intervention/methodology which addresses the issue/impact)</b></p> <p>Continue the rollout of the LED replacement programme, increasing the number of dimmed street lights across the lighting stock. Central Management System (CMS) LED lanterns are currently dimmed by 50% between 00:00 and 06:00. Applying the same</p> |                                                                      |

approach to newly installed CMS LED lanterns will deliver further energy savings beyond those achieved through conversion to LED alone.

Further reductions in energy consumption could also be achieved through street lighting trimming.

A blanket, network-wide approach to trimming is not proposed. Instead, a strategic review of the network and lighting stock will identify suitable locations, assess potential impacts and determine the exemptions required before implementation.

At this stage, the following locations are proposed for exemption from trimming:

- Major junctions and known collision hotspots.
- Town and district centres, where security and support for the night-time economy are priorities.
- Areas covered by CCTV.
- Areas with higher levels of crime and anti-social behaviour.

The strategic network-wide study may identify additional locations that should be exempt and will help to mitigate risks.

Council records show 21,002 street lights fitted with 22,480 lanterns. The 12,000 LED lanterns installed through Phase 1 of the replacement programme are not CMS-compatible and therefore cannot be dimmed or trimmed remotely.

### **What is the impact of the solution? (How will this benefit?)**

The proposal will reduce energy consumption, associated costs and carbon emissions.

A detailed study is required to identify the measures needed to deliver the additional annual saving of £40,000 from street lighting trimming.

There are currently 4,955 CMS-controlled LED lanterns, comprising 23 different wattages and outputs. A further 550 are scheduled for installation by the end of March 2027, increasing the total CMS controlled stock to 5,505 lanterns. All existing and new lanterns will be programmed to dim by 50% between 00:00 and 06:00, reducing energy consumption during those hours by 50%.

From 2027/28, the full-year effect of the accelerated LED replacement and dimming programme is forecast to reduce annual energy costs by £209,000, subject to fluctuations in the unit price of electricity.

One option under review is to switch off alternate CMS-controlled street lights. As some CMS LED lanterns are likely to be in exempt areas, potential savings have prudently been based on switching off no more than 2,500 lanterns.

A detailed assessment is required to quantify the saving accurately. This cannot be completed until all lanterns have been installed and their individual wattages are known.

However, based on current energy tariffs, switching off 2,500 30W LED lanterns will deliver the following:

Trimmed Hours Annual Saving (approx.)

01:00hrs to 05:00hrs £30,000

00:00hrs to 06:00hrs £45,000

To manage accident and incident risks, CMS controlled lighting should be capable of remote restoration to full output when required. The Bradley Fold Emergency Control Room could manage this function, subject to appropriate permissions and training on the Interact City CMS platform.

Signify, the Council's CMS provider, is expanding system capacity for the proposed switch-off regime and migrating the inventory from CityTouch to Interact City to overcome existing software limitations. Completion is expected within the coming weeks.

Numerous studies have been conducted on the impact of trimming street lighting, which have consistently shown no statistical link to increased crime, ASB or road traffic accidents. These studies include a study by APSE which found that local councils adopting trimming policies saw no change in the number of night time traffic collisions.

| MTFS                     | 2027/28 | 2028/29 | 2029/30 |
|--------------------------|---------|---------|---------|
| Budget Reduction (£m)    | £0.040m |         |         |
| Staffing Reduction (FTE) |         |         |         |

***What impact does the proposal have on:***

#### **Service Delivery**

The proposal will reduce the street lighting energy requirement, associated expenditure and carbon emissions. Trimming will also reduce illuminated operating hours on selected streets, subject to the strategic review, consultation and agreed exemptions.

#### **Communities and Service Users**

This is an extension of an already embedded programme of dimming. To date there has been no negative feedback from communities or service users. The impact of this proposal on the Safer Streets Strategy will be considered and the Community Safety Partnership, including GMP, will be engaged during consultation

#### **Other Partner Organisations**

#### **Key Risks and Mitigations**

| Risks                                                                    | Mitigations                                               |
|--------------------------------------------------------------------------|-----------------------------------------------------------|
| There are already two Capital programmes in progress in street lighting. | Additional staff/consultancy time for project management. |

|                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Time taken to complete the work and therefore delivery of the associated savings.                                                                                                                                                                                             | Existing GMCA Frameworks will be used for the work. Letting further contracts from The Chest to assist with the project. Taking on temporary staff (internal) to assist with the project.                                                                                                                                |
| Future energy prices decrease reducing estimated savings and increasing the time in which savings will be paid back.                                                                                                                                                          | Without this investment the Council would have to find additional funding to cover energy costs increases. This proposal will mitigate against the increases.                                                                                                                                                            |
| There is an annual cost for the Philips City Touch system after the initial 10 year (given at time of lantern purchase) has expired.<br>This is estimated at around £5 per lantern. The GMCA Street Lighting Group are looking at a contract for this to reduce these costs.  | It may transpire that paying an annual fee for each lantern, takes up a significant amount of any savings achieved.<br>The current settings of the lantern (including any dimming) will be maintained if the CityTouch subscription expires. However, remote alteration of lantern settings will no longer be available. |
| Delivery delays due to material shortages, etc., may extend estimated completion time.<br>Price increases may result in less work being carried out and thereby reducing savings.                                                                                             | Purchasing all the required materials at the start of the project would alleviate this and also negate any future price increases.                                                                                                                                                                                       |
| Energy calculations are quite complex and actual savings might be lower than estimated.                                                                                                                                                                                       | A combination of previous examples, experience, and airing on the side of caution have been used to try and ensure that as accurate an estimate as possible has been achieved.<br>Savings will still be achieved, and it is possible they may be even more than estimated.                                               |
| Increase in crime and anti-social behaviour and negative impact on the Safer Streets Strategy from Central Government.                                                                                                                                                        | Trimming will only be rolled out to a selection of streets where this a low risk.                                                                                                                                                                                                                                        |
| Variations in weather will affect the amount of energy savings, for example, sunny, bright days use less energy than dull, cloudy days. (The streetlights are programmed to switch on at a specific lux level (lighting level) which varies depending on weather conditions.) | None.                                                                                                                                                                                                                                                                                                                    |

|                           |            |
|---------------------------|------------|
| <b>Reference</b>          | Consult 04 |
| <b>Executive Director</b> | Paul Lakin |
| <b>Cabinet Member</b>     | Lucy Smith |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                   |
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| <b>Service Area</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Place – Waste and Transport                                                                                                                                       |
| <b>Budget Reduction Name</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Introduction of a Garden Waste Subscription Service                                                                                                               |
| <b>Budget Reduction Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Introduction of a chargeable garden waste collection service, whilst continuing to provide free food waste collections in accordance with statutory requirements. |
| <b>Budget Reduction Proposal</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                   |
| <p>It is proposed that the Council introduces a subscription-based garden waste collection service for households wishing to have garden waste collected through the brown bin service. Residents choosing to participate would pay an annual subscription fee and receive a permit to access to the service.</p> <p>The proposal reflects a model already adopted by the majority of local authorities and recognises that garden waste collection is a discretionary service for which local authorities can charge. Food waste collections would continue to be provided free of charge in line with statutory requirements and Simpler Recycling legislation.</p> <p>A comprehensive communications and engagement programme will be undertaken to maximise participation, ensure residents understand the changes and promote the environmental benefits of home composting, Household Waste Recycling Centres and the subscription service.</p> |                                                                                                                                                                   |

| <b>MTFS</b>              | <b>2027/28</b> | <b>2028/29</b> | <b>2029/30</b> |
|--------------------------|----------------|----------------|----------------|
| Income increase (£m)     | -              | £0.562m        | £0.050m        |
| Staffing Reduction (FTE) | -              |                |                |

***What impact does the proposal have on:***

|                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Service Delivery</b>                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| <p>The proposal introduces a chargeable subscription service for garden waste collections.</p> <p>Residents choosing not to subscribe will continue to receive a free food waste collection service but will no longer receive garden waste collections through the brown bin service.</p> <p>The proposal represents a significant service change and will require new customer processes, permit management arrangements and communications materials.</p> |

Service performance, participation rates and environmental impacts will be monitored following implementation.

### **Organisation (Including Other Directorates/Services)**

Successful implementation will require support from ICT, Digital Services, Customer Services, Communications, Procurement and Finance teams.

ICT and Digital Services support will be required to develop online registration, payment and permit management systems together with website updates and customer account functionality.

Customer Services and the Contact Centre are likely to experience increased demand during implementation and renewal periods and will require training and revised procedures.

Communications support will be required to develop and deliver a comprehensive resident engagement campaign before and during implementation.

Communications support will be required to develop and deliver a comprehensive resident engagement campaign before and during implementation.

### **Workforce**

The proposal will require changes to collection rounds and operational arrangements. Workforce resources may need to be realigned to reflect participation levels and service demand following implementation.

Additional temporary resource requirements may arise during the implementation phase to support customer enquiries, permit administration and service mobilisation.

### **Communities and Service Users**

Residents who currently receive a co-mingled food and garden waste collection service will experience a change in service provision.

Households choosing not to subscribe to the garden waste collection service will continue to receive free food waste collections but will need to utilise alternative disposal routes for garden waste, such as home composting, Household Waste Recycling Centres or the subscription service.

As the proposal introduces a charge for a service that is currently provided without additional cost to residents, there may be affordability concerns for some households. Clear communications and support materials will be required to help residents understand the options available.

| <b>Risks</b>                                                                           | <b>Mitigations</b>                                                                                                                                                                                              |
|----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Low uptake of the subscription service resulting in income targets not being achieved. | Undertake comprehensive resident engagement and communications. Benchmark charges against neighbouring authorities, implement a simple sign-up process and promote the benefits and convenience of the service. |

|                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Increase in GMCA Levy Costs                                                                          | Tonnages will be reviewed regularly to assess the net impact of the scheme, and communications will be used to encourage participation in the garden waste service. Collection round efficiencies and income generation will be monitored to ensure the overall financial benefits of the proposal are maintained.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Reduction in recycling tonnage resulting in a reduced Extended Producer Responsibility (EPR) income. | <p>Lower participation in the garden waste service could reduce recycling tonnages and therefore impact future EPR funding. The extent of this impact is currently unknown and could potentially exceed the income generated from the subscription scheme. Recycling performance, participation rates and EPR funding arrangements will be closely monitored, with communications and service promotion used to maximise resident uptake and maintain recycling levels.</p> <p>Evidence from neighbouring GM authorities indicates that charging for garden waste leads to a reduction in kerbside garden waste collections. Following the introduction of charges, garden waste tonnages reduced by 16.62% in Stockport and 10.24% in Trafford, despite both authorities providing a weekly food waste collection service. This will also impact on the EPR income they receive.</p>                                                           |
| Increased fly tipping or inappropriate disposal of garden waste                                      | Implement proactive communications promoting legal disposal routes, home composting and Household Waste Recycling Centres. Continue monitoring and enforcement activity where required.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Reduced Progress Towards Statutory Recycling Targets                                                 | <p>The introduction of a chargeable garden waste service could reduce participation in garden waste recycling and impact the Council's overall recycling rate. This presents a risk to achieving future national and local recycling targets, including the requirement under the Simpler Recycling reforms and associated environmental objectives to achieve a recycling rate of 60% by 2034. Charging for garden waste significantly reduced the amount of garden waste collected at the kerbside with reductions of 16.62% in Stockport and 10.24% in Trafford.</p> <p>The Council will closely monitor participation rates, recycling performance and tonnage trends following implementation. A strong communication and engagement programme will be delivered to maximise uptake of the subscription service and promote alternative recycling options such as home composting. Recycling performance will be regularly reviewed to</p> |

|                                                                                              |                                                                                                                                                                                      |
|----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                              | identify any corrective action required to support achievement of future statutory recycling targets.                                                                                |
| Significant increase in customer enquiries and complaints.                                   | Provide clear and timely communications, website information, FAQs and Contact Centre training. Ensure sufficient resources are available during implementation and renewal periods. |
| ICT and payment systems not delivered in time for implementation.                            | Engage ICT and Digital Services at an early stage and develop a detailed project plan with testing and contingency arrangements prior to launch.                                     |
| Residents do not understand the distinction between food waste and garden waste collections. | Deliver a clear communications campaign explaining the new arrangements, statutory food waste collection requirements and the options available for garden waste disposal.           |

| Milestone                     | Timeline                  |
|-------------------------------|---------------------------|
| Recruitment of temp vacancies | June – September 2027     |
| Procurement of bin stickers   | September – November 2027 |
| Service Development           | September – March 28      |
| Go live                       | March 2028                |

### **Financial Implications and Investment Requirements**

| Investment requirements – Revenue and Capital                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Initial investment will be required to support implementation of the scheme, including permit management, customer communication materials, website and ICT developments, payment systems, food waste containers and associated operational setup costs.</p> <p>The financial saving included within this proposal is net of these implementation costs.</p> <p>Ongoing income generation will be dependent upon resident participation levels, annual subscription charges and the continued efficient delivery of the service.</p> |

|                           |                   |
|---------------------------|-------------------|
| <b>Reference</b>          | Consult 05        |
| <b>Executive Director</b> | Jeanette Richards |
| <b>Cabinet Member</b>     | Cllr Walmsley     |

|                                     |                                                        |
|-------------------------------------|--------------------------------------------------------|
| <b>Service Area</b>                 | CYP                                                    |
| <b>Budget Reduction Name</b>        | School Crossing Patrol Service Redesign                |
| <b>Budget Reduction Description</b> | Review of non-statutory School Crossing Patrol Service |

| <b>MTFS</b>              | <b>2027/28</b> | <b>2028/29</b> | <b>2029/30</b> |
|--------------------------|----------------|----------------|----------------|
| Budget Reduction (£m)    | £0.100m        | £0.087m        |                |
| Staffing Reduction (FTE) | 3.0fte         | 2.5fte         |                |

| <b>Budget Reduction Proposal</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
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| <p>To significantly reduce the non-statutory school crossing patrol service by April 2027, taking a risk-based approach, and working in partnership with the Department for Place (Highways) and our Schools &amp; Academies.</p> <p><b>Criteria for Establishing/Continuing SCP Points</b></p> <p>The Department has adopted the guidance from the School Crossing Patrol Service Guidelines for the calculation to determine the criteria for the establishment of school crossing patrols.</p> <p>All crossing sites are subject to a classified count every 2 years to ensure the crossing facility meets the criteria for a school crossing point to be in place or where there is a change in circumstances such as road or traffic changes. There are various elements of the site assessed during the count which include recording; number of child pedestrians and the number of vehicles (light vehicles, large goods vehicles and cycles). In addition to pedestrians and vehicles consideration is also given to the speed of the traffic, visibility on the road, street lighting, road markings and the age of the children crossing.</p> <p>The service has used local knowledge to RAG rate each crossing and have determined that the high-priority points will be retained, however the medium and low-priority points are proposed to be disestablished.</p> <ul style="list-style-type: none"> <li>• <b>Six points are designated as high priority</b></li> <li>• <b>Six points are designated as medium priority</b></li> <li>• <b>Twenty-six points are designated as low priority</b></li> <li>• <b>Three points require review and recounts prior to a recommendation being determined, these counts will take place in November 2026.</b></li> </ul> |

| Organisation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Place, Highways, Road Safety, Schools, Academies, HR<br>All SCPs are currently required to attend an annual medical with Optima to review their fitness to work, therefore reduced staffing would reduce these HR costs.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Workforce                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <p><b>Service reduction – retention of points designated at high risk</b> will impact on the majority of SCP posts. A total of 32 points would be disestablished if high risk only points remain operational, resulting in 15 staffed posts being deleted, 1 post would be redeployed to a vacant high-priority crossing. Points differ in the number of staff hours, <b>based on an average cost of a SCP at £5,674 staffing savings of £187,242.</b></p> <p>Where a school crossing patrol is in place, there is a requirement for the Council to have sufficient arrangements for the employment and training of staff to allow the enforcement / stopping of traffic to take place.</p> <p>The School Crossing Patrol Service Guidelines state that it is best practice for the department responsible for highways, traffic and engineering to manage the SCP service. This allows for greater flexibility for co-ordination of Highways services, for example, temporary road works or road closures when the SCP facility needs to be adjusted to assist traffic management.</p> <p>The ratio of Supervisors to SCP's should be 1 full-time equivalent supervisor (plus administrative support) to 40 patrols, this ratio enables regular supervisory visits to be conducted. The current SCP Supervisor is carrying out administrative function in addition to their supervisory duties.</p> <p>The recommendation is that school crossing patrols continue to cover sites identified as high risk, to support community safety.</p> |
| Communities and Service Users                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Negative community impact – see above                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

### Key Risks and Mitigations

| Risks                                                           | Mitigations                                                                                                                                                                                                                                                              |
|-----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Road Safety                                                     | <p>TfGM/Bee Network Guidance – Safe Travel, Travelling independently</p> <p>Installation of automated crossings</p> <p>Parental responsibility for ensuring children are safe travelling to and from school</p> <p>Retention of crossings deemed to be high risk (6)</p> |
| Reputational                                                    | <p>Whilst school crossing patrols have been seen as an important element in meeting the Council's duties to prevent accidents, promote road safety and sustainable travel to schools, these duties can also be met in other ways.</p>                                    |
| Recruitment & retention of staff (if reduced service continues) | <p>Deployment of displaced patrol staff to high-risk points</p>                                                                                                                                                                                                          |

|                                                                  |                        |
|------------------------------------------------------------------|------------------------|
| Financial sustainability                                         | Termination of Service |
| <b><u>Financial Implications and Investment Requirements</u></b> |                        |
| <b>Investment requirements – Revenue and Capital</b>             |                        |
| Redundancy costs to affected staff.                              |                        |

|                           |                   |
|---------------------------|-------------------|
| <b>Reference</b>          | Consult 06        |
| <b>Executive Director</b> | Jeanette Richards |
| <b>Cabinet Member</b>     | Cllr Walmsley     |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                 |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Service Area</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | CYP - Youth Service & Participation                                                                                                                                                                                                             |
| <b>Budget Reduction Name</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Youth Service Establishment Review                                                                                                                                                                                                              |
| <b>Budget Reduction Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Review of the remaining permanent Youth Service staffing establishment to reduce ongoing budget commitments and maximise opportunities to deliver youth provision through external funding, commissioned services and partnership arrangements. |
| <b>Budget Reduction Proposal</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                 |
| <p>The consideration is for the removal of the remaining permanent staffing establishment within the Youth Service. The service review is part of wider service redesign. This saving £0.145m will be effective from April 2027.</p> <p>The next phase would consider aligning youth provision service alongside the wider statutory duties of the Youth Justice Service and Families First Partnership Implementation. We still continue to look to deliver through alternative models, including government grant funding, Young Futures Hub funding, VRU-funded initiatives, and partnership arrangements.</p> <p>However, future grant funding cannot be guaranteed and may be time limited. Existing Youth Cabinet, SEND participation, targeted youth support and preventative youth work provision would be reviewed as part of any proposed future delivery model.</p> |                                                                                                                                                                                                                                                 |

| <b>MTFS</b>              | <b>2027/28</b> | <b>2028/29</b> | <b>2029/30</b> |
|--------------------------|----------------|----------------|----------------|
| Budget Reduction (£m)    | £0.145m        |                |                |
| Staffing Reduction (FTE) | 2.0            |                |                |

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***What impact does the proposal have on:***

|                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Property</b>                                                                                                                            |
| The Youth Service is currently located in the Elizabethan Suite, although we are driving an increased level of activity in neighbourhoods. |
| <b>Service Delivery</b>                                                                                                                    |

Currently the service delivers open access to youth groups, activities focused on social clubs, sports, support groups (including for SEND, young carers), youth leadership, health clinics, and special interest groups (LGBT sessions, Duke of Edinburgh). It also delivers targeted youth support, some of which is delivered through outreach and detached work.

#### **Organisation (Including Other Directorates/Services)**

The Youth Service contributes to prevention and early intervention activity across Children's Services and wider partnership arrangements linked to our statutory duties in Youth Justice services and prevention of serious youth violence.

#### **Workforce**

The proposal would affect the remaining permanent Youth Service workforce, staff. If staff cannot be redeployed to suitable alternative posts, we would potentially face redundancy costs.

#### **Communities and Service Users**

Children and young people will experience a reduction in locally delivered youth support services. Areas of current delivery by the council that will cease include:

- Universal youth provision.
- Targeted early help and preventative support.
- Democratic youth participation via Youth Cabinet, supporting a Youth Mayor and Youth MP activity.
- SEND participation opportunities, requirement to consult and co-produce as per the SEND code of practice (all statutory duties will be met in relation to SEND provision)
- Community-based youth engagement programmes.

#### **Other Partner Organisations**

- Community Safety Partnership
- Violence Reduction Unit funded programmes
- SEND participation activities and Youth Cabinet work
- Voluntary Community and Faith Sector.

| <b>Risks</b>                                                     | <b>Mitigations</b>                                                                                    |
|------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| Loss of preventative youth provision for vulnerable young people | Seek alternative funding streams and commissioning opportunities                                      |
| The programme of change to establish the adolescent service      | Consult with staff and young people and our partners.                                                 |
| Reputational impact associated with reviewing youth services     | Clearly communicate rationale and explore all alternative funding opportunities before implementation |

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|------------------------------------------------------|
| <b>Investment requirements – Revenue and Capital</b> |
|------------------------------------------------------|

|                                                                      |
|----------------------------------------------------------------------|
| Investment would be any exit costs relating to review of the service |
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