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EXECUTIVE CABINET

Day: Wednesday
Date: 25 October 2023
Time: 1.00 pm
Place: Committee Room 2 - Tameside One

Item No.	AGENDA	Page No
1.	APOLOGIES FOR ABSENCE To receive any apologies for the meeting from Members of the Executive Cabinet.	
2.	DECLARATIONS OF INTEREST To receive any declarations of interest from Members of Executive Cabinet.	
3.	MINUTES The Minutes of the meeting of the Executive Cabinet held on 27 September 2023 to be signed by the Chair as a correct record.	1 - 8
4.	PERIOD 5 2023/24 FORECAST OUTTURN – REVENUE AND CAPITAL. To consider a report of the First Deputy (Finance, Resources & Transformation) / Director of Resources.	9 - 26
5.	MEDIUM TERM FINANCIAL STRATEGY UPDATE To consider a report of the First Deputy (Finance, Resources & Transformation) / Director of Resources.	27 - 40
6.	DELIVERING BETTER VALUE IN SEND To consider a report of the Executive Member for Education, Achievement & Equalities / First Deputy (Finance, Resources & Transformation) / Director of Childrens Services.	41 - 146
7.	UK SHARED PROSPERITY FUND UPDATE To consider a report of the Executive Member for Inclusive Growth, Business & Employment / Director of Place.	147 - 158
8.	BIODIVERSITY NET GAIN To consider a report of the Executive Member for Planning, Transport and Connectivity / Executive Member for Climate Emergency and Environmental Services / Director of Place.	159 - 168

From: Democratic Services Unit – any further information may be obtained from the reporting officer or from Carolyn Eaton, Principal Democratic Services Officer, to whom any apologies for absence should be notified.

Item No.	AGENDA	Page No						
9.	OPTIONS FOR REDUCING STREET LIGHTING ENERGY CONSUMPTION. To consider a report of the First Deputy (Finance, Resources & Transformation) / Assistant Director, Operations and Neighbourhoods.	169 - 180						
10.	CONTRACT FOR THE PROVISION OF AN E-CONTRACT PERFORMANCE SYSTEM To consider a report of the Executive Member for Adult Social Care Homelessness & Inclusivity / Director of Adult Services.	181 - 188						
11.	ADULT SERVICES HOUSING AND ACCOMMODATION WITH SUPPORT. PRIVATE RENTED SECTOR OPPORTUNITIES To consider a report of the Executive Member for Adult Social Care Homelessness & Inclusivity / Director of Adult Services.	189 - 200						
12.	FORMER ACTIVE TAMESIDE SITES – ASHTON SWIMMING POOL AND LONGDENDALE RECREATION CENTRE To consider a report of the First Deputy (Finance, Resources & Transformation) / Head of Estates.	201 - 246						
13.	EXEMPT ITEM The Proper Officer is of the opinion that during the consideration of the appended document set out below, the meeting is not likely to be open to the press and public and therefore the appended document listed below is excluded in accordance with the provisions of the Schedule 12A to the Local Government Act 1972.							
<table border="1"> <thead> <tr> <th data-bbox="256 1111 587 1149">Item</th> <th data-bbox="595 1111 791 1149">Paragraphs</th> <th data-bbox="799 1111 1273 1149">Justification</th> </tr> </thead> <tbody> <tr> <td data-bbox="256 1160 587 1223">APPENDIX 2 FOR ITEM 14</td> <td data-bbox="595 1160 791 1189">3&10</td> <td data-bbox="799 1160 1273 1424">The appended document contains exempt information relating to paragraph 3 and 10 of Part 1 of Schedule 12A of the Local Government Act 1972 (as amended) in that it relates to private financial and business affairs of a particular person.</td> </tr> </tbody> </table>			Item	Paragraphs	Justification	APPENDIX 2 FOR ITEM 14	3&10	The appended document contains exempt information relating to paragraph 3 and 10 of Part 1 of Schedule 12A of the Local Government Act 1972 (as amended) in that it relates to private financial and business affairs of a particular person.
Item	Paragraphs	Justification						
APPENDIX 2 FOR ITEM 14	3&10	The appended document contains exempt information relating to paragraph 3 and 10 of Part 1 of Schedule 12A of the Local Government Act 1972 (as amended) in that it relates to private financial and business affairs of a particular person.						
14.	LAND AT GRAFTON STREET, HYDE - DISPOSAL To consider a report of the First Deputy (Finance, Resources & Transformation) / Assistant Director of Strategic Property.	247 - 254						
15.	URGENT ITEMS To consider any additional items the Chair is of the opinion shall be dealt with as a matter of urgency.							
16.	DATE OF NEXT MEETING To note the date of the next meeting of Executive Cabinet is scheduled to take place on 22 November 2023.							

From: Democratic Services Unit – any further information may be obtained from the reporting officer or from Carolyn Eaton, Principal Democratic Services Officer, to whom any apologies for absence should be notified.

Agenda Item 3

EXECUTIVE CABINET

27 September 2023

Commenced: 1pm

Terminated: 1.24pm

Present: Councillors Cooney (Chair), Choksi, Fairfoull, Feeley, Jackson, Kitchen (ex-officio), North, Sweeton, Taylor, Ward and Wills

In Attendance:

Sandra Stewart	Chief Executive
Ashley Hughes	Director of Resources (s151)
Allison Parkinson	Interim Director of Children's Services
Julian Jackson	Director of Place
Debbie Watson	Director of Population Health
Ilys Cookson	Assistant Director of Exchequer Services
Simon Brunet	Head of Policy, Performance and Intelligence
Jordanna Rawlinson	Head of Communications

43 DECLARATIONS OF INTEREST

There were no declarations of interest.

44 EXECUTIVE CABINET

RESOLVED

That the Minutes of the meeting of Executive Cabinet held on 30 August 2023 be approved as a correct record.

45 ENVIRONMENT AND CLIMATE EMERGENCY WORKING GROUP

RESOLVED

That the Minutes of the meeting of the Environment and Climate Emergency Working Group held on 30 August 2023 be noted.

46 PERIOD 4 2023/24 FORECAST OUTTURN – REVENUE AND CAPITAL.

Consideration was given to a report of the First Deputy (Finance, Resources & Transformation) / Director of Resources. The report detailed period 4 monitoring for the current financial year showing the forecast outturn position. The report also reviewed the financial position for the General Fund revenue budget, the Dedicated Schools Grant and the Capital Budget.

It was reported that the underlying revenue position was £11.674m at Period 4, this was a favourable movement of £0.590m from Period 3 (where it was £12.264m). Compensatory management actions had been put in place to deliver a forecast balanced position. The favourable movement was primarily driven by forecast reductions in external residential placements in Children's Social Care.

There was a forecast deficit on the Dedicated Schools Grant of £2.540m, driven by High Needs Block costs forecast above the grant resources.

The Capital programme was forecasting an underspend in-year, with subsequent reprofiling of budgets to future years, of £12.909m. This is due to programme rephasing at major projects including Godley Green and Hawthorn's Special School.

RESOLVED

That Executive Cabinet APPROVES:

- (i) The proposed contingency budget virements as part of routine financial management.
 1. Street lighting energy costs, £0.782m. As a result of national energy cost rises.
 2. Business rates on Council assets, £0.099m. Following the national 2023 Business rates revaluation the rateable values of Council's buildings increased from the 1 April 2023.
- (ii) The acceptance of additional workforce market sustainability and improvement fund grant funding of £1.755m from the Department of Health and Social Care that was announced on 28 July 2023. The funding is to be allocated to the Adult Services 2023/24 revenue budget in accordance with the grant conditions. The supporting proposals on use of the grant award will be included in a subsequent report for approval.
- (iii) The acceptance of additional Disabled Facilities Grant capital funding of £0.249m from the Department for Levelling Up Housing and Communities that was announced on 7 September 2023. The capital funding is to be allocated to the Adult Services 2023/24 capital programme and will be reflected at Strategic Planning and Capital Monitoring Panel.
- (iv) The acceptance of the Youth Justice Grant 2023/24 of £0.586m to contribute to the functions of the Youth Justice Service, including both prevention services to reduce offending and activity to support young people going through the Youth Justice system. The grant allocation is higher than was budgeted in the 2023/24 budget by £0.123m, reducing the forecasted use of General Fund resources, which will be reflected in the forecasts within the Period 5 budget monitoring as a favourable variance movement in Children's Services. The Funding letter is set out at appendix 1 together with the grant agreement (appendix 2)

That Executive Cabinet NOTES:

- (i) The forecast General Fund revenue budget position of an underlying pressure of £11.674m, which is a favourable movement of £0.590m from Period 3 reporting.
- (ii) The management actions being taken of £11.710m, which have been monitored for delivery, are currently on track, and will be reported back to Cabinet on a regular basis.
- (iii) That there is a projected overall underspend of £0.036m, following the application of management actions, as outlined in Table 2.
- (iv) The forecast deficit on the Dedicated Schools Grant of £2.540m, primarily arising from the High Need Block.
- (v) The Capital programme position of projected spend of £46.321m, following Cabinet approval to reprofile project spend of £12.909m to 2024/25.

47 STRATEGIC PERFORMANCE AND DELIVERY FRAMEWORK

Consideration was given to a report of the Executive Leader / Chief Executive. The report presented the review of the and refresh of the Strategic delivery and performance framework.

Following the establishment of the Office for Local Government (Oflog), the consultation on new Best Value Duty statutory guidance and the need for continuous improvement it was appropriate and timely to review and refresh (where necessary) the council's approach.

This paper presented the conclusions of that review and outlined the proposed codified model going forward. The proposed framework is attached at Appendix 1. The framework would be implemented subject to agreement by the Executive Cabinet on 27 September 2023.

RESOLVED

That Executive Cabinet agree the framework at Appendix 1 and support its implementation and delivery subject to agreement by the Executive Cabinet on 27 September 2023.

PROTECTED GROUPS

Consideration was given to a report of the Executive Member for Education, Achievement and Equalities. The report summarised the evidence used to inform the review and recommendations.

The proposed new template took a three-stage approach, the proposed new EIA was attached at Appendix 1.

- Part A – initial screening. To summarise the proposal; make an initial assessment of impact; and decide whether there is a need to do a full EIA (Part B).
- Part B – full EIA. To outline evidence and issues to consider (data & intelligence, engagement & voice, legislation and finance); assess impact; and develop mitigations.
- Part C – post-implementation. To review the impacts and mitigations at 6 and 12 months after the proposal has been implemented.

Most local authorities include additional local protected groups alongside the nine outlined in the Equality Act 2010. Tameside was one those and had include local protected groups for a number of years. These additional groups had been adopted on the basis of being a priority area of focus for the council and partners and/or a group whose needs require extra attention. Attached at Appendix 2 was a proposed refresh of the local protected groups to be adopted by Tameside Council (subject to agreement by Executive Cabinet).

RESOLVED

- Agree the new Equality Impact Assessment (EIA) template attached at Appendix 1 is adopted by the council.**
- Confirm the corporate standard that Equality Impact Assessments (EIA) should be included with all proposals going through the governance process; cited (with key issues) on the front sheet of reports; and mitigations reviewed after the implementation of proposals.**
- Agree the revised local protected groups (in addition to those in the Equality Act 2010) outlined at Appendix 2 are adopted by the Council.**

49 ADULT SOCIAL CARE MARKET POSITION STATEMENT 2023-2026

Consideration was given to a report of the Executive Member for Adult Social Care, Homelessness and Inclusivity / Director of Adult Services. The report sought approval for the adoption and publication of the Adult Social Care Market Position Statement 2023-2026.

It was explained that in meeting its Care Act duties on local in facilitating a vibrant, diverse and sustainable market the Market Position Statement documents Adult Services direction for delivering high quality care and support in the area for the benefit of the local population. This document and the data in it were presented in such a way as to encourage providers to analyse, interpret and innovate by way of contributing to the realisation of Tameside's vision for the future.

The Market Position Statement was one element of Adult Services approach to develop and improve our communication with partners, encouraging creativity and innovation, sharing ideas and best practice and engaging with our communities to better understand what local people need and want from their support. Given the challenges facing Councils and Adult Services, and adjustments required as new data on trends was made available it is intended that this Market Position Statement will be reviewed and amended on an annual basis.

RESOLVED

That Executive Cabinet approves the adoption and publication of the Adult Social Care Market Position Statement 2023-2026.

50 ADULT SERVICES COMMISSIONING INTENTIONS REPORT 2024/2025

Consideration was given to a report of the Executive Member for Adult Social Care, Homelessness and Inclusivity / Director of Adult Services. The report summarised the strategic commissioning plan of Adult Services outlining activity that will take place during 2024-2025 thus ensuring effective resource planning. This was to be achieved by executing the available contract extensions for a number of contracts whilst options appraisals were carried out to inform the future tender exercises.

In addition there were a number of supported accommodation contracts which were due to expire between September 2023 and March 2025 and therefore the report sought approval to align contract end dates via extensions to enable a review of the supported accommodation model prior to re-tendering those arrangements. The report set out specific details on the following service agreements:

- Community Response Service – Call Handling Service
- Provision of an integrated electronic staff monitoring and scheduling solution.
- Delivery of a Payroll Service for those receiving direct payments
- Care Act Support Partnership Arrangement to support VCFSE sector across Tameside
- Supported Accommodation
 - Provision for adults with a learning disability living in their own home
 - Intensive Community Based Support for people with a learning disability
 - Provision of respite service for adults with a learning disability

RESOLVED

That Executive Cabinet be recommended to approve:

- (i) **Extend the current provision of a Community Response Service – Call Handling Service for seven months and six days from 25 February 2024 to 31 September 2024 and tender for the provision of a new contract for the contract period of six years to commence 1 October 2024 to 31 September 2030.**
- (ii) **Tender for the provision of an integrated electronic staff monitoring and scheduling solution for a contract period of five years and 24 days to commence 7 March 2024 to 31 March 2029.**
- (iii) **Extend the current delivery of a Payroll Service for those receiving direct payments for the period of two years from 1 November 2024 to 31 October 2026.**
- (iv) **Extend the Care Act Support Partnership Agreement with Action Together to act as the local infrastructure organisation to the voluntary, community, faith and social enterprise sector (VCFSE) for a period of three years to commence 1 April 2025 to 31 March 2028.**
- (v) **Agree a review of all supported accommodation for people with a learning disability to take place whereby a refreshed model and permission to tender will be presented to Cabinet in July 2024.**
- (vi) **Extend the following contracts included in the review of Supported Accommodation to enable the contract end dates be aligned:**
 - a. **Extend the current contract for the provision of the intensive community based support for people with a learning disability for a period of 12 months from 1 April 2024 to 31 March 2025**
 - b. **Extend the current contract for the provision of respite service for adults with a learning disability for a period of 18 months from 1 October 2023 to 31 March 2025**
- (vii) **That permission is given for the Director of Adult Services, in consultation with the Executive Member for Adult Social Care, Homelessness and Inclusivity, to approve the contract awards following the tenders, subject to compliance with the Council's Procurement Standing Orders.**

51 HOUSING BENEFIT MODIFIED SCHEME

Consideration was given to a report of the First Deputy (Finance, Resources and Transformation) / Assistant Director of Exchequer Services. The report sought approval for the continuation with the Modified Scheme for Housing Benefit as detailed in Section 2 of the report for a 12 month period.

It was explained that the Council administers Housing Benefit on behalf of the DWP in accordance with the Social Security Contributions and Benefits Act 1992 and the Social Security Administration Act 1992. Section 134(8)(a) of The Social Security Administration Act 1992 allowed local authorities to modify the Housing Benefit scheme, the cost of which was met by the Council. The Council had modified the scheme for many years to offer additional protection to residents in receipt of any prescribed war disablement pension or prescribed war widow's pension.

The cost to the Council for 2023 / 2024 was estimated to be £26,794 less a payment from the DWP, in lieu of the Council having a local scheme, of £20,096, resulting in an estimated net cost to the Council of £6,698. It was envisioned that the cost would reduce year on year due to the impact of Universal Credit migration and reducing eligible claimant numbers.

RESOLVED

That Executive Cabinet approve the continuation of the Modified Scheme for Housing Benefit as detailed in Section 2 of the report for a 12 month period.

52 ASHTON PUBLIC REALM STRATEGY

Consideration was given to a report of the Executive Member for Town Centres, Communities / Director of Place. The report incorporated the principles of the approved Phase 1 Public Realm Strategy in sets out the vision, design principles and key themes for the wider town centre in ensuring a robust and cohesive town centre wide strategy was in place to attract further investment into Ashton Town Centre.

The redevelopment of this significant civic outdoor space provides an opportunity to kickstart the regeneration of Ashton Town Centre. Building on several of the design principles within the Phase 1 strategy, this Phase 2 strategy provided the wider context for regenerating the town centre. Proposals focus on destinations and place making and seek to ensure that these are well connected to the core of the town centre, Market Square and surrounding businesses and assets.

The strategy provided a cohesive approach to regeneration in the town centre, building on some of the towns existing assets such as St Petersfield, Ikea, the shopping centres and landmark heritage features along Stamford Street and Old Street. Whilst the proposals (aside from the Phase 1 Market Square planning application) sit outside of the existing Levelling Up Funding, the strategy would enable the Council to seek additional funding to help to deliver on the vision for Ashton Town Centre outlined in this strategy.

RESOLVED

That Executive Cabinet APPROVES:

- (i) The proposed Phase 2 Public Realm Strategy for the wider Town Centre**
- (ii) The Director of Place proactively apply to have additional external funding to support the proposed cohesive approach to Ashton's regeneration in the Phase 2 Public Realm Strategy.**

That Executive Cabinet NOTES:

- (iii) Progress made to date in delivering the Phase 1 Market Square proposals.**
- (iv) There is no funding currently available to deliver any of the schemes and initiatives identified in this Phase 2 strategy.**

53 HOMES ENGLAND / GREATER MANCHESTER COMBINED AUTHORITY REVENUE FUNDING

Consideration was given to a report of the First Deputy (Finance, Resources & Transformation) / Executive Member for Inclusive Growth, Business and Employment / Director of Place. The report provided an update on the position with regard to external funding for projects at Droylsden Town Centre and Ashton Town Centre from Homes England via the Greater Manchester Combined

Authority (GMCA) and sought approval to accept and spend the funding under the terms of the Grant Funding Agreements.

Droylsden Town Centre and Ashton Town Centre were projects that support delivery of GM strategic priorities, the Tameside Corporate Plan and Tameside Inclusive Growth Strategy. The revenue funding secured via GMCA provided a significant financial contribution to these projects and provided a proactive and positive response to the delivery of investment and development in Tameside.

RESOLVED

That Executive Cabinet APPROVE:

- (i) The acceptance of Grant Funding from GMCA for £0.100m at Droylsden Town Centre and £0.100m at Ashton Town Centre;**
- (ii) Delegated authority to the Director of Resources (Section 151 Officer) to enter into the Grant Funding Agreements (Appendix 1); and**
- (iii) The Director of Place to manage the programme of works associated with the Grant Fund Agreements and to commission, drawdown and incur all expenditure related to delivery with ongoing performance and reporting provided to this Executive Cabinet, or other suitable forum, on a periodic basis.**

54 PLACES FOR EVERYONE MODIFICATIONS CONSULTATION

Consideration was given to a report of the Executive Member for Planning, Transport and Connectivity / Director of Place. The report provided an update to Members on the progress of Places for Everyone Plan. A Joint Development Plan Document for 9 Greater Manchester Local Authorities (Places for Everyone Plan) and sought approval to consult upon proposed modifications to the plan.

The Inspectors' post hearing letter was published on the examination website on the 11 August 2023. The Inspectors' post hearings' letter was based on a consideration of all the evidence and on the application of professional expertise and judgment. In that letter, the inspectors state that they were now satisfied, at this stage of the examination, that all of the proposed main modifications were necessary to make the Plan sound and would be effective in that regard. This conclusion was, however, without prejudice to their final conclusions that they will reach following consideration of responses to the public consultation to be carried out on the main modifications and which are the subject of this report. Additional modifications (sometimes also referred to as minor modifications) were changes which did not materially affect the policies in the plan. They could be made to the Places for Everyone Plan, but did not fall within the scope of the examination. A separate schedule of additional modifications had been prepared which would sit alongside the main modifications schedule during the consultation period. These had been prepared at this point in time to make the modified plan more readable, but the inspectors would not consider responses made in respect of these additional modifications, as they did not fall within the scope of the examination.

Whilst the consultation was only about the proposed main modifications and the policy map changes associated with these main modifications, a schedule of additional modifications and a composite plan illustrating all the proposed modifications in situ had been prepared and were available alongside this report. All documents would be made available at the time of the consultation to assist the reader, but only representations on the main modifications are considered by the inspectors.

Whilst it was only necessary to consult on the main modifications and any related policy map changes, it was proposed to also consult on the additional modifications that had been identified too, so that the full suite of overall proposed changes to the plan are clear. The inspectors would, however, only consider comments received to the main modifications; the nine Places for Everyone authorities would consider those comments relating specifically to the additional modifications. It was proposed that the consultation would run for a period of eight weeks. Consideration of which consultation activities undertaken in Tameside at the regulation 19 stage and which continued to be appropriate for this modifications consultation were set out in Appendix 1.

RESOLVED

Executive Cabinet are recommended to:

- (i) Note progress made in respect of the Places for Everyone Plan;**
- (ii) Agree that the Places for Everyone modifications (main, additional and those relating to the policies map) and associated supporting background documents be subject to a period of representations for a period of 8 weeks commencing no earlier than 9 October 2023; and**
- (iii) Agree the next steps for the production of the Places for Everyone Plan (section 12).**

55 ASHTON MAYORAL DEVELOPMENT ZONE

Consideration was given to a report of the Executive Member for Inclusive Growth business & Employment / Director of Place. The report sought approval to create a Greater Manchester (GM) Mayoral Development Zone (MDZ) to be known as the Ashton Mayoral Development Zone (AMDZ).

The Council had identified the Ashton Growth Corridor, comprising St Petersfield, Ashton Moss and Ashton Town Centre, as one of its priority areas to deliver growth and implement the objectives of the Tameside Inclusive Growth Strategy 2021-26. The location forms part of the Greater Manchester (GM) Eastern Growth Cluster, which is one of six Growth Locations across GM that would deliver new development, create and retain jobs, offer better job opportunities, enable training and skill development to increase the number of residents in employment.

The report proposed creating a GM Mayoral Development Zone (MDZ) for the Ashton Growth Corridor area to be known as the Ashton Mayoral Development Zone (AMDZ). The AMDZ would bring together the leader of Tameside Council alongside the GM Mayor and other relevant organisations and agencies to work in partnership to deliver a joined up approach to realising the full potential of this area.

The creation of a Mayoral Development Zone (MDZ) would support delivery of the GM Eastern Growth Cluster Growth Location and the Council's growth ambitions at St Petersfield, Ashton Moss, and Ashton Town Centre. This would help to maximise the full potential of the Ashton Growth Corridor and capitalise on the existing assets and infrastructure in the area to deliver growth.

RESOLVED

That Executive Cabinet APPROVE:

- (i) To formally establish a Mayoral Development Zone (MDZ) around Ashton Growth Corridor to be known as the Ashton Development Zone (AMDZ).**
- (ii) The establishment of the AMDZ Board.**
- (iii) A budget of £100,000 (to be resourced via the unallocated Levelling Up Capacity Grant awarded to the Council of £125,000 in 22/23 and £70,000 23/24) to support the proposed next steps in Section 5 of this report.**
- (iv) The TMBC Director of Place to implement the AMDZ and manage the programme of works in Ashton associated with its establishment and delivery, subject to on-going performance and reporting to Executive Cabinet.**

That Executive Cabinet NOTE:

- (v) The principles of the business case and development strategy for the AMDZ, and in noting agree to them without modification.**
- (vi) The above recommendation will also be sought by the GM Combined Authority.**

56 EXEMPT ITEM

RESOLVED

That under Section 100 (A) of the Local Government Act 1972 the press and public be excluded for the following item of business on the grounds that:

- (i) it involves the likely disclosure of exempt information as defined in the paragraphs of Part 3&10 of Schedule 12A of the act specified below; and**

- (ii) in all circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information for reasons specified below:

Item	Paragraphs	Justification
Item 13 – Appendix	3 & 10	This report contains exempt information relating to paragraph 7 and 9 of Part 1 of Schedule 12A of the Local Government Act 1972 (as amended) in that it relates to private financial and business affairs of the Council and developers active within the Borough.

57 ITEM 13 - APPENDIX - ASHTON MAYORAL DEVELOPMENT ZONE

Members of the Cabinet noted the information contained within the Appended document to Item 13.

58 URGENT ITEMS

There were no urgent items.

CHAIR

Agenda Item 4

Report To:	EXECUTIVE CABINET
Date:	25 October 2023
Executive Member / Reporting Officer:	Cllr Jacqueline North –First Deputy (Finance, Resources & Transformation) Ashley Hughes – Director of Resources
Subject:	Period 5 2023/24 Forecast Outturn – Revenue and Capital.
Report Summary:	<p>This is the Period 5 monitoring report for the current financial year, showing the forecast outturn position.</p> <p>The report reviews the financial position for the General Fund revenue budget, the Dedicated Schools Grant (DSG) and the Capital budget.</p> <p>The underlying revenue position is £13.021m at Period 5, this is an adverse movement of £1.347m from Period 4 (where it was £11.674m). The adverse movement is primarily driven by forecast increases in Adult Services care home placements. Compensatory management actions have been put in place to deliver a forecast balanced position.</p> <p>There is a forecast deficit on the DSG of £5.317m, which is an adverse movement from Period 4 (where it was £2.540m). This has been driven by an unprecedented growth over the summer term of Education, Health and Care Plans (EHCP).</p> <p>The Capital programme is forecasting an underspend in-year, with subsequent reprofiling of budgets to future years, of £12.909m. This is due to programme rephasing at major projects including Godley Green and Hawthorn’s Special School.</p>
Recommendations:	<p>That Executive Cabinet APPROVES:</p> <ol style="list-style-type: none">1) The proposed contingency budget virements as part of routine financial management.<ol style="list-style-type: none">i. Corporate buildings energy costs, £0.819m. As a result of national energy cost rises.2) The acceptance of £0.130m grant funding from the Department of Health and Social Care to support the streamlining of local authority Adult Social Care Assessments that was announced on 29 March 2023. The funding is to be allocated to the Adult Services 2023/24 revenue budget. The supporting proposals on use of the grant award will be included in a separate report for approval.3) The acceptance of £0.027m grant funding from the Department of Health and Social Care to support expenditure relating to a review and assessment of Adult Social Care functions by the Care Quality Commission that was announced on 21 September 2023. The funding is to be allocated to the Adult Services 2023/24 revenue budget. The supporting proposals on use of the grant award will be included in a separate report for approval.

- 4) The allocation of £0.560m to the Adult Services 2023/24 revenue budget via the Council's earmarked reserve to support Adult Social Care and NHS integration initiatives. The funding is to support the forecast additional cost of the support at home model when compared to the standard home care model that is included as part of the mitigating actions figure in the Adult Services period 5 forecast.
- 5) The transfer of £0.250m from the Transformation Earmarked reserve to fund the commissioning of IMPOWER to support the development of the transformation programme to deliver the savings requirements within the MTF5.
- 6) The acceptance of £0.150m grant funding from GMCA Local Authority Grant Programme to deliver work to alleviate barriers to work, skills and education and to promote digital inclusion for adults across the borough. This will continue to fund 3 staff in post and funded through previous grant awards in both 2021/22 and 2022/23 financial years.
- 7) The acceptance of £0.088m Know your neighbourhood grant to deliver the project aimed at increasing volunteering and reducing loneliness in Tameside.

That Executive Cabinet NOTES:

- 1) The forecast General Fund revenue budget position of an underlying pressure of £13.021m, which is an adverse movement of £1.347m from Period 4 reporting.
- 2) The management actions being taken of £12.839m, which have been monitored for delivery, are currently on track, and will be reported back to Cabinet on a regular basis.
- 3) That there is a projected overall underspend of £0.036m, following the application of management actions, as outlined in Table 2.
- 4) The forecast deficit on the DSG of £5.317m, which is an adverse movement of £2.777m from Period 4 reporting.
- 5) The Capital programme position of projected spend of £46.321m, following Cabinet approval to reprofile project spend of £12.909m to 2024/25.
- 6) The indicative grant sum award to the 2023/24 Adult Services revenue budget of £0.541m from the Department of Health and Social Care to support urgent and emergency care during the 2023/24 winter period. Proposals for use of the funding are to be submitted to the Department by 29 September 2023 with approval due by 13 October 2023. A recommendation to accept the approved sum will be included in a subsequent report once confirmed

Policy Implications:

Full Council set the approved budgets in February 2023. Budget virements from Contingency to service areas is not effecting a change to the budgets set by Full Council.

Financial Implications:

As contained within the report.

(Authorised by the Section
151 Officer & Chief Finance
Officer)

Legal Implications:
**(Authorised by the Borough
Solicitor)**

The Local Government Act 1972 (Sec 151) states that “every local authority shall make arrangements for the proper administration of their financial affairs...”

Revenue monitoring is an essential part of these arrangements to provide Members with the opportunity to understand and probe the Council’s financial position.

Members will note that the underlying outturn position is a net deficit of £13.021m on Council budgets. As the council has a legal duty to deliver a balanced budget by the end of each financial year Members need to be content that there is a robust Medium Term plan in place to ensure that the council’s longer term financial position will be balanced. Ultimately, failure to deliver a balanced budget can result in intervention by the Secretary of State.

The council has a statutory responsibility to ensure that it operates with sufficient reserves in place. The legislation does not stipulate what that level should be, rather that it is the responsibility of the council’s 151 officer to review the level of reserves and confirm that the level is sufficient. Reserves by their very nature are finite and so should only be drawn down after very careful consideration as the reserves are unlikely to be increased in the short to medium term.

Risk Management:

Associated details are specified within the report.

Failure to properly manage and monitor the Council’s budgets will lead to service failure and a loss of public confidence. Expenditure in excess of budgeted resources is likely to result in a call on Council reserves, which will reduce the resources available for future investment. The use and reliance on one off measures to balance the budget is not sustainable and makes it more difficult in future years to recover the budget position.

Background Papers:

Background papers relating to this report can be inspected by contacting Gemma McNamara, Interim Assistant Director of Finance (Deputy 151 Officer):



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1. SUMMARY

- 1.1 This report presents the Council's forecast financial position across the General Fund revenue budget, DSG and Capital Programme as at August 2023.
- 1.2 It shows the Council's budgets, forecast outturn positions and underlying variances. At period 5, a risk based approach has been taken and the Council has focused on areas of high risk and high demand and volatility. The report also identifies the management actions being taken to offset adverse variances.
- 1.3 Overall, there are significant expenditure pressures and risk of £13.021m on the underlying position within the General Fund. In order to mitigate this, Officers have put in place management actions of £13.057m to reduce this overspend and maintain the position within the agreed budget, and these actions are reviewed with every budget monitoring report to confirm they remain on track.
- 1.4 A £6.817m overspend is forecast on the DSG fund, for which the work on the Delivering Better Value (DBV) project is targeted at. The DBV project is in the final stages of consideration with the Department for Education (DfE) for a revenue grant to support the deliverables agreed between the Council and the DfE.
- 1.5 The Capital budget has forecast budgets of £12.909m to be reprofiled to future years in 2023/24, this does not affect the overall programme budget which is still forecast to break-even.
- 1.6 At the time of drafting this report, the Consumer Price Index (CPI) measure of inflation was running at 6.7%, a reduction of 0.1% since July 2023. The Bank of England have responded to the inflationary environment with a strong monetary policy and increased the base rate 14 consecutive times from December 2021 to August 2023 with the aim of controlling inflation. The Bank of England announced on the 21st September 2023 that the base rate of interest would remain at 5.25%. There are economic forecasts now considering, that to control inflation and return it to the Government target of 2%, the base rate of interest will rise to at least 6% in the calendar year for 2023. Although the rate of inflation has decreased, cost of living pressures remain significant and will continue to impact on both the costs of, and demand for, Council Services for the foreseeable future.
- 1.7 Members should be aware of the wider impact the macroeconomic environment is having in Local Government. Multiple local authorities have warned of pressures adversely impacting on their financial sustainability, despite the welcome increase in funding received in the Local Government Finance Settlement for this financial year. A lack of multi-year funding settlements and the sustained high level of inflation has severely impacted the level of underlying risk in the Council's financial position and made planning for the future more difficult due to the increased uncertainty around available funding.
- 1.8 Whilst the Council is not in a poor financial position in terms of its balance sheet at this point in time, and section 5 on reserves demonstrates this, it is clear that ongoing cost pressures make delivering the 2023/24 budget, and the future Medium Term Financial Strategy (MTFS), a difficult task. The addition of Star Chambers will support the delivery of budget reductions in 2022/23 through the continuous oversight and "critical friend" challenge nature in which they operate. However, without a "One Council" approach and a clear rationale around reserves being used to support transformation, change and a sustainably lower expenditure budget, Members will be asked to make more-and-more difficult decisions over the medium-term regarding service provision and levels of income generated locally.
- 1.9 Any decision to use reserves, above those approved at Budget Council, would require Section 151 Officer approval. Reserves should not be an alternative to undelivered budget reductions. The Section 151 Officer is of the view that, as at Period 05 reporting, additional use of reserves

is not necessary to support the revenue budget, subject to the identified management actions taking full effect in 2023/24.

- 1.10 Executive Cabinet should note that in future reporting the consideration in paragraph 1.9 may change as management actions are confirmed as on-track or not, and needs arise around managing the leisure estate following the decision by Active Tameside to close 3 sites, and responding to wholly unforeseen items of expenditure that cannot be constrained within the contingency budget envelope in 2023/24.

2. FORECAST 2023/24 REVENUE OUTTURN POSITION AT MONTH 5

- 2.1 The underlying Month 5 adverse variance is £13.021m, which represents an adverse movement on the month 4 underlying position of £11.674m.
- 2.2 As a result of the worsening underlying position, mitigating actions needed to mitigate the underlying variance have increased to £13.057m (previously were £11.710m in month 4). The overall month 5 projected net underspend remains at £0.036m, which is being held at this position in light of the level of risk within the position and the reliance on a significant level of management action.
- 2.3 Table 1 gives a breakdown of the position for each Directorate showing both the underlying risks and management actions, leading to the reported position and shown against the month 4 position.

Table 1: Month 5 forecast monitoring position

Forecast Position	Revenue Budget	Month 5 Forecast	Underlying Variance	Management Action	Net Variance	Net Variance Month 4	Change in Variance
	£m	£m	£m	£m	£m	£m	£m
Adults	41.591	46.019	4.428	(4.428)	(0.000)	0.000	(0.000)
Children's Social Care	55.537	59.776	4.239	(3.939)	0.300	0.300	(0.000)
Education	8.743	9.538	0.795	(0.550)	0.245	0.245	0.000
Schools	0.000	0.000	0.000	0.000	0.000	0.000	0.000
Population Health	14.320	14.232	(0.088)	0.000	(0.088)	(0.088)	0.000
Place	29.546	34.451	4.904	(3.990)	0.914	0.767	0.147
Governance	13.554	13.817	0.262	(0.150)	0.112	0.112	0.000
Resources	58.105	56.586	(1.519)	0.000	(1.519)	(1.372)	(0.147)
Totals	221.397	234.418	13.021	(13.057)	(0.036)	(0.036)	0.000

- 2.4 To provide further detail to the table above, the following table shows the movement in the underlying position for month 5 compared to month 4, which is then described in more detail for each Directorate in sections following the table.

Table 2: Month 5 movement in underlying position

Forecast Position	Revenue Budget	Month 5 Forecast	Month 5 Underlying Variance	Month 4 Underlying Variance	Change in Variance
	£m	£m	£m	£m	£m
Adults	41.591	46.019	4.428	2.949	1.479
Children's Social Care	55.537	59.776	4.239	4.239	(0.000)
Education	8.743	9.538	0.795	0.795	0.000
Schools	0.000	0.000	(0.000)	0.000	(0.000)
Population Health	14.320	14.232	(0.088)	(0.088)	0.000
Place	29.546	34.451	4.904	4.889	0.015
Governance	13.554	13.817	0.262	0.262	0.000
Resources	58.105	56.586	(1.519)	(1.372)	(0.147)
Totals	221.397	234.418	13.021	11.674	1.347

Adult Services – Underlying overspend of £4.428m, adverse movement of £1.479m

- 2.5 The Adults Services Directorate has a forecast overspend against budget in 2023/24 of £4.428m, which is an adverse movement of £1.479m on the underlying forecast from period 4.
- 2.6 Residential and nursing care home placements continue to be the predominant cost driver of the forecasted overspend before management actions. There is a net forecast increase of £0.749m in existing placement costs since period 4. An additional 2 care home placements per week to 31 March 2024 have also been included in the forecast at a net cost of £0.635m. Permanent placements are 12% greater than the budgeted number at this period end (790 compared to 706). In addition short stay placements are currently significantly greater than the budgeted level (142 compared to 25). However, there is intensive work underway to review the forecast volume of expected placements as referenced at period 4, the outcome of which will be reported at a later date.
- 2.7 There continues to be a forecast reduction to the level of financially assessed service user contributions to home care / support at home care together with day care packages. The forecast has reduced by £0.149m when compared to the income budgets and value reported at period 4 and further analysis is being undertaken.
- 2.8 Demand management continues to be a key challenge for the Directorate. Recruitment to 6 Assessor posts is expected to be confirmed during October together with dates of commencement in post. The total full year cost of the 6 posts is expected to be £0.246m and is funded from base budget through the conversion of existing posts. The primary responsibility of the postholders will be to review care packages with an annual net cost in excess of £0.050m. There will only be a part year effect in the current financial year of any cost reductions that will be realised via these package reviews, with the whole year benefit realised from 2024/25. For context, an estimated 5% reduction in the net cost of these placements would equate to an approximate annual cost saving of £0.635m. The value of the part year impact will be significantly impacted by the start date of the 6 staff, however, the full year impact will take effect in 2024/25.
- 2.9 Alongside demand management, there is also some fragility in the provider market with retention and continuity of care staff being a key issue. Further details on the issue will be provided in future reports if there are no ongoing improvements.
- 2.10 Recruitment of the directorate workforce has been reviewed with the implementation of a revitalised approach. Since April 2023, the directorate have successfully recruited 23 social workers and 21 support workers. There are 5 social worker posts still requiring permanent recruitment which will be promoted at a recruitment roadshow on 3 October 2023. The

successful recruitment of permanent postholders will enable the termination of agency workers that are currently backfilling vacant roles. The difference with Agency costs versus permanent employees can total £11k-£17k additional pressure on budgets. The directorate anticipate that any subsequent new appointments will commence in November/December (subject to satisfactory pre-employment clearance) alongside the termination of agency worker engagements. A further recruitment roadshow is being scheduled for up to 10 full time equivalent support worker posts. Recruitment to these posts will then enable a reduction to the payment of additional hours which are covering these vacancies within the service on a weekly basis.

- 2.11 The demand for accommodation with support in the borough is now outstripping supply. There are currently 55 service users on the directorate waiting list, with 8 service users identified for transition in the next two years from Children's Services requiring 24-hour support who need to be planned for. In addition, the number of service users with a learning disability or mental health needs living in costly out of borough places has recently increased, primarily due to the lack of in borough supported accommodation capacity to meet need. There is a real concern that without increasing capacity such costly placements will very quickly become long term and the opportunity to return service users to supported living in the borough at a reduced cost will be delayed. An opportunity has arisen to secure 5 in borough private sector landlord properties together with the provision of care support for 6 out of borough service users. A report is due to be considered by the Executive Cabinet on 25 October 2023 to approve this proposal which will also include the cost savings that will be realised. It is essential that the Council is able to secure related property opportunities efficiently as they arise.
- 2.12 The forecast underlying overspend of £4.428m is proposed to be partially mitigated by the use of additional grant funding that has been awarded to the directorate and earmarked integration reserve funding; a total sum of £3.013m.
- 2.13 On 27 September 2023 the Executive Cabinet approved acceptance of additional workforce market sustainability and improvement fund grant funding of £1.755m from the Department of Health and Social Care. The grant funding (in accordance with the related grant conditions) will support forecast in year expenditure on the :
- Existing increase in fee rates paid to adult social care providers
 - Increase of adult social care workforce capacity and retention
 - Reduction of adult social care waiting times
- 2.14 On 8 September 2023 the Council received notification from the Department of Health and Social Care (DHSC) that it had been allocated an indicative grant sum of £0.541m to support urgent and emergency care during the 2023/24 winter period. Proposals for use of the funding are to be submitted to the Department by 29 September 2023 with approval due by 13 October 2023. It is again proposed that the grant supports in year expenditure included in the period 5 forecast in accordance with the supporting grant conditions. Acceptance of the grant will be included in a subsequent monitoring report once approval of the Council's proposed use is confirmed by DHSC.
- 2.15 Further grant funding was awarded to the Council at the end of the previous financial year on 29 March 2023 by DHSC. The non-ring fenced sum awarded was £0.130m and has been carried forward to the current financial year whilst the proposed use was determined. The grant was awarded to support the streamlining of local authority Adult Social Care Assessments, the costs of which are again included in the period 5 forecast. It is therefore proposed to accept and use the grant to support this expenditure.
- 2.16 It is envisaged that the Council will be subject to a review and assessment of Adult Social Care functions by the Care Quality Commission in the current financial year. On 21 September 2023 the DHSC awarded the Council £0.027m to support related expenditure in

preparation for this assessment which is included in the period 5 forecast. It is again therefore proposed to accept and use the grant to support this related expenditure.

- 2.17 The Council has an earmarked reserve sum £0.815m at 1 April 2023 to support Adult Social Care and NHS integration initiatives, an example of which is the support at home care model. Standard home care (paid to providers at £19.50 per hour) and support at home (paid to providers at £21.14 per hour) aims to support residents to live more independently. The ambition is to increase the level of weekly support at home hours provided (currently at 52% of the total hours provided), which although at a higher hourly cost, works out to be more cost effective overall due to a reduction in the care package hours required, as well as supporting residents to live independent lives. The model also includes the provision of some duties that were previously provided by separate home visits by NHS District Nurses.
- 2.18 The forecast additional cost of the support at home model when compared to the standard home care model that is included in the period 5 forecast is £0.560m. It is proposed that this estimated expenditure is financed by the afore referenced earmarked integration reserve. Further work will be required with NHS colleagues to determine the financing arrangements of the additional costs of the model from 1 April 2024.
- 2.19 The forecast remaining net adverse variance after the allocation of in year grant allocations and use of the earmarked integration reserve is summarised in table 3 below:

Table 3

	£'m
Period 5 - Adverse Forecast	4.428
Market Sustainability Improvement Fund - Workforce Grant	(1.755)
Streamline of Local Authority Adult Social Care Assessments Grant	(0.130)
Urgent and Emergency Winter Care Grant - Indicative	(0.541)
Care Quality Commission Assessment Grant	(0.027)
Earmarked Reserve - Adult Social Care and NHS Integration Initiatives	(0.560)

Net Adverse Forecast

1.415

- 2.20 Further work is required on the in-year and future year management actions required to ensure a balanced budget is delivered by 31 March 2024 as the partial mitigating use of grant and earmarked reserve fund allocations are predominantly non recurrent. The main focus will be the review of care packages in excess of a net annual cost of £0.050m once recruitment to the 6 assessor posts has been concluded together with the review of care home short stay placements and the estimated demand for these placements.

Children's Services – Social Care – Underlying overspend £4.239m, nil movement from P4.

The overall position on Children's services is an underlying variance of £4.239m, which is unchanged from the position as at month 4. Whilst there has been an adverse movement on the placements budget as a result of 3 additional children in External Residential placements, this has been offset by additional grant income received in respect of Youth Justice and Unaccompanied Asylum Seeking Children (UASC) funding, the latter due to an increase in the number of UASCs in the borough. The pressures are mitigated by management actions of £3.939m, resulting in a reported net adverse variance of £0.300m.

- 2.21 The overall forecast overspend is driven by high-cost external placements for Cared for Children which is forecast to overspend by £4.856m. This relates both to the overall number and the increasing cost of each placement with external residential placement numbers currently at 78, compared to 67 at the start of the financial year and 75 last month, with the net increase of 11 having an in-year impact of £3.621m. The forecast is conservative in assumptions around length of stay per placement by young person, and the new senior

leadership team is undertaking an extensive review of placements beginning with a Pareto approach looking at the top 20% in cost to determine if there is a potential to support the young person into a lower cost alternative over a period of time. In addition, the average weekly cost of placements is currently £5,958, compared to £5,510 at the same point last year, representing an increase of over 8%. This is on top of the Newton Europe report to the Association of Directors of Children’s Services (ADCS) that highlighted Children’s Placements increased in costs by over 60% in the previous 3 years and there is a national sufficiency shortage of appropriate placements to meet complex and/or escalating need.

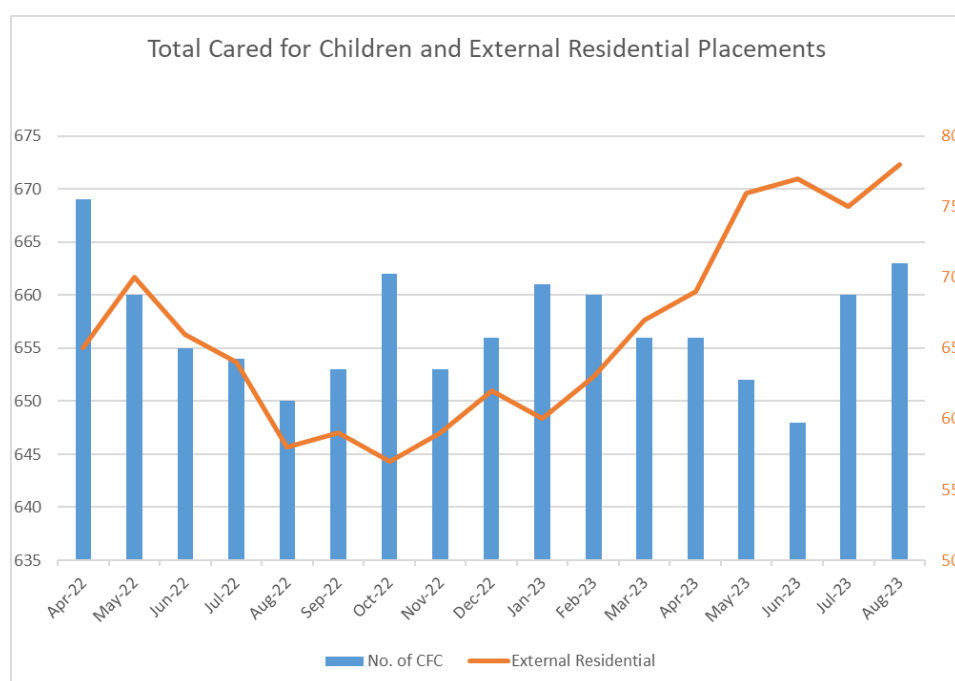
2.22 Table 4 below shows that whilst 17 over 18’s have had their Semi Independent placement ceased, this has been offset by 19 additional placements in the 16-17 age range. Table 3 also shows the growth of 12 Independent Foster Placements in 0 to 15 year olds, and external residential placements have risen by 11 in 5-15 year olds.

Table 4: Age Profile of External Placements

Age Profile	Semi Independent		Independent Foster Placement		External Residential Homes	
	Apr-23	Sep-23	Apr-23	Sep-23	Apr-23	Sep-23
0 to 2	0	0	1	2	0	0
3 to 4	0	0	3	8	0	0
5 to 10	0	0	47	51	4	6
11 to 15	0	0	64	66	40	49
16 to 17	28	47	23	22	23	23
18+	33	16	1	0	0	0
	61	63	139	149	67	78

2.23 Graph 1 shows that Cared for Children numbers were trending downwards from the start of this financial year, however they have now increased each period since June 2023.

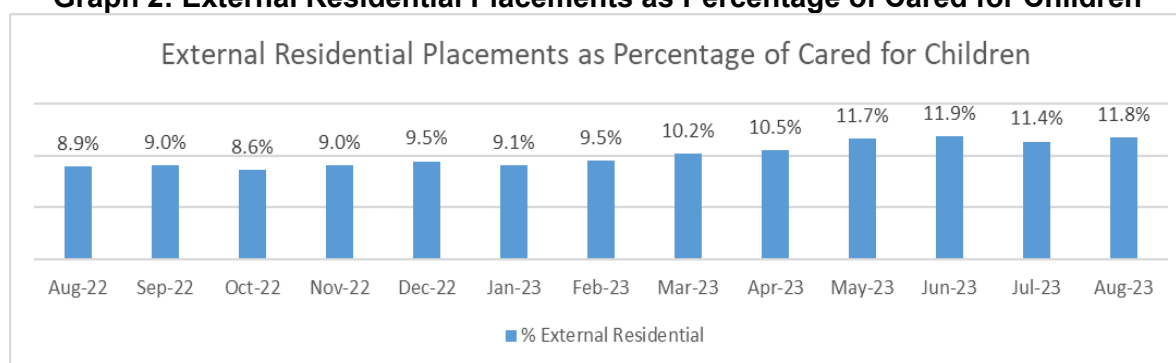
Graph 1: Total Cared for Children and Children in External Residential Placements



2.24 The number of external residential placements has risen sharply this calendar year, after a period of falling numbers, leading to a greater proportion of the total client base being in external residential placements, the proportion is presented in Graph 2. As the graph shows,

the proportion has increased from 8.9% in August 2022 to 11.8% at August 2023.

Graph 2: External Residential Placements as Percentage of Cared for Children



2.25 Management mitigations include achieving additional NHS and DSG contributions towards the health and education elements of care packages of children above those already forecast, which would increase income by £2.666m based on a review of the current list of Children and Young People, whose placement would attract tripartite funding. A project to rehouse 6 UASC's from transition flats to alternate accommodation, freeing up flats for residential step downs, would reduce this in-year forecast by a further £0.831m. The full year effect of this action would be £1.662m. Regular meetings focusing on the highest cost placements have identified future potential step downs of £0.191m in year. These will continue to be monitored and reviewed through the financial year.

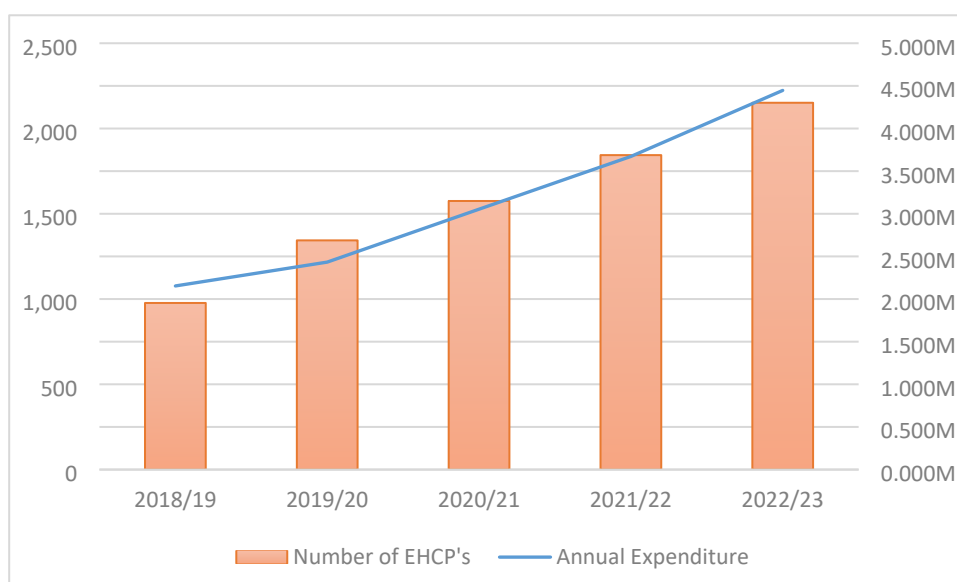
2.26 A separate review is being undertaken to consider stepping down as many 16 and 17 year olds as possible from external residential to internal semi-independent placements. An analysis of current numbers based on a notional step-down date of 1 October 2023 would provide a saving of up to £2.5m in 2023-24. This figure is based purely on financial analysis and subject to significant potential change depending on the specific circumstances associated with the individual young people, together with sufficiency of suitable alternate placements, and actual step-down dates.

Education – Underlying overspend £0.795m, nil movement from P4

2.27 The underlying variance is an overspend of £0.795m, which represents a nil movement from Period 4. After management actions of £0.550m, there is a net variance of £0.245m. There is a net £0.328m overspend on Special Education Needs and Disability (SEND) Transport in the current year due to higher than expected levels of Education Health Care Plans including transport requirements.

2.28 Expenditure for SEN transport has increased steadily with the sustained increase in EHCPs over the past 5 years, which is shown in Graph 2. Further review will be undertaken of the ongoing level of transport needs associated with young people with EHCPs and the different options available to support their journeys to school.

Graph 2: EHCP Numbers and SEN Transport Expenditure 2018/19-2022/23



2.29 There is an increase this year in the use of Associates on the Education Psychology Service for the delivery of statutory assessments £0.297m. £0.071m is due to increased time in court contesting school absence notices and an increase in home to school transport eligibility/demand.

2.30 The pressures in this area have been reduced through forecast increases in penalty notice income for unauthorised absences following the holiday period, currently projected to be £0.107m. When new SEND transport routes are implemented in September 2023, additional pupils are expected to increase route group efficiencies, reducing average cost per pupil and lead to a potential reduction in forecast expenditure of £0.250m. However, early indications are that the number of approved pupil applications will exceed original expected volumes so any route group efficiencies may be offset by greater than expected increases in demand. A more accurate reflection is anticipated in October 2023 once the application evaluation process has concluded.

Place – Underlying overspend of £4.904m, adverse movement of £0.015m

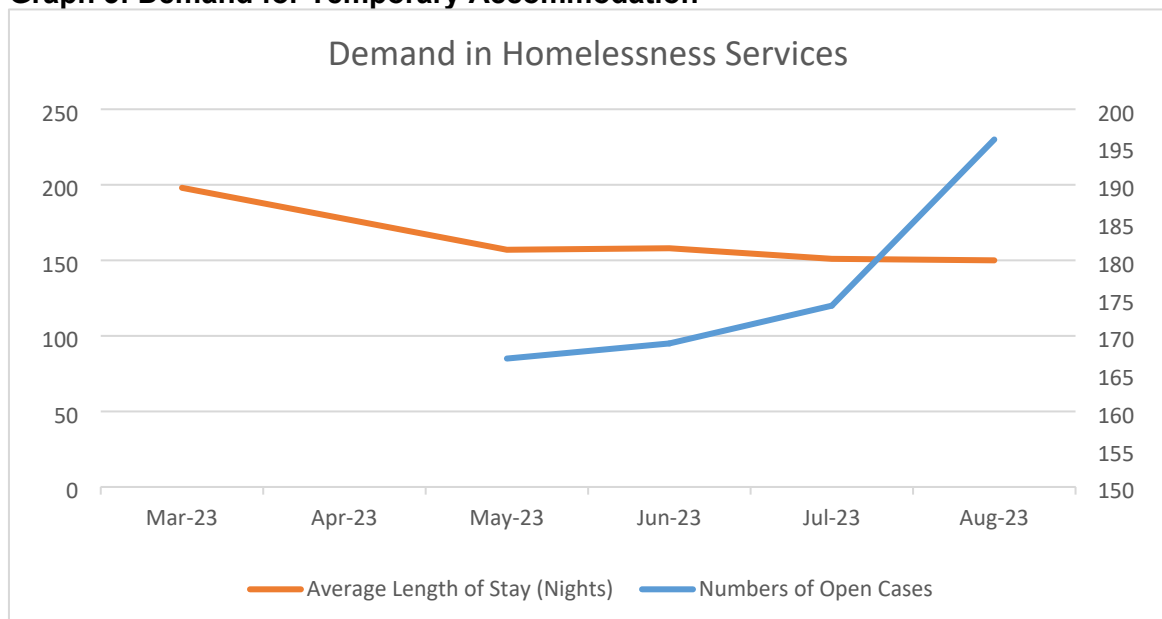
2.31 The forecast position as at period 4 is showing a net overspend of £4.904m for the Place Directorate. This is an adverse movement on the underlying position from period 4 of £0.015m. As detailed in the period 4 report, the forecast is driven by cost and demand pressures continuing from 2022/23, savings not delivered in prior years and expected non-delivery of savings in 2023/24. The net position includes some significant underspends on staffing which are helping to partially mitigate the gross overspends in pressure areas. Significant management action is needed to reduce the potential overspend in this financial year. Management action for period 5 has reduced to £3.990m.

2.32 The key areas of overspend driving this position are as follows:

2.33 **Corporate Landlord £2.060m** – The majority of the overspend relates to Facilities Management costs where the forecast expenditure of £4.490m exceeds the available budget of £2.677m, resulting in an overspend of £1.813m. The budget has been reduced in each of the last 3 years in respect of savings which have not been delivered. The 2023/24 savings target is £0.920m of which £0.258m is confirmed to be delivered in year due to service capacity issues which have resulted in delays in progressing asset rationalisation. An interim Asset Rationalisation Surveyor and Head of Facilities Management are both now in post which should enable some of the planned savings to be delivered in year. Contractual uplifts are also based on RPI and are expected to exceed the budgeted allowance for inflation in 23/24 by £0.200m. In addition, continuing shortfalls on rental income are resulting in a budget pressure of £0.204m combined with net forecast overspends across other budget lines.

2.34 **Homelessness £1.679m** – Continuing increases in demand for services is resulting in higher forecasted costs for temporary accommodation, with demand further increasing between months 4 and 5. Over the past 6 months, both the numbers of temporary accommodation placements and the average nightly rate has increased by 5%. Over this period, the number of placements has increased, as shown in Graph 3, and although the service has worked to reduce the average length of stay, the ongoing increases in numbers demonstrates the continued growth in demand. Further growth in demand in this financial year has been included in the forecast. The chart below shows the progress made on reducing the average length of stay which is being offset by a large increase in numbers of cases.

Graph 3: Demand for Temporary Accommodation



2.35 At period 3, a reduction in the forecast on temporary accommodation was factored in on the basis that the service expected to secure nomination rights on 101 properties during this financial year, starting in October. This would enable the same number of families to move on from temporary accommodation resulting in reduction of 12,270 temporary accommodation nights. There is however a risk that nomination rights secured by the Council will not be to this level. Work is ongoing with the Housing Strategy team to fully review the likely levels of nomination rights and the implications on current forecasted levels of temporary accommodation. Further updates will be provided as this review is completed and the financial implications understood.

2.36 **Waste & Fleet £0.644m** – Staffing costs exceed the net budget due to the efficiency factor not being delivered as the use of agency staff to cover sickness and other absences is required to ensure service continuity. A service redesign has recently been approved and the financial implications of this will be reported in future periods. Vehicle repairs and maintenance continue to exceed budget due to a combination of increased prices and the aging fleet. Prior year savings in respect of three weekly collections and charging for replacement bins are not delivering the full saving originally anticipated.

2.37 **Income £0.927m** – Shortfalls in income across a number of service areas are resulting in pressures totalling £0.927m. This includes: Estates (£0.480m) due to shortfalls in rental income across the estate; Markets (£0.293m) where income from rents and services charges are not increasing at the same rate as increases in expenditure, and this is after the recent Executive Cabinet decision to increase the rent and service charges levied; and Planning (£0.154m) which continues to experience shortfalls in income from building regulation fees and planning fees.

2.38 Other areas of the Directorate are forecasting small under and overspends with staffing vacancies and underspends on supplies and services contributing to mitigate the total overspend position.

2.39 Further Management Actions of £3.990m are identified as a target in table 1 above, to reduce the reported overspend for the Directorate. These mitigating actions include (but are not exhaustive): a review of vacancies and planned recruitment to identify any further staffing savings, review of grant funding to ensure grant utilisation is maximised, consideration of maximising staff capitalisation against major projects where they meet the definition of capital expenditure and work within the service to identify alternative savings to meet shortfalls. However, the nature and scale of the forecast overspend the Place Directorate means there is a significant risk that management actions will not deliver mitigations at the scale or pace required to bring the overspend down in the short term, particularly in respect of the pressures being experienced in Homelessness and due to the time and notice periods required to realise substantial savings following asset rationalisation.

Resources – Underlying underspend £1.519m, favourable movement of £0.147m

2.40 Resources has an underlying forecast underspend of £1.519m, which represents a positive movement of £0.147m on the month 4 position. This is due to a combination of an increase of £0.059m in additional interest income, together with an improvement of £0.088m on the Digital Tameside staffing forecast.

Contingency budget virements to fund specific earmarked pressures

2.41 As part of the 2023/24 budget, approved at budget council, earmarked budgets were set aside in Contingency for specific known pressures. The proposal is that budget is transferred from earmarked Contingency to the Place directorate to fund the following pressure;

(a) Corporate buildings energy costs, £0.819m. As a result of national energy cost rises.

3. SAVINGS PROGRAMME 2023/24

3.1 The overall small projected underspend against the revenue budget, explained above, includes achieving planned 2023/24 savings. Detail of the delivery status of savings by Directorate of the 2023/24 savings programme, included within the original budget, is shown in Table 5 overleaf.

Table 5: Saving Programme in 2023/24 Budget at month 5

2023/24 Budget Reductions	Opening Target £m	Red £m	Amber £m	Green £m	Achieved £m
Adults	2.550	0.000	0.782	1.079	0.689
Children's Social Care	3.652	1.695	1.267	0.690	0.000
Education	0.318	0.050	0.212	0.056	0.000
Population Health	0.155	0.000	0.000	0.000	0.155
Place	2.103	0.778	0.785	0.213	0.327
Governance	0.000	0.000	0.000	0.000	0.000
Resources	1.776	0.000	0.000	1.245	0.532
Quality and Safeguarding	0.000	0.000	0.000	0.000	0.000
Total	10.554	2.523	3.046	3.283	1.702
%		23.9%	28.9%	31.1%	16.1%

3.2 At month 5, 47.2% (46.2% at month 4) of the programme is considered to be achieved, or on track to be delivered, a total of £4.985m. A further £3.046m is classed as Amber, with some issues or delays in delivery with £2.523m or 23.9% (4.6% at month 4), with serious concerns

of delivery (red rated savings are detailed in Table 7 overleaf). These savings are discussed with Directors and their management teams as part of the STAR Chamber process that has been implemented to give a key focus on savings delivery. To track changes to savings delivery each month a comparison between month 4 and month 5 is shown in Table 6 below.

Table 6: Change in Savings Programme RAG rating between month 4 and 5

	Opening Target £m	Red £m	Amber £m	Green £m	Achieved £m
Month 4 Total	10.554	0.481	5.200	3.884	0.989
Month 5 Total	10.554	2.523	3.046	3.283	1.702
Change from M5 to M4		2.042	(2.154)	(0.601)	0.714
Month 4 %		4.6%	49.3%	36.8%	9.4%
Month 5 %		23.9%	28.9%	31.1%	16.1%

Table 7: Red rated savings at month 5

Directorate	Scheme	Savings Ref No.	Opening Target £m	Red £m
Children's	SEND Transport - Review transport policy and thresholds	CH3	0.050	0.050
Children's	A further reduction in the number of Children requiring Care of the Local Authority	CH10	0.450	0.450
Children's	Remodelling of Early Help Offer	CH11	0.865	0.665
Children's	Repurposing and opening St Lawrence Road	CH15	0.702	0.300
Children's	Management Review	CH20	0.280	0.280
Place	Industrial Estate Unit Rental / Change in Use - Plantation Unit 7	PL6	0.130	0.047
Place	FM / TAS Contract Review	PL7	0.320	0.090
Place	Street Lighting - reduction in energy consumption (reduce brightness)	PL10	0.108	0.034
Place	Reduction in parking enforcement contract costs based on reduced service spec (based on 5% reduction)	PL15	0.030	0.030
Place	Estates Rationalisation	PL3	0.920	0.577
Total			3.855	2.523

4. DEDICATED SCHOOLS GRANT

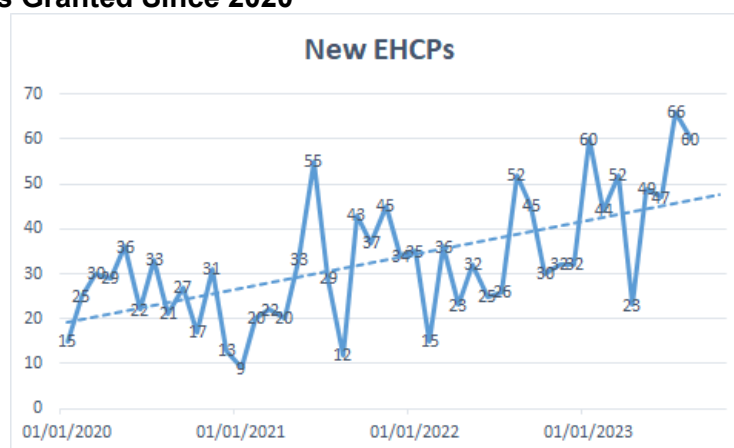
- 4.1 The in-year forecast position on the overall DSG is a deficit of £5.317m, details are included in Table 8 below. The deficit predominantly relates to the ongoing pressure on High Needs. Further information is included in paragraphs 4.2 to 4.4. The cumulative DSG position at the end of 2022/23 was a deficit of £3.306m. The forecast closing balance on the DSG at the end of the current financial year is £10.127m. There is currently a statutory override in place for the DSG from 2023-24 to 2025-26 which means any DSG deficits are not included in the council's main revenue budgets. Beyond this period any deficit would become recognised in the council's revenue position.

Table 8: Dedicated Service Grant (DSG) 2023/24 Forecast Deficit

DSG Funding Blocks	DSG Settlement 2023-24 at July 2023 £m	Block Transfer 2023-24 £m	Revised DSG 2023-24 £m	Forecast Distribution /Expenditure 2023-24 £m	Forecast (Surplus) / Deficit £m
Schools Block	(201.052)	0.694	(200.358)	200.349	(0.009)
Central School Services Block	(1.249)	0	(1.249)	1.249	0
High Needs Block	(36.910)	(0.694)	(37.604)	43.480	5.876
Early Years Block	(18.062)	0	(18.062)	17.511	(0.550)
Total	(257.273)	0	(257.273)	262.589	5.317

- 4.2 There is a forecast surplus of £0.010m on the Schools Block. This relates to unallocated growth, with the final growth allocation based on pupil numbers at the October 2023 census point and the figures will be updated once this has been finalised and may impact on the current surplus forecast. It is proposed that any surplus on the Schools Block contributes to the DSG deficit.
- 4.3 The forecast in-year deficit on the High Needs Block is expected to be £8.070m, which reduces to £7.376m with the £0.694m transfer from the Schools Block. In previous years, the Block Transfer would represent 0.5% (the maximum allowable in the Regulations), however this year it has been held at 0.354% to ensure no school would be capped following changes to indicators that build their budgets under the National Funding Formula (NFF).
- 4.4 The High Needs updated forecast reflects the unprecedented level of growth during the summer term which exceeded the original estimate. Following the summer term the estimate for the in-year deficit on the High Needs Block has increased from £2.845m to £7.376m. £3.031m of this relates to growth in the number of EHCP's. Graph 4 shows the number of monthly EHCPs granted since 2020. The table below the graph shows the number of EHCP requests that are approved, over the past 4 years.

Graph 4: EHCPs Granted Since 2020



Reason	2020	2021	2022	2023
Assessment proceeded	70.62%	73.23%	73.16%	84.47%

- 4.5 When forecasting growth for 2023-24, it was assumed that the rate of new EHCP's granted would continue at the same rate as 2022-23, which was an average of 37 new EHCP's each month. This was used as the rate was already considered high and expected to start stabilising after 2-3 years of rapid growth. The first five months of 2023-24 have averaged 49

EHCP's per month, 12 higher than forecast. The growth in EHCP's has been in all provision types. The majority of growth has been in the mainstream sector, with notable increases in Post 16 and Independent settings. This is projected to continue for the rest of the academic year, however as special schools are already at capacity, the proportion of high cost independent placements is predicted to increase. A further £1.889m of in-year growth is estimated for the Autumn and Spring terms.

- 4.6 Although not included in the reported position above, it should be noted that work is underway to confirm the education element of cost within these packages of care within Childrens Social Care, as part of the review of tripartite funding. Although the DSG already contributes to these care placements, this work will quantify the scope of High Needs Block contributions to Children Social Care placements and ensure fair funding.
- 4.7 In this context, the goal of Tameside's involvement with the DBV programme is to identify sustainable changes to the local SEND system that can drive high quality outcomes for children and young people with SEND, and the DBV programme has culminated in an evidence-based grant application to assist the implementation of those changes.
- 4.8 Following root cause analysis and triangulation via case reviews, surveys and various deep dives Transitions and Early Years have been identified as two high impact areas which the DBV Plan has focused on. In early August 2023 the DfE DBV Programme Board gave indicative approval to Tameside's Stage 1 DBV implementation plan and revenue funding request of £1m. DfE feedback on the plan stated that it demonstrated an aspiration to deliver significant improvements to services for children and young people with SEND alongside significant financial benefits over the next 5 years.
- 4.9 The Early Years Block is currently forecasting a surplus of (£0.550m). The surplus mainly relates to 3 and 4 years olds and a reducing birth rate. Estimates suggest that universal uptake is reducing but there is a shift in extended entitlement where there is an increase in uptake. There will be a further funding adjustment based on the Spring Term census data and if the estimates are accurate, there will be a clawback of funds which will reduce the anticipated surplus.

5. CAPITAL PROGRAMME

- 5.1 There are no changes to the Capital Programme reported this month, with detailed monitoring and review taking place as part of the month 6 monitoring position. Table 9 below presents the capital expenditure by service area, which shows services are projecting expenditure of £12.913m less than the current capital budget for the year, of which £12.909m was agreed to be reprofiled as part of the Month 3 budget monitoring report to Cabinet.

Table 9 – Capital Expenditure by Service Area

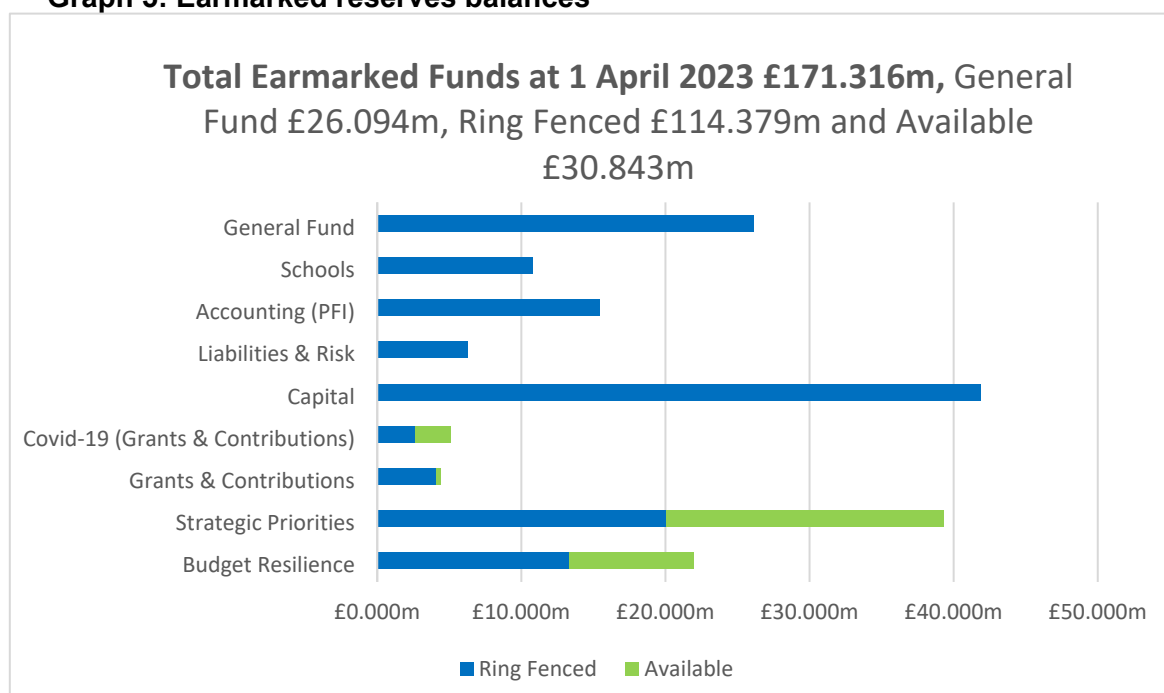
	2023/24 Budget	Actual to Date	Projected Outturn	Projected Outturn Variation	Reprofiling to / (from) future years	Projected Variation after reprofiling
	£m	£m	£m	£m	£m	£m
Place: Property, Development and Planning						
Investment & Development	21.262	0.583	11.659	(9.603)	(9.604)	0.001
Corporate Landlord	0.993	0.007	0.992	(0.001)	-	(0.001)
Vision Tameside	0.073	-	0.073	-	-	-
Active Tameside	0.102	0.103	0.103	0.001	-	0.001

Place: Operations and Neighbourhoods						
Engineers	4.725	0.129	4.721	(0.004)	-	(0.004)
Ops & Greenspace	1.370	0.065	1.404	0.034	-	0.034
Fleet Replacement	0.826	-	-	(0.826)	(0.826)	-
Estates	0.008	0.007	0.008	-	-	-
Childrens Social Care						
Education	22.235	1.016	22.209	(0.026)	-	(0.026)
Children	2.863	0.040	1.222	(1.641)	(1.641)	-
Resources						
Digital Tameside	-	-	-	-	-	-
Adults Social Care						
Adults	4.745	0.367	3.907	(0.838)	(0.838)	-
Governance						
Governance	0.032	0.006	0.023	(0.009)	-	-
Total	59.234	2.323	46.321	(12.913)	(12.909)	0.005

6. EARMARKED RESERVES

- 6.1 The value and categories of earmarked reserves as at 1 April 2023 are summarised below in Graph 5. Whilst the overall level of earmarked reserves held by the Council remains strong, most of these earmarked reserves are committed, with only £30.843m not committed outside of the general fund balance of £26.094m. No uncommitted reserves have been used in this year to date.
- 6.2 Reserves balances excluding the General Fund balance and schools-related reserves are £132m. Reserves balances including the General Fund balance and schools-related reserves total £171m.

Graph 5: Earmarked reserves balances



7. RECOMMENDATIONS

7.1 As stated on the front cover of the report.

Report To: EXECUTIVE CABINET

Date: 25 October 2023

Executive Member / Reporting Officer: Cllr Jacqueline North – First Deputy (Finance, Resources & Transformation)
Ashley Hughes – Director of Resources (Section 151 Officer)

Subject: MEDIUM TERM FINANCIAL STRATEGY UPDATE

Report Summary: The report presents an update to the Council's Medium Term Financial Strategy (MTFS). The position has improved since the previous report in June 2023 due to the submission of budget reduction proposals from all service areas along with a 2% reduction in the prevailing rate of Consumer Price Index (CPI) inflation. The rate of CPI released in September 2023 was 6.7%.

The MTFS is part of the financial framework for the Council. A key purpose of the MTFS is to ensure that future budgets will be balanced. It is a statutory requirement for the Council to set a legally balanced budget for the immediate financial year ahead, and it is best practice to have a medium-term view over a 3-5 year period.

The current MTFS has an imbalance of resources to expenditure of £33.819m to 2028/29, with £9.651m still required to be found for 2024/25. In the last update, the MTFS imbalance was £39.783m to 2028/29, with £12.889m required to be found for 2024/25.

The "budget gap" in the MTFS as a percentage of the 2023/24 net expenditure requirement of £221.397m is 4.4% for 2024/25 and 15.3% to 2028/29. The thinktank Localis are running events on local government finance at all political party conferences this year, with their findings suggesting many authorities in the UK are planning for budget reductions of up to 15%. This is in line with the Council's current MTFS gap.

The Council's budget monitoring report for Month 5 is also presented to this Executive Cabinet and it contains significant levels of risk in services with activity-driven costs such as social care, homelessness and highway maintenance. The current forecast out-turn for 2023/24 is £0.036m underspent. The underlying risk is £13.021m. The worst case scenario is that the full risk value converts to an overspend, requiring the use of reserves to balance the General Fund position. Within the MTFS position, there is an assumption of pressures requiring funding based on activity and demand in 2023/24, however there is an expectation that services proactively work on demand management and "flattening the curve", and this is assumed within the MTFS.

In the worst case scenario, where demand management fails and no budget reductions are delivered and the Council has to support a balanced budget through reserves use, the Council will exhaust its reserves in 2027/28. For the avoidance of doubt, that is 4 years from the date of this report to Executive Cabinet.

As reserves fall, it will become more and more difficult for the Section 151 Officer to fulfil their statutory duties and confirm that budget estimates are robust and that reserves and balances are suitable and appropriate to maintain fiscal sustainability.

The scale of the challenge the Council is facing to set a legally balanced budget in the face of rising demand for social care and homelessness services, inflation against the backdrop of over a decade of reducing financial envelopes since 2010 (the Council has delivered over £180m of reductions in that time) is as acute as it was in the period 2010-2013. Members of the Executive Cabinet and Full Council need to be under no illusions that balancing the budget whilst maintaining service delivery will require difficult decisions over the forthcoming months and years.

Recommendations:

That Executive Cabinet APPROVES:

- 1) The recommendation to not pool Business Rates across Greater Manchester for 2024/25 and authorises the Section 151 Officer to respond to the Department for Levelling Up, Housing and Communities to that effect.
- 2) The updated MTFS for 2024/25 to 2028/29.

That Executive Cabinet NOTES:

- 3) The impact of additional inflationary and demand pressures on the MTFS from 2024/25 to 2028/29.
- 4) The impact of the proposed budget reductions on the MTFS from 2024/25 to 2028/29.

Policy Implications:

Budget is allocated in accordance with Council.

Financial Implications:

As contained within the report.

(Authorised by the Section 151 Officer & Chief Finance Officer)

Legal Implications:

(Authorised by the Borough Solicitor)

The Local Government Act 1972 (Sec 151) states that “every local authority shall make arrangements for the proper administration of their financial affairs...” The council has a statutory responsibility to ensure that it operates with sufficient reserves in place. The legislation does not stipulate what that level should be, rather that it is the responsibility of the Council’s Section 151 officer to review the level of reserves and confirm that the level is sufficient. Reserves by its very nature is finite and so should only be drawn down after very careful consideration as the reserves are unlikely to be increased in the short to medium term.

Risk Management:

Associated details are specified within the presentation.

Failure to properly manage and monitor the Council’s budgets will lead to service failure and a loss of public confidence. Expenditure in excess of budgeted resources is likely to result in a call on Council reserves, which will reduce the resources available for future investment. The use and reliance on one off measures to balance the budget is not sustainable and makes it more difficult in future years to recover the budget position.

Background Papers:

Background papers relating to this report can be inspected by contacting : Stuart Munro, Senior Finance Manager

 e-mail: stuart.munro@tameside.gov.uk

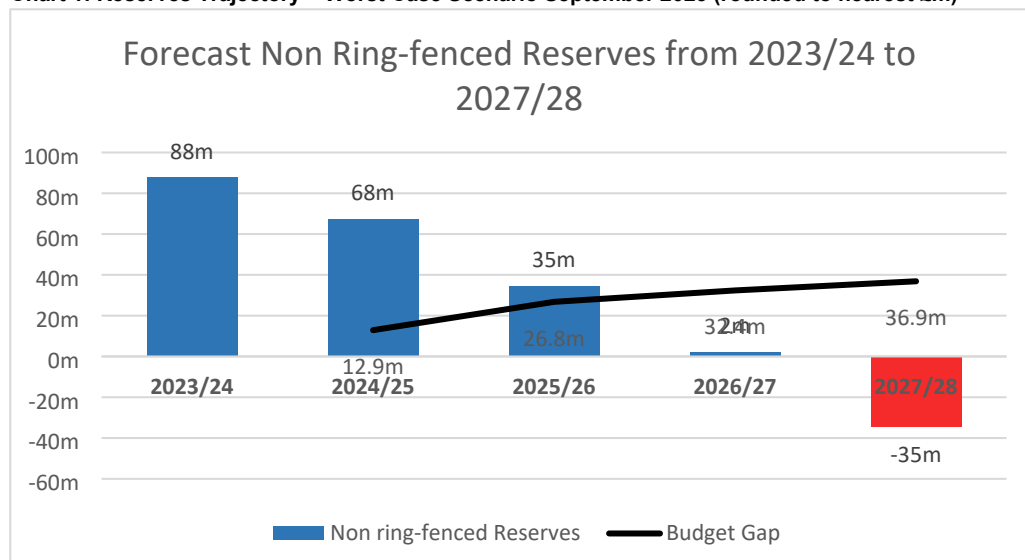
1. INTRODUCTION FROM THE S151 OFFICER

- 1.1 The report updates the Council's Medium Term Financial Strategy (MTFS). The MTFS sets the framework for a balanced and sustainable revenue budget, which is a key duty for the Council.
- 1.2 The MTFS was presented as part of the 2023/24 budget proposals and a further update was then provided in July 2023, which included a financial projection for the years from 2024/25 to 2028/29.
- 1.3 The July 2023 MTFS update budget included revised forecasts for future years. Projected new budget reductions to find were £12.889m in 2024/25, increasing to £39.783m in 2028/29. Whilst this report demonstrates that this has now reduced in quantum, the budget imbalance between expenditure requirements and resources remains significant at £9.651m for 2024/25 and £33.819m for the period 2024/29.
- 1.4 The MTFS comprises a net expenditure requirement which is required to be balanced by the Council's General Funding, consisting of Council Tax, Business Rates, General Grants and, in exceptional circumstances, earmarked reserves.
- 1.5 The Council is facing a significant challenge to its financial position. Nationally, Local Government is facing significant challenge, with a number of local authorities reporting acute difficulty in balancing their budgets with others being subject to Government intervention. For context, Local Government funding declined by almost one third between 2010 and 2021. A report to the Public Accounts Committee in February 2022 ([Local Government Finance system: Overview and challenges \(parliament.uk\)](#)) found that Local Authorities' income was £8.4bn less in real terms than in the previous decade. Whilst recent settlements have been more reasonable, much of the funding was meant for the Adult Social Care reforms and an expectation Councils would raise more locally through Council Tax.
- 1.6 Locally, the Council has made over £180m of budget reductions since 2010. When setting the 2023/24 budget, analysis showed that the impact of austerity had led to a real terms reduction of £688 per household in Tameside since 2010. Translated into a percentage, this is a 24% reduction in Tameside's real terms spending power since 2010.
- 1.7 This MTFS report should be considered in line with the Month 5 position reported to Executive Cabinet. At Month 5 reporting on the 2023/24 financial position, the Council has an underlying risk of £13.021m currently forecasted to be mitigated through the use of appropriate management actions and the use of reserves already committed for expenditure from prior decisions.
- 1.8 Much of the underlying risk is driven by factors already widely discussed at Executive Cabinet. Demand and complexity of need in Adults and Children's Social Care mean there's more people requiring critical services and that the service is more specialist, intense and bespoke to the individuals. Care provider markets are fragile, locally and nationally. Tameside has seen supplier failure in adults residential and nursing provision and severe constraints on fostering provision for our Looked After Children. On top of this, the Council is seeing rising demand for homelessness support services and temporary accommodation with open cases doubling since April 2023. The macro-economic environment around inflation, with CPI currently at 6.7% but having peaked at 11.1% in October 2023, has increased the cost of everything the Council provides and does – from electricity and gas rising almost 100% to the price of pothole repairs tripling inside two years.
- 1.9 The Bank of England have responded to the inflationary environment, increasing base rates to 5.25% as of September 2023. This has increased mortgage rates, for homeowners and landlords alike, reducing available monies for our residents and businesses to expend in the local economy and maintain a home or premises. Whilst our residents feel the reduction in

their incomes, the higher interest environment does give the Council an opportunity to respond through Treasury Management to increase returns to support the budget for 2024/25. Treasury investment is, however, cautious in nature, and cannot be guaranteed as a long-term source of income as base rates rise and fall in response to the macroeconomic environment. As such, whilst there is an opportunity assumed in the MTFs for 2024/25, this assumption is unwound over future years reflecting assumptions in inflation.

- 1.10 The Council remains financially resilient, all things being equal, and this is outlined in Section 9 of this report where the Council’s performance on the CIPFA Financial Resilience Index and as measured by the Office for Local Government (Oflog) are detailed. This is reflective of the Council’s approved Reserves Strategy and controlled approach on financing its Capital Strategy. However, the Council cannot be complacent as to the scale of the challenge. The financial gap in the MTFs of £33.819m represents 15.3% of the 2023/24 net budget after refreshed assumptions following the announced Trailblazer Deal which extended the 100% business rates retention scheme for a further decade (the MTFs had assumed this to drop back to the 50% retention scheme from 2024/25), Council Tax flexibility to 4.99% was assumed and a significant reduction in contingency budgets of £6m was applied.
- 1.11 The Council has used its reserves to manage the position in prior years. Reserves are by their nature finite and only able to be used once. It is not prudent or appropriate to rely on them to meet deficits in budget setting unless they are smoothing the path to financial sustainability and the Council has sufficient balances and reserves to do so. The Council’s balance sheet holds £160m of earmarked reserves, of which £87.5m is considered unringfenced, i.e., it does not have specific conditions against it; this is not the same as being committed for use. The Month 5 report on the financial position holds more details on reserves. Unringfenced reserves are the General Fund Balance of £27.5m, Corporate Priorities Reserve of £43m and Budget Risk Reserve of £17m.
- 1.12 In the worst of cases, should the Council be unable to mitigate the underlying risk position in 2023/24 and not deliver any budget reductions to close the MTFs gap, i.e., use reserves to set a balanced budget, it will exhaust all of its unringfenced reserves by 2027/28. This is demonstrated in the chart below.

Chart 1: Reserves Trajectory – Worst Case Scenario September 2023 (rounded to nearest £m)



- 1.13 It is imperative therefore, that the Council takes sufficient and appropriate steps to deliver a robust and balanced budget over the medium term. To this end, the Section 151 Officer has engaged external support from IMPOWER Consulting to provide independent check and challenge, detailed benchmarking and delivery planning support to underpin the MTFs and to provide upskilling to the organisation. Furthermore, the Section 151 Officer recommends

that the Council develops a Transformation Unit and Corporate Project Management Office (PMO) as an enhancement to the already existing Improvement Team.

- 1.14 Whilst delivering a financially sustainable future for Tameside is challenging, it is not a challenge that is insurmountable. The Council is likely to face difficult decisions around levels of fee charging, service provision and whether it should cease delivery of some services in its entirety. These decisions are not ones that Members should be taking lightly, and Council should be assured on the deliverability of any proposal that reduces net expenditure before agreeing that the proposals it wishes to adopt. Through its Star Chamber process, and strong and independent Scrutiny functions the Council can assure itself that the budget it sets for 2024/25 and beyond is both robust and deliverable.

2 BACKGROUND

- 2.1 In line with recent history, the Council is not likely to receive detailed information on funding allocations through the Local Government Finance Settlement (LGFS) until late Autumn 2023, with the last 2 years' information coming in the December.
- 2.2 The Government's planned review of local authority funding, the Fair Funding review, has been delayed until 2025/26 at the earliest. This leads officers to consider that the 2024/25 LGFS is very unlikely to be multi-year in nature. This lack of multi-year funding settlements make it harder for the Council to develop its MTFS as the level of uncertainty introduces greater risk into the planning process.
- 2.3 Taking the above into account with the wider financial picture for Local Government, and the potential for commercial income being delayed beyond 2027/28 leaves the Council's MTFS weaker than might have previously been planned for without taking positive and proactive steps to manage the financial position.
- 2.4 At the July meeting of the Executive Cabinet, the 2024/25 revenue budget and financial projection up to 2028/29 (previous MTFS) as shown in Table 1 below was presented.

Table 1: 2024/25 Revenue Budget and Previous MTFS:

	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Net Expenditure Requirement	243.789	261.574	272.828	282.814	291.369
Resources	(230.900)	(234.806)	(240.457)	(245.960)	(251.586)
Budget reductions to find - cumulative	(12.889)	(26.768)	(32.371)	(36.854)	(39.783)

- 2.5 Table 1 shows that additional savings needed to be found in future years, in order to balance the budget.
- 2.6 The Net Expenditure Requirement comprises the Council's running costs and related income streams. Running costs relate to employees and contractors but also includes Capital Financing Costs. Capital Financing costs are incurred when the Council borrows to fund the Capital Programme: an amount has to be aside each year from the revenue budget to repay a proportion of the borrowing alongside interest charges on the borrowing. The Net Expenditure Requirement is net of income from fees and charges, revenue grants and interest earned.
- 2.7 Resources comprises: Council Tax, Business Rates, General Grants and transfers from unallocated earmarked reserves. All these funding sources are general and do not have to be matched against a specific type of expenditure.
- 2.8 Council Tax and Business Rates are collected and managed in a ring-fenced account (called

the Collection Fund). The Council's share of Council Tax and Business Rates is paid out of the Collection Fund over to the Council's revenue budget. The Council's share is always agreed prior to the start of each financial year, so the amount paid over is always an estimate. The estimate includes the Council's share for the next financial year as well as an adjustment for projected variances relating to previous estimates (the Collection Fund surplus/deficits).

- 2.9 The General Grants mainly relate to the redistribution of funding between Local Authorities and are linked to Business Rates. Tameside Council's ability to raise Business Rates is less than its assessed funding need according to national formulas, so receives an additional Top Up grant.
- 2.10 General Funding can be increased by transferring unallocated balances from earmarked reserves. However, earmarked reserves can only be used one. Further, a previous review of the robustness of the Council's reserves identified a requirement to increase the Council's General Fund balance. This increase is incorporated within the MTFS update.

3 NET EXPENDITURE REQUIREMENT UPDATE

- 3.1 Since the July presentation, the macro-economic environment continues to be very challenging, albeit with some favourable movement. Inflation is currently running at 6.7%, the inflation rate assumption in the July 2023 MTFS update was 8.5%. This reduction in inflation has had an impact on inflationary pressures assumed in the MTFS for commissioned goods and services.
- 3.2 An assumption for demographic and other service pressures has been included in the latest MTFS update. Demographic pressures include assumptions on Adults, Children's and temporary accommodation, and other service pressures.
- 3.3 The assumptions around employee-related cost pressures arising from the Local Government pay award have remained unchanged since the July update. This is based on the latest employers' offer, which is in line with the previous year, and equates to a 7% uplift on employee budgets in the Council.
- 3.4 Table 2a below shows the revised projections for pressures and fees & charges. There are no assumptions included for demographic or other service pressures beyond 2024/25 at this moment, however the reality is there will very likely be demography and complexity pressures in Adult Social Care, Children's Social Care and Education, and Homelessness. Further modelling of activity data is required to create a robust multi-year model for the MTFS.

Table 2a: Revision to total pressures

	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Opening Net Expenditure Requirement	221.397	247.821	262.468	273.811	283.887
Staffing related cost pressure	10.052	7.966	6.889	5.622	4.190
Demographic pressures	5.981	0.000	0.000	0.000	0.000
Inflationary pressures	17.527	7.848	5.232	5.232	5.232
Reduction in other fees/charges/income	0.000	0.000	0.000	0.000	0.000
Other service pressures	1.680	0.000	0.000	0.000	0.000
Total service pressures	35.240	15.814	12.121	10.854	9.423
Budget reductions	0.000	0.000	0.000	0.000	0.000
Budget resources redirected	(6.210)	0.000	0.000	0.000	0.000
New funding	0.000	0.000	0.000	0.000	0.000
Fees & charges	(2.606)	(1.167)	(0.778)	(0.778)	(0.778)
Total service reductions	(8.816)	(1.167)	(0.778)	(0.778)	(0.778)
Net Expenditure Requirement	247.821	262.468	273.811	283.887	292.532

- 3.5 The inflation assumptions are shown in Table 2b below, with Table 2c outlining the revised budget gap before identified budget reductions.

Table 2b: Inflation Assumptions

Annual Inflation Assumptions MTFS Update	2024/25	2025/26	2026/27	2027/28	2028/29
Non-Pay Inflation (%)	6.70%	3.00%	2.00%	2.00%	2.00%
Pay Inflation (%)	7.00%	5.00%	4.00%	3.00%	2.00%
Fees & Charges Uplift (%)	6.70%	3.00%	2.00%	2.00%	2.00%

Table 2c: Updated Budget Gap 2024-2028

	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Net Expenditure Requirement - July 2023	243.789	261.574	272.828	282.814	291.369
Net Expenditure Requirement - Revised	247.821	262.468	273.811	283.887	292.532
Increase in Budget reductions to find	(4.032)	(0.894)	(0.983)	(1.073)	(1.162)
Budget reductions to find - July 2023 (Table 1)	(12.889)	(26.768)	(32.371)	(36.854)	(39.783)
Revised Budget reductions to find - cumulative	(16.921)	(27.662)	(33.354)	(37.927)	(40.945)
Revised Budget reductions to find - incremental	(16.921)	(10.741)	(5.692)	(4.573)	(3.018)

4 PROPOSED BUDGET REDUCTIONS 2024/25 TO 2028/29

- 4.1 Since the July 2023 update to Executive Cabinet, services have been working on proposals to deliver suitable and sufficient budget reductions to bridge the gap in 2024/25 and to support delivery of the MTFS to 2028/29. To date, £7.270m of budget reductions have been proposed that are costed and considered by officers to be deliverable. These are outlined in Table 3 below.

Table 3: Budget reductions proposals by directorate

Budget reduction proposals by Directorate Base case	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	Total £m
Budget reductions to find	(16.921)	(10.741)	(5.692)	(4.573)	(3.018)	(40.945)
Adults	(0.798)	0.000	0.000	0.000	0.000	(0.798)
Children's	(1.562)	0.000	0.000	0.000	0.000	(1.562)
Place	(0.322)	(0.481)	0.000	0.000	0.000	(0.803)
Resources	(2.815)	0.750	0.375	0.000	0.000	(1.690)
Governance	(0.022)	0.000	0.000	0.000	0.000	(0.022)
Population Health	(0.144)	(0.150)	0.000	0.000	0.000	(0.294)
Cross cutting	0.000	0.000	0.000	0.000	0.000	0.000
Carry forward proposals	(1.608)	(0.250)	(0.100)	0.000	0.000	(1.958)
Total	(7.270)	(0.131)	0.275	0.000	0.000	(7.126)
Remaining budget reductions to find	(9.651)	(10.610)	(5.967)	(4.573)	(3.018)	(33.819)

- 4.2 The remaining imbalance between expenditure and resources is £9.651m, with all services continuing to work up ideas to close the gap. The Council will be supported in this by IMPOWER Consulting who are retained to provide independent challenge and ideation and support. Future updates on the MTFS to the Executive Cabinet will include the outcomes and outputs of the value added by IMPOWER to our internal processes.

- 4.3 The current proposals will be presented to Star Chambers in October 2023 for Member challenge and confirmation of deliverability by officers as part of the assurance process to set a balanced budget.
- 4.4 Additional Star Chambers are programmed in alternate months to capture ongoing proposals and ensure Executive Cabinet oversight outside the formal reporting process.

The Council provides additional independent scrutiny of the budget setting process through its Scrutiny Committees. Scrutiny is to receive a mid-year update on budget progress and the planning process in November 2023 and a further formal review of the proposed budget for 2024/25 in January 2024.

5 GENERAL FUNDING SOURCES FROM 2024/25 TO 2028/29

- 5.1 General Funding from 2024/25 to 2028/29 was updated in the July MTFS update. There are no changes to general funding in this MTFS update, the latest assumptions are detailed in Table 4. The December MTFS update will incorporate changes in the Council Tax Base (will be updated following CTB1 return due to Government on 13th October), Government funding decisions (following Local Government Settlement, expected Dec 2023) and any further changes to the macro-economic environment.

Table 4: Updated Financial Plan 2024/25 to 2028/29 (Revised MTFS).

Resources	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Revenue Support Grant	0.000	0.000	0.000	0.000	0.000
Business Rates	(112.806)	(115.062)	(117.478)	(120.063)	(122.704)
Council Tax	(116.135)	(119.510)	(122.979)	(125.897)	(128.882)
Collection Fund (surplus)/deficit	(1.750)	0.000	0.000	0.000	0.000
Use of reserves	(0.209)	(0.234)	0.000	0.000	0.000
Total resources	(230.900)	(234.806)	(240.457)	(245.960)	(251.586)

- 5.2 **Council Tax** income makes more than 50% of General Funding. Council Tax income is the result of the Band D Tax Rate multiplied by the Band D Equivalent Tax Base.
- 5.3 The Band D Tax Rate is set by the Council. It is a single average measure calculated according regulations (the Local Authorities Calculation of Council Tax Base Regulations 2012). The starting point is the number of households in the district, approximately 105,000. These household numbers are then expressed as equivalent numbers by adjusting for discounts and the Council Tax Reduction (CTR) scheme.
- 5.4 There are further adjustments. Each household is allocated a Council Tax Band from A to H, based on dwelling values. Each Council Tax Band incurs a Council is a fixed ratio of Band D, for the purposes of Council Tax Billing. These fixed ratios are shown in Table 5a overleaf:

Table 5a Council Tax Bands fixed ratios to Band D

Band	Property Value at 1 April 1991	Fixed ratio to Band D
A	Up to 40,000	6/9ths
B	40,000 - 52,000	7/9ths
C	52,001 - 68,000	8/9ths
D	68,001 - 88,000	9/9ths
E	88,001 - 120,000	11/9ths
F	120,001 - 160,000	13/9ths
G	160,001 - 320,000	15/9ths
H	Over 320,000	18/9ths

5.5 It is because each band is a fixed ratio to Band D that household numbers, after discounts and CTR, can be averaged out as the Band D Equivalent Tax Base.

5.6 Council Tax income is summarised in Table 5b below:

Table 5b: Council Tax Assumptions in MTFS

	2024/25	2025/26	2026/27	2027/28	2028/29
Initial Band D Equivalent Tax Base (250 growth)	66,084.00	66,334.00	66,584.00	66,834.00	67,084.00
Collection Rate (Bad Debt Adjustment)	96.5%	97.0%	97.5%	97.5%	97.5%
Band D Equivalent Tax Base	63,771.1	64,344.0	64,919.4	65,163.2	65,406.9
Band D Council Tameside Precept*	1,557.99	1,594.23	1,631.20	1,668.89	1,707.34
Band D Adult Social Care Precept**	263.13	263.13	263.13	263.13	263.13
Band D Council Tax	1,821.13	1,857.37	1,894.33	1,932.02	1,970.47
Updated MTFS (Table 3)	116.135	119.510	122.979	125.897	128.882

* 2.99% in 2024/25 and 1.99% afterwards

** 2% in 2024/25 and no increase after then

5.7 Table 5b shows an assumption of a 2% increase in the Adult Social Care (ASC) Precept in 2024/25. Current Government announcements allow for ASC precept increases in 2024/25, although not for subsequent years.

5.8 The MTFS also allows for a 2.99% increase in Tameside's precept for 2024/25, which again is allowed for by Government announcements. The percentage increases for the years after 2024/25 remain at 1.99% in line with current referendum limits.

5.9 The increase in the Tameside's precept increase and the ASC increase have a cumulative impact, so increasing Council Tax income for the years after 2024/25.

5.10 Table 5b also shows an increase to the Band D Equivalent Tax Base based on current growth projections provided through Planning and Exchequer.

5.11 **Business Rates and Related Grants** are the other main element of General Funding. The MTFS for this area is shown in Table 5c overleaf:

Table 5c: Updated Business Rates and Related Grants

Business Rates and Related Grants	2024/25	2025/26	2026/27	2027/28	2028/29
	£m	£m	£m	£m	£m
Business Rates	(56.613)	(57.745)	(58.958)	(60.255)	(61.581)
Section 31 Grants	(23.141)	(23.604)	(24.100)	(24.630)	(25.172)
Top Up Grant	(33.052)	(33.713)	(34.421)	(35.178)	(35.952)
Sub-total Business Rates Grants	(112.806)	(115.062)	(117.478)	(120.063)	(122.704)

5.12 For background, Business Rates are calculated via a chargeable rate multiplied against the rateable value of commercial premises. The chargeable rate (multiplier) is set by the Government. Rateable Value is set by the Valuation Office Agency (VOA).

5.13 There is a related Top Up Grant because from 2013/14, the Business Rates system was also used to redistribute funding between Local Authorities. Funding is redistributed based on the difference between a Local Authority's assessed funding need and its ability to collect tax. Because Tameside's assessed need is higher than its tax collection, it will receive a projected Top Up grant of £33.052m in 2024/25.

- 5.14 There are Section 31 Grants because the Government helps businesses by providing discounts (called reliefs) and freezing the chargeable rate (the multiplier). These decisions reduce Tameside's share of Business Rates. It receives compensation via additional Section 31 Grants.
- 5.15 There are a number of postponed reforms of the way assessed need is calculated and the workings of the Business Rates system. These changes are now expected from 2025/26. The revised MTFs assumes that these changes will not make Tameside Council worse off.
- 5.16 **Business Rates Pooling**, the Council received an invite on the 5 September 2023 from the Department for Levelling Up, Housing and Communities (DLUHC) to pool business rates for the forthcoming financial year, 2024/25. The financial benefit of pooling is the ability to retain the levy on growth above the Baseline Funding Level which is applied to tariff authorities, and would have otherwise been passed to Government. The Council was previously in the GM and Cheshire business rates pool until it was dissolved in 2020/21.
- 5.17 For 2024/25, the recommendation is not to pool business rates across Greater Manchester as there is no fiscal benefit to the Councils to do so. The previous pool which included the Cheshire authorities is not an option, as it is understood the Cheshire authorities also do not wish to pool in 2024/25.

6 REVISED GAP

- 6.1 The revised MTFs presents that the latest 2024/25 budget gap is £9.651m, increasing to £33.819m by 2028/29.

Table 6 – Updated MTFs

	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Opening Net Budget	221.397	240.551	255.066	266.685	276.761
Staffing related cost pressure	10.052	7.966	6.889	5.622	4.190
Demographic pressures	5.981	0.000	0.000	0.000	0.000
Inflationary pressures	17.527	7.848	5.232	5.232	5.232
Reduction in other fees/charges/income	0.000	0.000	0.000	0.000	0.000
Other service pressures	1.680	0.000	0.000	0.000	0.000
Total service pressures	35.240	15.814	12.121	10.854	9.423
Budget reductions	(7.270)	(0.131)	0.275	0.000	0.000
Budget resources redirected	(6.210)	0.000	0.000	0.000	0.000
New funding	0.000	0.000	0.000	0.000	0.000
Fees & charges	(2.606)	(1.167)	(0.778)	(0.778)	(0.778)
Efficiency factor	0.000	0.000	0.000	0.000	0.000
Total service reductions	(16.086)	(1.298)	(0.503)	(0.778)	(0.778)
Net Expenditure Requirement	240.551	255.066	266.685	276.761	285.405
Resources					
Revenue Support Grant	0.000	0.000	0.000	0.000	0.000
Business Rates	(112.806)	(115.062)	(117.478)	(120.063)	(122.704)
Council Tax	(116.135)	(119.510)	(122.979)	(125.897)	(128.882)
Collection Fund (surplus)/deficit	(1.750)	0.000	0.000	0.000	0.000
New Homes Bonus	0.000	0.000	0.000	0.000	0.000

Use of reserves	(0.209)	(0.234)	0.000	0.000	0.000
Other funding	0.000	0.000	0.000	0.000	0.000
Total resources	(230.900)	(234.806)	(240.457)	(245.960)	(251.586)
Budget reductions to find - cumulative	(9.651)	(20.260)	(26.228)	(30.801)	(33.819)
Budget reductions to find - incremental	(9.651)	(10.610)	(5.967)	(4.573)	(3.018)

7 SCENARIO PLANNING

7.1 **Worst case**, planning for the worst case scenario increases the 2024/25 budget gap to £23.188m, further increasing to £91.335m by 2028/29. The assumptions on the worst case scenario assume the same assumptions as the updated MTFS in table 7a, except for;

- Demographic and other service pressures have been baselined from 2025/26 onwards.
- Inflationary pressures are assumed to be at 8.5% in 2024/25, 4% in 2025/26 and drop to 2% in 2026/27 and future years.
- Budget reductions achieved are profiled to be worst case.
- No general or adult social care precept increase on Council Tax in 2024/25 or future years.

Table 7a – Worst case MTFS

	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Opening Net Budget	221.397	248.568	274.464	293.629	311.276
Staffing related cost pressure	10.052	7.966	6.889	5.622	4.190
Demographic pressures	5.981	5.981	5.981	5.981	5.981
Inflationary pressures	21.835	11.560	5.138	5.138	5.138
Reduction in other fees/charges/income	0.000	0.000	0.000	0.000	0.000
Other service pressures	1.680	1.680	1.680	1.680	1.680
Total service pressures	39.548	27.186	19.688	18.420	16.989
Budget reductions	(2.882)	0.450	0.250	0.000	0.000
Budget resources redirected	(6.210)	0.000	0.000	0.000	0.000
New funding	0.000	0.000	0.000	0.000	0.000
Fees & charges	(3.285)	(1.740)	(0.773)	(0.773)	(0.773)
Efficiency factor	0.000	0.000	0.000	0.000	0.000
Total service reductions	(12.377)	(1.290)	(0.523)	(0.773)	(0.773)
Net Expenditure Requirement	248.568	274.464	293.629	311.276	327.493
Resources					
Revenue Support Grant	0.000	0.000	0.000	0.000	0.000
Business Rates	(112.806)	(115.062)	(117.478)	(120.063)	(122.704)
Council Tax	(110.615)	(111.609)	(112.607)	(113.030)	(113.453)
Collection Fund (surplus)/deficit	(1.750)	0.000	0.000	0.000	0.000
New Homes Bonus	0.000	0.000	0.000	0.000	0.000
Use of reserves	(0.209)	(0.234)	0.000	0.000	0.000
Other funding	0.000	0.000	0.000	0.000	0.000
Total resources	(225.380)	(226.905)	(230.085)	(233.093)	(236.157)
Budget reductions to find - cumulative	(23.188)	(47.559)	(63.544)	(78.184)	(91.335)
Budget reductions to find - incremental	(23.188)	(24.371)	(15.985)	(14.640)	(13.152)

7.2 Best case, planning for the best case scenario reduces the 2024/25 budget gap to 6.734m, increasing to £21.487m by 2028/29. The assumptions on the base case scenario assume the same assumptions as the updated MTFS in table 7b, except for;

- Budget reductions achieved are profiled to be best case.
- Adult Social Care precept on Council Tax is forecast to continue at 2% in 2024/25 and future years.

Table 7b – Best case MTFS

	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Opening Net Budget	221.397	237.634	252.509	264.353	274.429
Staffing related cost pressure	10.052	7.966	6.889	5.622	4.190
Demographic pressures	5.981	0.000	0.000	0.000	0.000
Inflationary pressures	17.527	7.848	5.232	5.232	5.232
Reduction in other fees/charges/income	0.000	0.000	0.000	0.000	0.000
Other service pressures	1.680	0.000	0.000	0.000	0.000
Total service pressures	35.240	15.814	12.121	10.854	9.423
Budget reductions	(10.187)	0.229	0.500	0.000	0.000
Budget resources redirected	(6.210)	0.000	0.000	0.000	0.000
New funding	0.000	0.000	0.000	0.000	0.000
Fees & charges	(2.606)	(1.167)	(0.778)	(0.778)	(0.778)
Efficiency factor	0.000	0.000	0.000	0.000	0.000
Total service reductions	(19.003)	(0.938)	(0.278)	(0.778)	(0.778)
Net Expenditure Requirement	237.634	252.509	264.353	274.429	283.073
Resources					
Revenue Support Grant	0.000	0.000	0.000	0.000	0.000
Business Rates	(112.806)	(115.062)	(117.478)	(120.063)	(122.704)
Council Tax	(116.135)	(121.853)	(127.848)	(133.447)	(139.290)
Collection Fund (surplus)/deficit	(1.750)	0.000	0.000	0.000	0.000
New Homes Bonus	0.000	0.000	0.000	0.000	0.000
Use of reserves	(0.209)	(0.234)	0.000	0.000	0.000
Other funding	0.000	0.000	0.000	0.000	0.000
Total resources	(230.900)	(237.149)	(245.326)	(253.510)	(261.994)
Budget reductions to find - cumulative	(6.734)	(15.360)	(19.027)	(20.919)	(21.079)
Budget reductions to find - incremental	(6.734)	(8.627)	(3.666)	(1.892)	(0.160)

7.3 The following table 7c shows the range of the budget gap under the three different scenarios.

Table 7c – MTFS scenarios

	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m
Budget reductions to find - cumulative					
Base Case (table 6)	(9.651)	(20.260)	(26.228)	(30.801)	(33.819)
Worst Case (table 7a)	(23.188)	(47.559)	(63.544)	(78.184)	(91.335)
Best Case (table 7b)	(6.734)	(15.360)	(19.027)	(20.919)	(21.079)

8. NEXT STEPS AND PLANNED APPROACH

8.1 The Council will continue to review its MTFS and budget reductions programme going forward. The assumptions included within this report will be refreshed for the draft budget in December to take account of on available information on Government funding decisions as well as the macro-economic environment.

- 8.2 For 2024/25, targets were issued to Directorates based upon a percentage of net budget, which, combined, will deliver the projected budget reduction target for 2024/25. Over the period September to December, budget reduction proposals will be further developed to ensure robust delivery plans are in place and work will commence, with a view to maximising the full year effect of delivery in 2024/25. Priority will be placed on income maximisation across all service areas to reduce the burden on expenditure reductions, however there will be a need for efficiencies in costs alongside a genuine requirement to invest in transformation where the return on investment delivers long-term improvements in outcomes for residents in line with the Corporate Plan alongside recurrent reductions in costs that support the MTFs. Longer term projects will need to be identified now to support the budget gap reduction for 2025/26 onwards.
- 8.3 Star Chambers are in place in October to review all savings proposals to date, and for members of the Executive Cabinet to constructively challenge planning assumptions and levels of budget reduction being proposed.
- 8.4 The draft budget will then be presented to Cabinet in December for consultation in the Big Budget Conversation. Further independent check and challenge from Scrutiny Committees will take place in January, with feedback incorporated into the MTFs as necessary along with any updates in the final LGFS and finalised in February for Executive Cabinet to approve the budget it recommends to Full Council. These plans will then be monitored closely through the monthly monitoring and Star Chamber processes, now embedded in the monitoring cycle.
- 8.5 The Council plans further detailed work to be undertaken, including a review of its fees and charges policy alongside a detailed analysis of its Earmarked Reserves. In addition, the Authority is further reviewing the potential cost of introducing the Living Wage Foundation, the Real Living Wage on all commissioned services (it is already implemented in Adult Social Care contracts) and the Fair Cost of Care.

9 FINANCIAL RESILIENCE

- 9.3 A key priority of the MTFs is to align the Council's finances so they are sustainable for the long-term. CIPFA produces, for each Council, a Financial Resilience Index.
- 9.4 The key point from the Index, is that Tameside was assessed as towards the lower level of financial stress and this has been relatively consistent between 2016-17 and 2021-22. Other points were:
- Compared to other Councils, the social care ratio is toward the higher risk range, meaning that Tameside spends a higher proportion of its revenue budget on Children's Social Care.
 - The reduction in the Council's earmarked reserves in recent years as a proportion is slightly above other Councils, indicating a reliance on one-off funding.
- 9.5 The Office for Local Government (Oflog) have also recently published their performance framework for Local Authorities. The key outcomes for Tameside are similar to the CIPFA Financial Resilience Index but also cover a wider number of issues. The points are:
- Tameside's Social care spend as a percentage of its core spending power is significantly higher than for other Councils, at three quarters of its core spending power.
 - Tameside spends slightly less on borrowing costs compared to other Councils.
 - Tameside's ability to raise Council Tax, due to the proportion of dwellings in the lower valuation bands, is lower than the average of other Councils.

10 RECOMMENDATIONS

- 10.1 As stated on the front cover of the report.

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Agenda Item 6

Report to:	EXECUTIVE CABINET
Date:	25 October 2023
Executive Member:	Cllr Bill Fairfoull – Deputy Executive Leader Cllr Jacqueline North - First Deputy (Finance, Resources & Transformation)
Reporting Officer:	Allison Parkinson - Director of Children's Services
Subject:	DELIVERING BETTER VALUE IN SEND GRANT
Report Summary:	This report seeks approval to accept and spend a Department for Education (DfE) Delivering Better Value (DBV) in SEND grant in the sum of up to £1m to support the implementation of change to manage and mitigate identified cost drivers within the SEND high needs system.
Recommendations:	That Cabinet Approve, subject to the Director of Children's Services reviewing the standard grant conditions in consultation with the Director of Recourses and the Head of Legal, the acceptance of £1m DBV grant from the Department for Education to fund the implementation of SEND system change.
Corporate Plan:	The content of this report is integral to the delivery of the following priorities within the Corporate Plan: Starting well: <ol style="list-style-type: none">1. Very best start in life2. Aspiration and hope through learning and moving with confidence from childhood to adulthood3. Resilient families and supportive networks to protect and grow our young people4. Opportunities for people to fulfil their potential through work, skills and enterprise Enablers and ways of working: <ol style="list-style-type: none">1. A stronger prioritisation of well-being, prevention and early intervention2. An evidence led understanding of risk and impact to ensure the right intervention at the right time3. An approach that supports the development of new investment and resourcing models, enabling collaboration with a wide range of organisations
Policy Implications:	There are no policy implications to this report.
Financial Implications: (Authorised by the statutory Section 151 Officer & Chief Finance Officer)	Tameside's Dedicated Schools Grant (DSG) reserve has been in deficit since 2019-20 due to deficits on the High Needs Block. The DSG deficit at the end of the 2022-23 financial year was -£3.306m. The latest estimate for the DSG closing balance at the end of the 2023/24 financial year is -£8.627m. The council currently has a statutory override until 2025-26 allowing

the DSG deficit to be held on a separate reserve in the local authority's accounts. Once this override expires the DSG position will be reflected in Tameside's accounts.

The mitigating actions detailed in this report are targeted to provide the greatest financial benefit and put the council in the best position to bring the DSG into surplus by the end of 2025-26.

**Legal Implications:
(Authorised by the
Borough Solicitor)**

As set out in the main body of the report the grant has been awarded to assist the council's management of the deficit position.

The funding will have to be spent in accordance with the terms of the grant arrangement to avoid any potential claw back provisions.

Therefore, it is advisable for the terms of the grant to be reviewed before the agreement is entered into.

Risk Management:

A risk register will be maintained to ensure the key risks to implementing the various strands of the SEND DBV grant application.

There is a real risk that, even with effective mitigations in place, Tameside will not be able to balance the High Needs budget within current funding levels as demand throughout the SEND system continues to grow at pace.

Background papers:

Background papers relating to this report can be inspected by contacting Jane Sowerby Assistant Director of Education



e-mail: 0161 342 3247

1. INTRODUCTION

- 1.1 Over recent years, rising demand and other pressures have contributed to many local authorities accruing deficits on their Dedicated Schools Grant (DSG) and the Covid pandemic has exacerbated these issues. The overspend on Tameside's DSG High Needs Block budget (i.e. the funding that supports provision for pupils and students with SEND) has been increasing year-on-year to the point at which it has become unsustainable. The High Needs Block in-year deficit for the last three years is as follows:

2020-21 - £1,821,981

2021-22 – £1,972,933

2022-23 - £1,017,794

Early monitoring of the 2023-24 High Needs Block deficit position indicates that the deficit position is accelerating with the in-year deficit estimated to be £5.876m.

- 1.2 Consultation and engagement on plans to address the DSG High Needs deficit have been ongoing since Tameside submitted its Deficit Management Plan* in November 2020. Schools Forum have had oversight since the plan was first submitted.

* Local authorities with an overall deficit on their DSG account at the end of a financial year must be able to present a plan to the DfE for managing their future DSG spend.

The DBV programme sits alongside and complements existing and ongoing work across Tameside to manage the DSG High Needs deficit. A summary of the current budget position and indicative DSG mitigations was presented to Schools Forum on 19 January 2023 and 26 September 2023 (see background papers).

- 1.3 The DfE is running a range of intervention programmes to assist local authorities with deficits to achieve High Needs spend sustainability. Tameside was invited to participate in the DfE's Delivering Better Value in SEND support programme. Newton Europe, in collaboration with the Chartered Institute of Finance and Accountancy (CIPFA), have been commissioned by the DfE to deliver DBV and will support 55 local authorities and their local systems to identify the highest impact changes that each LA involved can make to better support their local children with SEND and make plans to implement those changes. The programme will place children and young people with SEND at the centre of the approach and decision-making. The implementation plans will build on existing initiatives and address the underlying challenges in each LA's high needs system.
- 1.4 Tameside joined the second tranche of local authorities starting DBV in December 2022. Like other LAs on the programme, Tameside have been involving parents and carers, schools / settings, local partners and our front line staff when designing our plan, whilst ensuring the programme is underpinned by a comprehensive data-driven and evidence-led diagnostic.
- 1.5 The DBV programme comprised of two initial modules:

Pre-engagement strategy period (December 2022 / January 2023): Tameside met with the DfE to discuss the programme in detail, the nature of support the DfE would be providing and how Tameside will best work with the DfE to drive and achieve the objectives of the programme. A comprehensive dataset of Education Health and Care Plans, provision and finance was provided as a baseline.

DfE provided a small grant to support data analysis and assurance at the beginning of this engagement phase and to ensure an effective delivery of phase 1.

Phase 1: 6 months – supported by a delivery partner (Newton), SEND Advisers and Financial advisers and involving a comprehensive diagnostic in order to:

- To identify sustainable changes that can drive high quality outcomes for children and young people with SEND
- To enable us to build an evidence-based application to the DfE for a grant to assist with the implementation of those changes.
- Build a strong, objective evidence base across a third of local authorities, which can be used to influence future national reform.

The stages of the diagnostic included:

- Local area stocktake (assessment of existing processes, plans, capability, relationships, etc.).
- Facilitation of key stakeholder engagement for each authority
- Data analysis and assurance.
- Identification of root cause/underlying cost drivers and mitigating solutions/reforms.
- Improvement plan including reform implementation critical path
- A quality assured DSG management plan.

- 1.6 DBV module 1 and 2 provided clear analysis of the demand, type of primary need and provision accessed by the current body of SEND pupils with an Education Health and Care Plan (EHCP). A high number of EHCPs start at key transition points, in particular Nursery to Reception and Primary to Secondary and a high number of new starts in maintained special schools at age 4 and 5. This puts pressure on Tameside specialist provision, which already accounts for £14m of the £30m high needs block spend, and in turn can lead to an increased number of placements at high cost, out of borough independent non-maintained special schools.
- 1.7 Through the analysis above and triangulation via case reviews, surveys and various deep dives the subsequent root cause analysis identified the following two high impact areas for our DBV Plan (see attached) to focus on:
- Inclusion – create an Inclusion Quality and Outreach Team, linked to existing Special Schools and Resource Provisions, and introduce a programme of training and workforce development (including parents and carers as appropriate).
 - Transitions – establish a new Early Years Assessment Centre with co-located wrap around services. The plan to improve the effectiveness and confidence surrounding transitions will also be supported through supporting the clearance of the backlog of annual reviews and identifying those pupils that may struggle at transition and providing early support.
- 1.8 The above high impact areas crossover with a range of SEND improvements that are happening outside of the DBV programme, in particular the redesign of SEND Teams, review of the Specialist Outreach Support Team and sufficiency of specialist school places.
- 1.9 In early August 2023, the DfE DBV Programme Board gave indicative approval to Tameside’s Stage 1 DBV implementation plan and revenue funding request of £1m. DfE feedback on our plan stated that it demonstrated an aspiration to deliver significant improvements to services for children and young people with SEND alongside significant financial benefits over the next 5 years.
- 1.10 Feedback from Newton Europe to DfE on the projected High Needs Block deficits across DBV and Safety Valve local authorities, after mitigating actions have been taken, indicates that deficits remain extremely high over the coming years. In response, DfE introduced a new Stage 2 late in the DBV Programme. Stage 2 required local authorities to identify significant additional opportunities to achieve a sustainable in-year balanced position as soon as possible and have committed to the development of a robust DSG Management Plan to deliver these by the first quarterly monitoring meeting (December 2023). Tameside’s DBV Stage 2 submission is attached and covers the following four areas:

1. Contributions for Health and Social Care Provision
2. SEND Commissioning Capacity
3. Block Transfers within the Dedicated Schools Grant
4. Special School – PFI Contract Review

1.11 The anticipated reduction in costs to the High Needs Block is as follows:

Stage 1 bid - £5.2m - £7m cumulative reduction by 2027-28
Stage 2 bid - £1.7m pa

1.12 The implementation of the DBV plan will look to maximise the reduction in High Needs Block costs, however the demand and costs within the system continue to outstrip forecasts and a significant cumulative deficit of between £39.4m and £68.1m is estimated at the end of 2027-28.

1.13 Tameside's DBV application (stage 1 and 2) was assured by Tameside's DfE Monitoring Advisers and CIPFA before being presented to the DfE DBV Programme Board. Tameside's bid was given full approval on 15th September 2023. No specific conditions were applied to the approval of Tameside's DBV application and the Council awaits receipt of a Grant Offer Letter that will set out the standard grant conditions that apply to this grant award.

1.14 The Tameside Draft DBV Plan includes some quick wins that could be spent within autumn 2023 term but the majority of workstreams will start to spend from either January 2024 or September 2024. DBV grant is required to be spent by 31 March 2025 and workstreams will be governed through the SEND Inclusion and Partnership Board.

2 LEGAL BACKGROUND

2.1 The way in which local authorities account for DSG deficits has been altered by the Local Authorities (Capital Finance and Accounting) (England) (Amendment) Regulations 2020 (SI 2020 No 1212), made by what is now the Department for Levelling Up, Housing and Communities (DLUHC), which require DSG deficits to be held in a separate reserve in local authorities' accounts. There has been an extension to this accounting treatment for a period of 3 years taking this up to financial year 2025-26 after which the statutory override will be removed as there is expectation on LA's will have managed the deficit and secured a balanced DSG budget during this period.

2.2 There is a DfE requirement to produce a high needs deficit recovery plan, and as a consequence of the deficit position, Tameside has been invited to take part in the Department for Education's Delivering Better Value programme. Participation in this programme will be critical in supporting the Local authority (LA) in understanding the options available to manage the high needs deficit recovery plan and create a high needs system that meets demand in a way that is equitable and financially sustainable.

3 CONCLUSION

3.1 Work throughout the DBV programme will be critical to understanding the options available to managing the deficit and management recovery plan as well as understanding the grants available to us to support future change and implementation plans.

4 RECOMMENDATIONS

4.1 These are at the front of the report.

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DBV Stage 2 – Tameside MBC



Stage 2 : Tameside MBC

Additional grant criteria

Local Authorities have evidenced that, alongside the service delivery opportunities that the diagnostic has quantified, they have identified significant additional opportunities to achieve a sustainable in-year balanced position as soon as possible and have committed to the development of a robust DSG Management Plan to deliver these by the first quarterly monitoring meeting.

1. Stage 2 opportunity areas

Description of initiative	What it involves	Potential financial impact by 2026-27	Key risks to implementation and potential mitigations.
1. Contributions for Health and Social Care Provision	Individual Funding Panel and Continuing care Panel arrangements and attendance from all partners (including SEND) will be strengthened. This will ensure that all partners contribute appropriately to specialist packages of provision that are commissioned for individual children and for jointly commissioned services. Estimated financial impact based on 8 significantly high cost placements and an average 20% contribution from health and social care.	£153,000 pa and £459,000 over the three years 2024-25 – 2026-27). The 8 high cost placements range from £90,000 to £103,000 pa and therefore the assumption is that these are complex children that are highly likely to have health and social care need. The estimated 20% contribution is based on previous Local Authority experience of multi-agency funding panel arrangements (£ actual cost to health / social care / tripartite and 50 / 50 funding arrangements.	Health and social care system leaders do not engage with changes required to agree appropriate contributions and budget constraints across the system inappropriately impact on decisions. The Council's senior management will mitigate by active involvement in establishing the right processes / approvals and principals.

Stage 2 : Tameside MBC

Additional grant criteria

Local Authorities have evidenced that, alongside the service delivery opportunities that the diagnostic has quantified, they have identified significant additional opportunities to achieve a sustainable in-year balanced position as soon as possible and have committed to the development of a robust DSG Management Plan to deliver these by the first quarterly monitoring meeting.

1. Stage 2 opportunity areas

Description of initiative	What it involves	Potential financial impact by 2026-27	Key risks to implementation and potential mitigations.
<p>2. SEND Commissioning Capacity</p>	<p>The Council will build capacity in the Commissioning Team that will have a dedicated focus on SEND. This will enhance the uplift challenge that already happens and join up with Annual Reviews of pupils in INMSS / AP to undertake Quality Assurance visits to challenge value for money, outcomes and step down in fee levels. The capacity will also allow internal challenge at panel to ensure all alternatives are exhausted before an INMSS is considered.</p> <p>Health have provided £100k to implement a review of complex placements to ensure value for money, identify any step down opportunities and lessons learned re the journey that preceded the placement being made.</p> <p>The additional Commissioning resource will allow the Council to make full use of the North West SEND Flexible Purchasing System for INMSS.</p>	<p>£185,000 pa and £555,000 (cumulative over the three years 2024-25 – 2026-27)</p> <p>Based on experience of Tameside commissioners quality assurance work in other local authorities and the early Tameside work to challenge uplifts, it is assumed that on average fees for 15 pupils with the highest cost placements (ie 15% of INMSS cohort) could reduce by on average £10k pa (current fees range from £35k to £103k pa). It is also estimated that negotiating volume discount / block purchase arrangements with our high volume providers (ie we have 34 placements with one provider at £1.7m pa) could save £35,000 pa.</p>	<p>Council re-structuring / investment doesn't go ahead. Mitigation – a strong invest to save case is already building within Children's Services and DBV has strengthened the case.</p>

Description of initiative	What it involves	Potential financial impact by 2026-27	Key risks to implementation and potential mitigations.
3. Block Transfers	Ongoing annual requests to Schools Forum for approval to block transfer up to 0.5% of DSG to support the High Needs Block. This has been agreed for the last three years and indications are that this commitment will continue.	£1.069m in 24-25 and circa £3.26m over three years 2024-25 to 2026-27. Calculation based on 0.5% of the Schools Block element of the DSG.	Schools Forum do not approve the block transfer. Continuing to effectively report to Schools Forum at regular intervals throughout each financial year, including evidence of other routes to balancing the position has and will help School Forum agree block transfers.
4. Special School – PFI Contract Review	One of our special schools has a PFI style contract. A review of this contract will be undertaken to see if it represents value for money. It is envisaged savings could be found from this contract. This review will be undertaken with the support of the LEP, the outcome of which will be considered by Elected Members at Executive Cabinet.	£279,000 pa and £558,000 over two years 2025-26 to 2026-27). Calculation based on actual value of special school PFI contract.	Difficulties in ceasing existing agreement mitigated by continued communication with school in question and reports brought to Senior Leadership Team.
Total potential financial impact from taking forward initiatives		Potential financial impact 2024 -25 – 2026-27 = £4,832,000	

- The Council is fully committed to developing these initiatives and incorporate them, as appropriate, in a DSG Management Plan to be submitted in December 2023.

2. Actions taken to address any outstanding issues raised in Stage 1 of your grant application

- There is nothing outstanding from Stage 1.

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Tameside DBV Grant Application July 2023



What is the objective of the DBV programme?



DBV Programme Objective

Delivering Better Value (DBV) is a programme working to **identify and implement** local and national opportunities to **improve the outcomes** for children and young people with SEND

In order to achieve this we know;



The child or young person must remain at the centre of everything we do.



We must listen to the challenges from the perspective of those receiving support from the system.



Collaboration is key, with your neighbours, partners and the children and families you support.



Funding is a challenge and key source of frustration that should be considered throughout the planning.

Therefore the DBV programme is designing its support through 2 key approaches;

Short Term Help

To identify **sustainable changes in each LA** that can drive **high quality outcomes** for children and young people with SEND, and to support you in building an evidence-based **grant application** to assist the implementation of those changes

Informing Long Term Reform

Build an objective evidence base across a third of the sector, which can be used to:

- **Inform future policy** and reform
- Build a **national playbook** & share best practice
- Inform **future national programmes** of similar scale and intent



In March of 2022, the Department for Education published a report titled 'SEND Review: Right Place, Right Time'. It was released following an assessment/evaluation of the services and support available for CYP with SEND and in Alternative Provision (AP). The report proposed reforms to the SEND and AP systems to address the 4 key challenges identified so that CYP with SEND can receive high-quality support that meets their needs.

THE 4 KEY CHALLENGES



1. It's hard for children, young people, their families, and schools to get the support they need when they need it.



2. Children and young people with SEND don't always get the support they need to do as well as they could.



3. Too many children do not have a good experience of alternative provision.



4. The money used to support children and young people with SEND or who are in alternative provision is not always used in the best way.

WHAT IS CAUSING THESE PROBLEMS?



SEND and alternative provision services are different depending on where you live. The service that you get depends on where you live, not on what you need.



People do not always know what their job is to help children and young people with SEND which means they do not always do it properly.



Children and young people's needs aren't identified quickly enough. Too many children and young people get support too late.



Some children and young people who need an EHCP have to wait a long time to get one.



Too many children do not get the support they need in mainstream school and have to go to special or alternative provision when that might not be the best option for them.

Delivering better value: the diagnostic phase



The DBV programme is divided in 2 Phases:

Phase 1: Diagnostic Phase

Newton, CIPFA and SEND advisors will work alongside LAs and partners to support the diagnostic phase of the programme. The aim is to identify areas of improvement within the authority by realising the root causes of the problems. At the end of Phase 1, we want to ensure that each authority is set up with a clear plan to implement the changes identified to best support the needs of CYP with SEND. We will also help with drafting a evidence-based application for grant funding.

Phase 2: Making the Changes

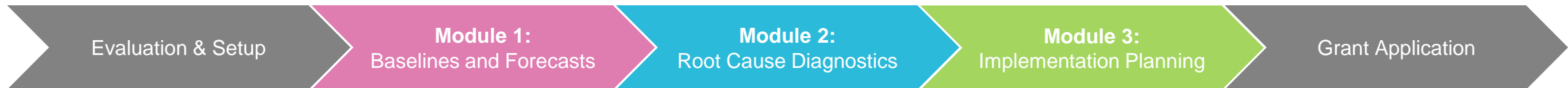
The realistic change transformation plan created as the end of Phase 1, will form the backbone of the change journey process that LAs will embark on process post the Diagnostic Phase. This will be the implementation period, the chance to drive the changes and make sure they are sustainably adopted.

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How are we approaching the Diagnostic Phase? :

We have developed 3 modules that we think are critical to ensure you can identify sustainable changes that will drive high quality outcomes for CYP, and support you in developing your grant application.





Diagnostic Identify Opportunities and what it will take to deliver them

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- Understand and quantify opportunities
- Understand how opportunities fit with existing and previous change programmes
- Understand enablers and risks to change
- Engage stakeholders to understand their perception of opportunities
- Develop a high level change plan

What are the expected Outputs of a DBV Diagnostic?

Module 1: Baselines and Forecasts

Outputs:

- Baselines of key performance and spend measures
- Refreshed future view of performance and spend if nothing changes
- Assured Opportunities
- Agreed formulas to calculate opportunities
- Prioritising diagnostic focus areas

Module 2: Root Cause Diagnostics

Outputs:

- Quantified opportunities in terms of spend and outcomes for CYP
- Refreshed future view of spend with impact of opportunities on spend
- Future view of when there will be impact on changes on measures
- Data backed evidence of opportunities

Module 3: Implementation Planning

Outputs:

- High level implementation plans
- Workstream summaries
- Programme governance
- High level system engagement plans
- Change readiness assessment
- Risks identified for change programme

We have identified the key areas to prioritise in Tameside

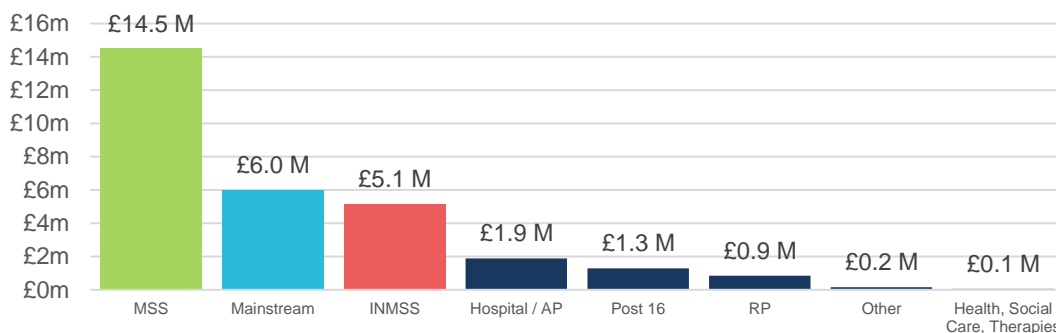


Module 1 Outputs

HNB expenditure has grown 20% in Tameside since FY 19/20 with **MSS, Mainstream and INMSS accounting for 86%** of expenditure.

This growth has been **driven by demand**, with caseload increasing by 16% since FY20/21, while the average cost of supporting each CYP remained relatively steady over the same period.

Expenditure Breakdown by Provision 21/22



Using a linear projection to forecast demand and unit cost, this expenditure is **forecast to grow to £58.2m in 2028**, with INMSS, MSS, mainstream combined accounting for **87% of total expenditure**, and **MSS alone accounting for 47% of total expenditure**

Over 65% of the children being supported in MSS, 50% of children in INMSS, and 30% of children in Mainstream provision start their support at the **transition years** (Ages 4 - 5 primary driver for MSS, with 47% of CYPs starting then)

There are also prevalent primary needs, with **SLCN and SEMH making up 78%** of children being supported in **MSS, 63% in Mainstream** and **73% in INMSS**.

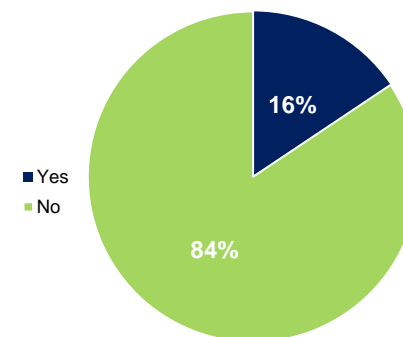
Year	2021	2022	2023	2024	2025	2026	2027	2028
CYPs	1844	2151	2286	2526	2738	2950	3160	3370
Expenditure	£26m	£30m	£34m	£38m	£43m	£48m	£53m	£58m
HNB Deficit	£1.8	£2.8m	£1.4m	£3.5m	£9.1m	£18m	£32m	£49m

Figures in Green at Actual Figures. Figures in Blue are from DBV linear forecasts

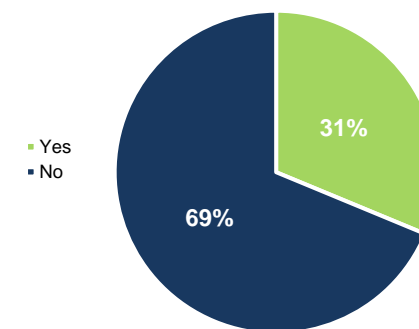
What areas of opportunity have we been exploring in Module 2?

Prioritising the provisions, ages and primary needs from Module 1, **32 cases** were reviewed by a range of professionals across the Tameside SEND system including parents, headteachers, SENCOs and health, to understand if those CYP were **receiving the ideal support** for them to achieve their goals and aspirations.

Could the support required to meet the child's needs be accessed without an EHCP?

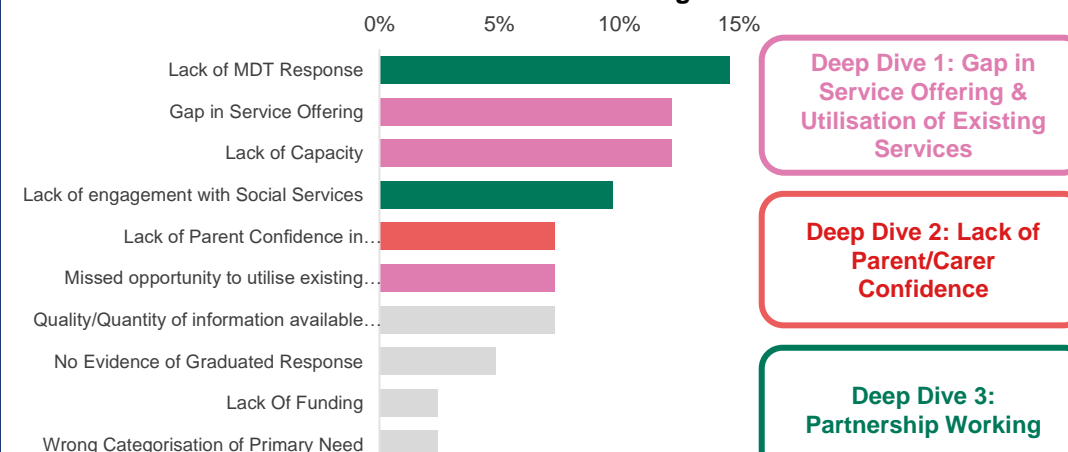


Did we achieve the ideal outcome for the CYP and enable them to achieve their goals and aspirations?



For the 'non-ideal' cases, the **timing of the support** and the **setting** in which the child was being supported were the key factors, being a factor in 78% and 59% of cases respectively.

What themes contributed to achieving a non-ideal outcome?



The use of Tameside's service offering, parental confidence in Mainstream setting and partnership working were the 3 key themes we investigated from case review intelligence



During case reviews, we used the information of each child's current setting to map which themes were most prevalent in each setting, allowing for this to be mapped to opportunities. Using this, we can be confident that addressing these themes will target the right opportunities.

Key Themes from Case Reviews

KEY THEMES TO INVESTIGATE:

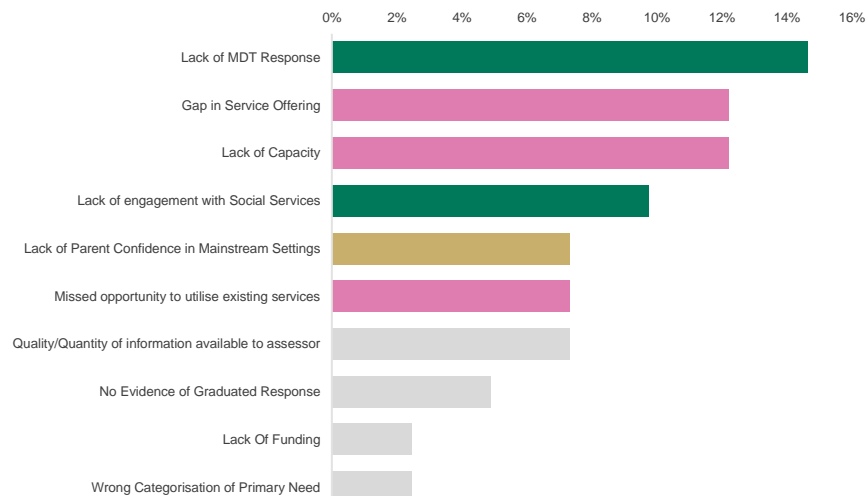
1 **Service Offering, Service Capacity & Utilisation**

2 **Lack of Parental Confidence in Mainstream**

OTHER EVIDENCE AREAS:

Benchmarking Stat Neighbours

Partnership Working



Opportunities	DD1: Gap in Service Offering & Utilisation of Existing Services	DD2: Lack of Parent/Carer Confidence	DD3: Partnership Working	Statistical Neighbors
Supporting the goals and aspirations of the child can be achieved without the need for an EHCP	✓	✓		✓
Supporting the goals and aspirations of the child in a MSS setting rather than INMSS	✓		✓	
Supporting the goals and aspirations of the child in a Mainstream setting rather than MSS	✓	✓	✓	
Supporting the goals and aspirations of the child through Resources/SEN Unit setting rather than MSS	✓	✓	✓	

Current Root Cause Analysis

Service Offering, Service Capacity & Utilisation

1 Which services are underutilised?
How do we improve cross-service collaboration?
Which services are used by which practitioners?

Lack of Parental Confidence in Mainstream

2 How confident are parents in SEN Support
Is this different with an EHCP in Mainstream?
What more do parents want at SEN support?
How does this differ by stage of education?

Caseload Benchmarking

Do we look after CYPs with SEND in a similar way to other LAs like us?
Is the potential to learn from other as to how best distribute cases to support CYPs?

Partnership Working

What are the critical points in the decision to issue an EHCP and the annual review process that follows for intervention?
What are the issues that stop the process delivering the best outcome for a CYP?
What changes could we make to change this?



Education Providers Survey



Parents / Carers Survey



Stat Neighbour analysis



Partnership Working

Module 1 Summary - Tameside

Annual rate 20-22

case review % multiplied by target confidence weighting



HNB Net Position
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Revenue Expenditure

Category	% of Spend	Lever	Historical Growth Rate	Status	If deprioritised or not explored, why?	Target % Reduction
Mainstream School EHCPs	19.3%	Demand (New)	12.9%	Addressed	High proportion of spend and CYP supported with a high historical growth rate	19%
		Demand (Existing)		Deprioritised	Changing decisions that have already been made deemed high risk and therefore prioritising new demand	-
		Unit Cost	-2.2%	Deprioritised	Not contributing to the increase in expenditure	-
RP	3.2%	Demand	19.5%	Deprioritised	Small proportion of HNB expenditure	-
		Unit Cost	-28.5%	Deprioritised	Not contributing to the increase in expenditure	-
MSS	47.1%	Demand	8.0%	Addressed	High proportion of spend and CYP supported with a high historical growth rate	24%
		Unit Cost	5.9%	Deprioritised	Given risk of hitting capacity cap, demand prioritised	-
INMSS	17.8%	Demand	14.8%	Addressed	High proportion of spend and CYP supported with a high historical growth rate	11%
		Unit Cost	2.1%	Deprioritised	Demand prioritised given largest growth in historical trend	-
Post 16	4.3%	Demand	13.6%	Deprioritised	Small proportion of HNB expenditure	-
		Unit Cost	4.3%	Deprioritised		-
Hospital/AP	7.6%	Demand	-	Deprioritised	Small proportion of HNB expenditure	-
		Unit Cost	-	Deprioritised		-
Other	0.7%	Demand	-	Deprioritised	Small proportion of HNB expenditure	-
		Unit Cost	-	Deprioritised		-
Revenue Income		Block Transfer	-	Not explored		-
		Health	-	Not explored		-
		Other Income	-	Not explored		-

2020-2022

To enable the assurance team to understand the discussions and decisions that have resulted in certain scenarios being selected for the DSG management plan, the assurance team would like the Local Authorities to answer the following questions to document the decisions they've been made.

1 Which scenario have you selected for your unmitigated scenario in the DSG management plan:

Lower Bound

Upper Bound

2 Why have you chosen the scenario above for your DSG management plan?

The LA believe the lower bound scenario is both realistic and achievable. The LA has also assumed the increases to specialist place capacity achieved over the last three years will continue into the DBV Plan timeframe and therefore this means the lower bound scenario is the right path.

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What is the confidence weighting you've used for:

	Support without EHCP	MSS > Mainstream	MSS > RP/SEN	INMSS > MSS
Target	47%	35%	47%	50%
Stretch	65%	50%	65%	66%

4 What could be done to increase your confidence weightings (if anything)?

The LA has included a joint workforce development plan in the DBV application and further government training programmes to promote inclusion for schools / governors to access would further strengthen the confidence in mainstream settings.

The LA also believe that DFE / Ofsted can do more to adjust the balance in favour of inclusivity as oppose to attainment and other targets set for schools.

3 Which confidence weighting have you selected for your DSG management plan?

Target Opportunities

Stretch Opportunities

Reviewing the assumptions for the Unmitigated Forecasts

– Upper Bound and Lower Bound Scenarios



	What we assumed in the current forecast	What might we want to adapt for a lower bound forecast?	Tameside comments
EHCP Forecasting	The growth rate in the EHCPs continues and does not slow down over the next 5 years	We may want to consider if there will be a point in time where the proportion of the population with SEN and an EHCP reaches steady state. (5% used as indicative figure)	Tameside instead have fixed EHCP growth against population growth and do not hit a 5% of the population with EHCPs.
	We forecast the growth rate in EHCPs at a provision level	We believe that these assumptions are realistic, and we want to keep in all scenarios of the unmitigated forecast	
	Where the trend at a provision level has been decreasing, we do not forecast this to continue but assume this remains the same as the last financial year and flat going forwards		
	We include known capacity constraints at a provision level	Tameside has historically continued to grow capacity, often without long look ahead on plans to do so	Tameside has forecasted provision capacity constraint growth forward linearly. This was done using historical capacity constraint figures.
When we reach capacity in RP or MSS, we assume that those children's needs cannot be in a mainstream school and so will end starting in the Independent special school sector	Some Local Authorities have taken a different approach when capacity is reached that we want to discuss and explore all options for the lower bound	Given Tameside's capacity constraints in the lower bound scenario, we see no flow into INMSS	
Average cost of an EHCP Forecasting	We forecast the growth rate in the average cost of an EHCP at provision level	We believe that these assumptions are realistic, and we want to keep in all scenarios of the unmitigated forecast	
	Where the average cost has been decreasing, we do not forecast this to continue but assume this remains the same as the last financial year		
	Where the average cost has been increasing, we forecast this to continue	The combination of these assumptions results in 7% increase year on year vs a 1% increase historically across all T2 LAs, for the lower bound forecast we could update the approach to inflation	Tameside challenged unit cost assumptions in their initial upper bound forecasts, so did not feel the need to do this again in the lower bound scenario.
	Known changes to the average cost (inc. framework changes, agreed uplifts etc) are included in the forecast		
Inflation is built on-top of all of the changes above at 4% in FY 22/23 and 3% each year after this			

Effecting the outcomes for 'new starts' in Tameside would result in a cumulative opportunity value of £5.2m – £7.2m by FYE 2028 in the Lower Bound Scenario



The DBV opportunity is built around affecting the number of new starts into SEND provision. This opportunity is calculated from the number of CYPs that would be effected, the difference in unit cost between provisions, and the average duration CYPs spend in each provision.

'New Starts' Opportunity Matrix

Provision (e.g. type of school/setting)	Cases	EHCP Necessary (%)	Ideal Placement (%)	Resourced Provisions or SEN Units	Mainstream schools and academies	LA maintained special schools	Not enough information available
LA maintained special schools	14	86%	43%	29%	29%	0%	0%
Independent or non-maintained special schools	9	100%	44%	0%	0%	22%	33%
Mainstream schools and academies	5	40%	100%	0%	0%	0%	0%
Resourced Provisions or SEN Units	2	100%	50%	0%	0%	0%	50%
Early year settings	2	100%	100%	0%	0%	0%	0%

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Opportunity		Full Sept '24 Year Opportunity ¹		FY 24/25-27/28 Full Opportunity ²	
ID	Summary	Target	Stretch	Target	Stretch
1	Support without EHCP	£838,936	£1,160,231	£2,515,488	£3,478,867
2	MSS > Mainstream	£165,298	£218,194	£1,099,393	£1,451,199
3	MSS > RP/SEN	£715,169	£1,021,671	£781,398	£1,116,282
4	INMSS > MSS	£795,217	£1,099,768	£846,695	£1,170,962
TOTALS		£2,514,621	£3,499,863	£5,242,975	£7,217,310

Calculations Assumptions box

- All recommended movement from case reviews could be applied to predicted new EHCP starts from school year starting 2024 onwards.
- Forecast of new starts per year have been made from High Impact Analysis and CYP data return 20-22.
- Confidence weightings have been reviewed and incorporate all existing deep dive and benchmarking insights
- 2022 new starts have been used as a baseline and predicted caseload growth % has been applied to estimated future new starts rate.
- No overlap between LA Mitigations and DBV opportunities occurs in analysis
- Linear capacity constraint growth modelled into opportunities
- EHCP growth is fixed against population growth
- 1 – Full Sept '24 Opportunity calculated from total number of new starts affected for that academic year (including ongoing from savings from following years of expected education)
- 2 – FY 24/25 to FY 27/28 Opportunity: Calculated off expected monthly benefit being April '24 to April '28. No benefit expected April '24-Aug '24 due to first impact occurring at the start of academic year Sept '24.

Effecting the outcomes for 'new starts' in Tameside would result in a Annualised opportunity value of £5.2m - £7.2m by 2028.



The DBV opportunity is built around affecting the number of new starts into SEND provision. This opportunity is calculated from the number of CYPs that would be effected, the difference in unit cost between provisions, and the average duration CYPs spend in each provision.

'New Starts' Opportunity Matrix

Supporting children's goals and aspirations through the right provision type



Opportunity	Annualised Benefit		5 year cumulative benefit 22/23 – 27/28	
	LB Confidence Weight	UB Confidence weight	LB Confidence Weight	UB Confidence weight
Supporting the goals and aspirations of the child can be achieved without the need for an EHCP	£0.8 M	£1.2 M	£2.5 M	£3.5 M
Supporting the goals and aspirations of the child in a MSS setting rather than INMSS	£0.2 M	£0.2 M	£1.1 M	£1.5 M
Supporting the goals and aspirations of the child in a Mainstream setting rather than MSS	£0.7 M	£1.0 M	£0.8 M	£1.1 M
Supporting the goals and aspirations of the child through Resources/SEN Unit setting rather than MSS	£0.8 M	£1.1 M	£0.8 M	£1.2 M
Total	£2.5 M	£3.5 M	£5.2 M	£7.2 M

Calculations Assumptions box

- All recommended movement from case reviews could be applied to predicted new EHCP starts from school year starting 2024 onwards.
- Forecast of new starts per year have been made from High Impact Analysis and CYP data return 20-22.
- Confidence weightings do not currently incorporate Module 2 Deep Dive outputs
- 2022 new starts have been used as a baseline and predicted caseload growth % has been applied to estimated future new starts rate.
- Linear capacity constraint growth modelled into opportunities

Opportunity	Annualised Benefit		5 year cumulative benefit 22/23 – 27/28	
	LB	UB	LB	UB

The total value of cumulative benefit will be £7.8m - £9.8m in Lower Bound Scenario

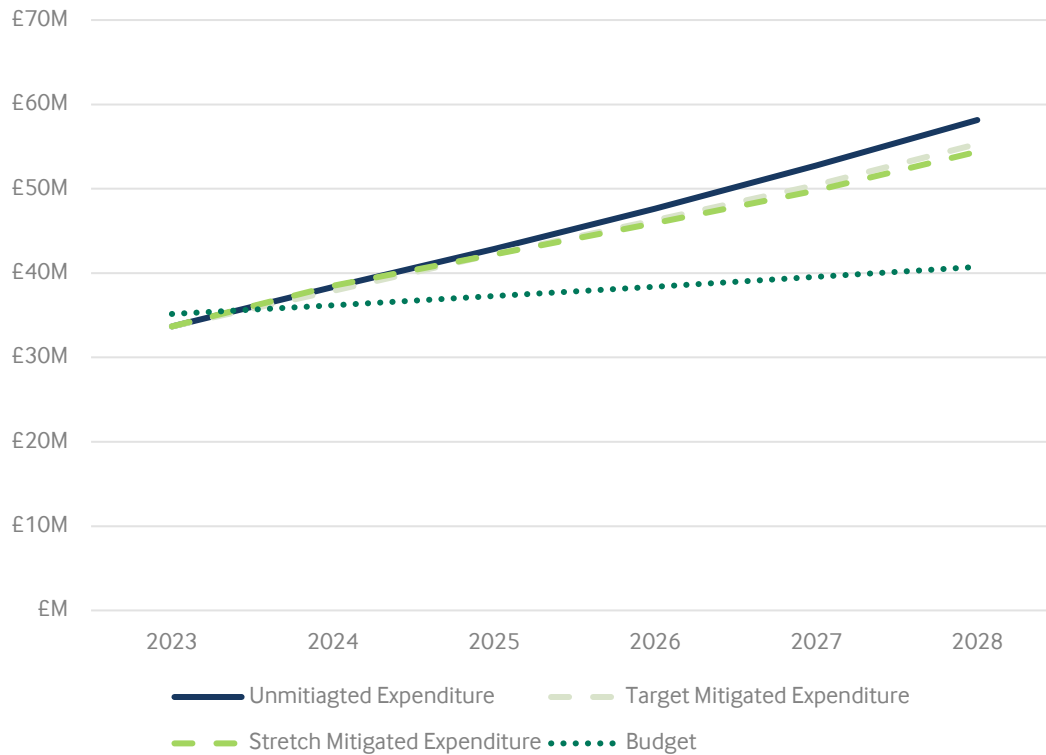


Method and assumptions

- The benefits profile is built with an increasing baseline of forecasted starts and costs year on year using the agreed module 1 output
- Any deficit calculations for future scenarios were built off 3% budget increases year-on-year
- Opportunity modelled on projected number of new pupils and projected unit cost

- Unmitigated INMSS flow goes back into MSS in LA mitigations to add to RP capacity opportunity*
- We have assumed that benefit will only be coming in from Sep 2024 as that is when all opportunities begin to take effect
- Trends built from row level data from 2021-2023 calendar years
- Aggregated view of individual provision projections

Comparison of Stretch and Target Expenditure



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Opportunity		Cumulative Benefit	
		LB Confidence Weight	UB Confidence weight
1	Support without EHCP	£2.5 M	£3.5 M
2	MSS > Mainstream	£0.8M	£1.1 M
3	MSS > RP/SEN	£0.8 M	£1.0 M
4	INMSS > MSS	£1.1 M	£1.5M
Existing mitigations	Increased RP provision	£2.6m	
Total		£7.8 M	£9.6M

DBV Opportunities will affect Mainstream, RP, MSS and INMSS caseload



HN Pupil Unmitigated Projections per provision								
Provision	2021	2022	2023	2024	2025	2026	2027	2028
Mainstream	674	820	859	966	1055	1144	1232	1320
RP	70	97	100	119	133	148	162	177
MSS	768	855	896	964	1025	1085	1145	1205
INMSS	85	92	112	123	136	149	162	175
Post 16	247	287	319	355	390	424	459	493
Total EHCPs	1844	2151	2286	2526	2738	2950	3160	3370

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Table shows the unmitigated EHCP projections in each provision

Our main savings will be through reduction in CYPs in the INMSS, which has been facilitated by LA mitigations

Opportunity Area	Target Mitigated Number of EHCPs							
	2021	2022	2023	2024	2025	2026	2027	2028
Target Mainstream	674	820	859	966	1030	1071	1106	1134
Target RP	70	97	100	168	189	215	240	266
Target MSS	768	855	896	915	966	1010	1054	1099
Target INMSS	85	92	112	123	134	144	153	162
TOTAL EHCPs	1844	2151	2286	2526	2709	2864	3012	3154

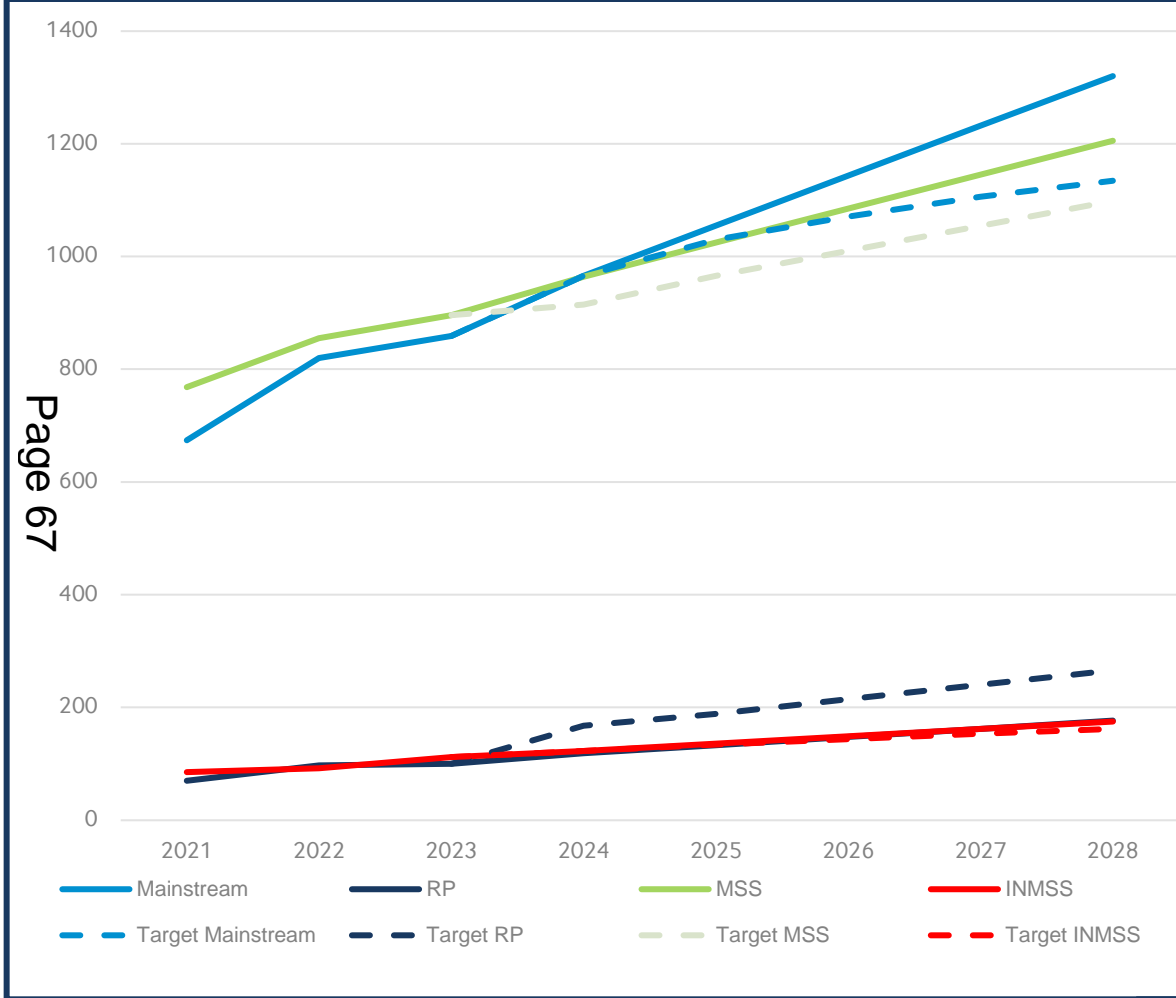
Opportunity Area	Stretch Mitigated Number of EHCPs							
	2021	2022	2023	2024	2025	2026	2027	2028
Stretch Mainstream	674	820	859	966	1021	1044	1058	1065
Stretch RP	70	97	100	168	191	221	251	281
Stretch MSS	768	855	896	915	962	999	1037	1074
Stretch INMSS	85	92	112	123	134	142	150	158
TOTAL EHCPs	1844	2151	2286	2526	2698	2831	2956	3072

Above tables show the target and stretch mitigated projections for number of EHCPs in provisions affected by the opportunities

DBV Opportunities will affect Mainstream, RP, MSS and INMSS caseload



HN Pupil Unmitigated Projections per provision



Graph shows the unmitigated EHCP projections in each provision

Opportunity Area	Target Mitigated Number of EHCPs							
	2021	2022	2023	2024	2025	2026	2027	2028
Target Mainstream	674	820	859	966	1030	1071	1106	1134
Target RP	70	97	100	168	189	215	240	266
Target MSS	768	855	896	915	966	1010	1054	1099
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TOTAL EHCPs	1844	2151	2286	2526	2709	2864	3012	3154

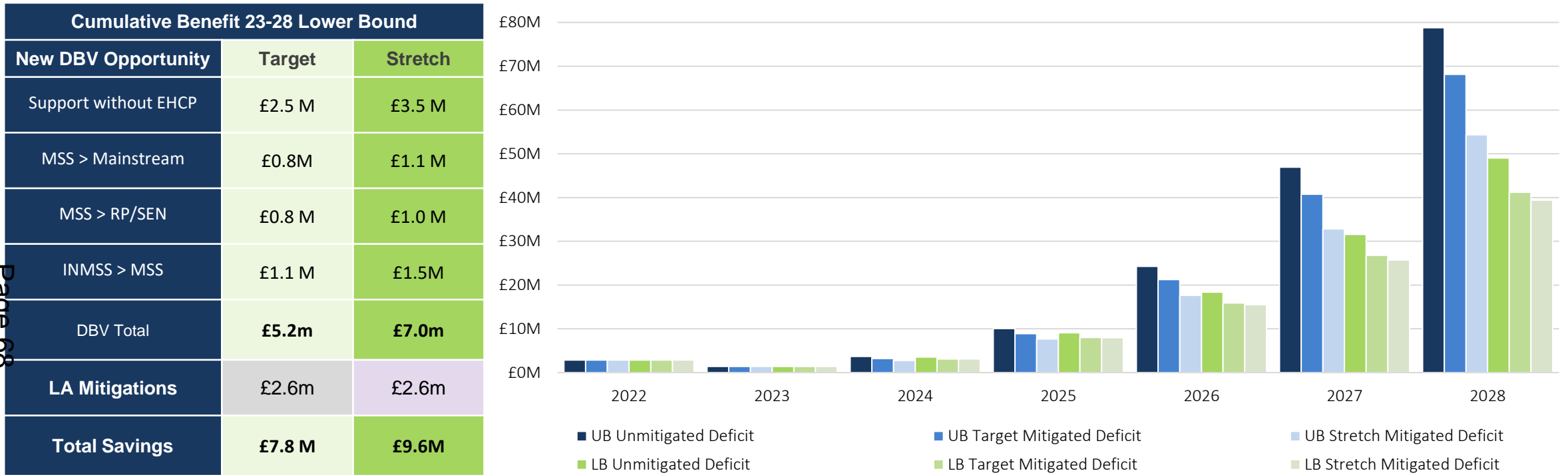
Opportunity Area	Stretch Mitigated Number of EHCPs							
	2021	2022	2023	2024	2025	2026	2027	2028
Stretch Mainstream	674	820	859	966	1021	1044	1058	1065
Stretch RP	70	97	100	168	191	221	251	281
Stretch MSS	768	855	896	915	962	999	1037	1074
Stretch INMSS	85	92	112	123	134	142	150	158
TOTAL EHCPs	1844	2151	2286	2526	2698	2831	2956	3072

Above tables show the target and stretch mitigated projections for number of EHCPs in provisions affected by the opportunities

Final Mitigated Deficit (including DBV and Existing Mitigations)



Tameside Cumulative Deficit Comparison



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Year	2021	2022	2023	2024	2025	2026	2027	2028
Fixed Constraint Unmitigated Cumulative Deficit	£1.8m	£2.9m	£1.4m	£3.7m	£10.1m	£24.3m	£47.0m	£78.8m
Fixed Constraint Target Deficit	£1.8m	£2.9m	£1.4m	£3.2m	£8.9m	£21.3m	£40.7m	£68.1m
Fixed Constraint Stretch Deficit	£1.8m	£2.9m	£1.4m	£2.8m	£7.7m	£17.6m	£32.9m	£54.3m
Linear Constraint Unmitigated Cumulative Deficit	£1.8m	£2.9m	£1.4m	£3.5m	£9.1m	£18.4m	£31.6m	£49.0m
Linear Constraint Target Deficit	£1.8m	£2.9m	£1.4m	£3.1m	£8.1m	£15.9m	£26.8m	£41.2m
Linear Constraint Stretch Deficit	£1.8m	£2.9m	£1.4m	£3.1m	£8.0m	£15.5m	£25.7m	£39.4m

Grant Application Summary: Tameside MBC



DSG ALLOCATION
22/23
£242.059m

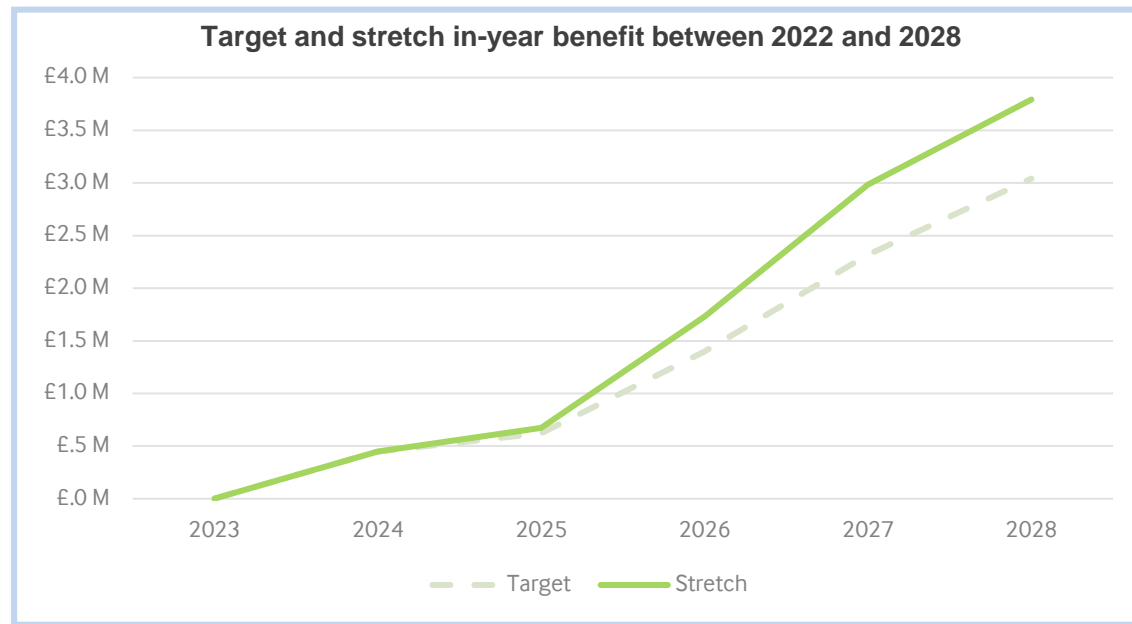
UNMITIGATED CUMULATIVE DSG DEFICIT END OF FY 22/23
£3.306m

% DSG DEFICIT TO DSG ALLOCATION (22/23)
1.37%

LBTARGET CUMULATIVE OPPORTUNITY 22/23-27/28
£7.8m

STRETCH CUMULATIVE OPPORTUNITY 22-23-27/28
£9.6m

RANGE OF ANNUALISED BENEFIT (TARGET TO STRETCH)
£2.5m - £3.5m



TARGET COHORTS BASED ON DIAGNOSTIC EVIDENCE:

There has been a rapid increase in EHCP plans over the last three years and in particular those with a in SLCN. The starts in maintained special schools at the key transition points have put pressure on the capacity and spend through maintained special schools. However the evidence suggests needs could have been met differently or within a time-limited programme of specialist support.

- Rapid escalation in referrals for EHCPs pre 2023 particularly for age 4 and 5 year olds with SCLN
- An EHCP being seen, by parents and some schools, as a requirement to trigger the right provision and support.
- Fragile parental confidence and nervousness of some schools for SEN Support and EHCP pupils as they reach key transition points.

WORKSTREAM PLAN & USE OF GRANT MONEY (£1m APPLICATION)

- 1. Inclusion Quality and Outreach Team:** recruitment of new roles, linked to Special Schools and Resource Provisions, that will ensure SEN funding allocated to schools is spent effectively, establishing new approaches to working with schools to robustly challenge the impact of their spending on outcomes and to assess if a child still requires the support they are receiving. Also ensuring good practice is shared, graduated response tools / strategies are applied effectively and escalation of needs / placement stability in mainstream settings is supported.
- 2. Effective transitions –** Establish a new Early Years Assessment Centre, with good quality wrap around services that provide a targeted support to the assessment centre and cluster schools to ensure effectiveness of transition from **Nursery to Reception**. Improving the identification and support to children that are likely to struggle at **transition from primary to secondary** to ensure we provide right support at right time without needing a formal EHCP and / or escalation to a maintained special school.

Summary of DBV opportunities and workstreams (excluding LA mitigations)



Opportunity / Findings:

Supporting the goals and aspirations of the child can be achieved without the need for an EHCP

Supporting the goals and aspirations of the child through Resources/SEN Unit setting rather than MSS

Supporting the goals and aspirations of the child in a Mainstream setting rather than MSS

Supporting the goals and aspirations of the child in MSS setting rather than INMSS

Page 7
How will the workstreams target this opportunity:

Effective Inclusion:

- Creation of an Inclusion and Outreach Team linked to / managed by existing Special Schools and Resource Provisions
- Identification of best practices and communication across the system

The grant will support the creation of the Inclusion and Outreach Team which aims to stabilise mainstream placements and ease the pressure on maintained special schools hence reduce the need for INMSS

Effective Inclusion:

- Training of SEND teams and partners as appropriate and developing workforce development opportunities (including parents and carers) to enhance parental confidence across the SEND system and therefore trust the right support is being provided in the right provision at the right time.

The grant will support the delivery of new training programmes and the creation of joint workforce development opportunities

Effective transition at early years and Primary to Secondary:

- Improve the assessment at early years ages to ensure the best chance of transition to a mainstream setting rather than maintained special and other transition activities / funding to improve the effectiveness of transition and parental / school confidence in transition to mainstream settings, therefore reducing demand on maintained special schools and use of INMSS.

The grant will support the creation of an Early Years assessment centre and 6 into 7 transition activities and funding.

Benefits:

5-year opportunity:
 £2.5m - £3.5m
Delivery start-date: Sept 2022
Benefits start-date: Sept 2024

5-year opportunity:
 £0.85m – £1.12m
Delivery start-date: Sept 2023
Benefits start-date: Sept 2024

5-year opportunity:
 £0.78m – £1.12m
Delivery start-date: Sept 2023
Benefits start-date: Sept 2024

5-year opportunity:
 £1.10m - £1.45m
Delivery start-date: Sept 2023
Benefits start-date: Sept 2024

Objective and Approach

The objective of the work is to increase inclusion in mainstream schools, which has been identified as the biggest driver of non ideal outcomes across the LA, where 57% of cases reviewed during case reviews were found to have non ideal outcomes as a result. In order to address the perception that mainstream schools cannot meet the child's needs, we are establishing an Inclusion Quality and Outreach Team, linked to Special Schools and Resource Provisions, and a joint workforce development programme, which will include parents and carers. This will take pressure off maintained special schools places and in turn minimise the flow of pupils out of borough to independent non-maintained special schools. It is our aspiration for the Inclusion Quality and Outreach team to work with all Tameside mainstream schools and for 80% of the identified workforce to access the joint workforce development offer. This will improve the proportion of CYP who could be effectively supported to achieve their ideal outcome in a mainstream school.

Programme Team

Senior Accountable Officer
Head of SEND

Key System Partners
Headteachers from each sector
Education Psychologists
Specialist Outreach Support team
Workforce Development team

Project Lead
SEND Project Manager (in post)

Delivery Team
PCF Rep, Headteachers / SENCOs,
SEND service Leads

Stakeholders

To support design:	Impacted by change:
<ul style="list-style-type: none"> Parent Carer Forum SEND Inclusion and Partnership Board Headteacher / SENCo reps – all sectors LA SEND team 	<ul style="list-style-type: none"> Early years service Mainstream Schools Parents and carers CYP SENCOs

Milestone Events

See slide 21

Interdependencies

This requires alignment with the broader SEND Inclusion and Partnership Board strategy (see also slide 18 and 19).

Review of SEND Teams and Specialist Outreach Support Service (RING – Relational Inclusion Needs Group – providing a hotline for schools to receive an immediate response to concerns etc)

Enablers

Governance	G
Digital Capability	D
Leadership	L
Capacity	Cc
Capability	Cb

Likely Measures

Top-level
EHCP starts in Maintained Special Schools
Number of escalations / requests for change of placements

Leading
Numbers of workforce / parents trained
Workforce / parents confidence post training

Risks

The recruitment of the right people with the right skill set to form the Inclusion Quality and Outreach Team and who manages the team to ensure consistent and high impact.

The number of other teams and initiatives that potentially confuse schools and detract from clarity of responsibility.

Parents and carers do not engage with joint workforce development opportunities.

Inclusion: Improving inclusive practice will support more children and young people to achieve high quality outcomes in Mainstream Settings, having a cascade effect on placements within our MSS & INMSS settings



Activity	Description	Impact
Inclusion Service	<p>A team of specialist practitioners, linked to / managed by existing Special Schools and Resource Provisions, who will offer expertise and support to early years providers, schools (primary & secondary mainstream) and other professionals to promote inclusion, raise aspirations and improve outcomes for children. Focussing on early identification and intervention, they will have a key role in determining the appropriate level of provision and support including monitoring the use of top up funding. The Inclusion Service will focus on ASD & SEMH support in the primary/secondary settings, alongside an Early Years specialist.</p>	<p>The introduction of an Inclusion Service will reduce pressures on existing teams, cascade good practice, support and challenge the use of a graduated response and provide capacity to implement the Workforce Training Programme. This team will provide support and challenge to settings where inclusive practice can be improved. This dedicated team will provide oversight and accountability of use Top Up Funding to deliver better outcomes for children, therefore decreasing the number of EHCP's and specialist placements needed.</p>
Joint Workforce Training Programme	<p>Purchasing of license agreements and train the trainer costs to create a robust training programme to upskill practitioners across the Borough to increase and widen their knowledge and confidence in meeting the needs of children and young people within their setting. The programme will develop over time, but initial focus will be on ASD and SEMH. Opportunities will be taken to include parents and carers in elements of the workforce development programme. A common framework and language will be defined tied to the THRIVE MPTN approach to ensure consistent application of graduated response.</p>	<p>Settings told us that they have difficulties with recruiting specialist staff, this programme will enable staff already within the organisation to become specialists. Settings will be better equipped to meet the needs of more complex children and young people in their setting. Reducing escalation to MSS/INMSS. Relationships across SEND professionals and parents and carers will grow as they develop together, hearing the same messages will also improve parental confidence. Everyone uses a common language, based on THRIVE, to ensure a true graduated response and to minimise dis and mis information.</p>
THRIVE resource development	<p>Tameside and Salford have developed their THRIVE Matching provision to need toolkit. However feedback from SENCO's and other professionals varies substantially in terms of awareness and confidence to use. We will develop a suite of training materials and resources that break it down into bite size chunks and utilize the Inclusion team practitioners to signpost and train SENCO's School staff and TA's to improve adoption and use as part of a graduated response.</p>	<p>Settings will be able to access support for their children and Young People via a hot line to the Inclusion service who will act as Broker to match make them to the right resources, and expertise within our MSS and the inclusion team. Everyone including parents will use a common language, based on THRIVE, to ensure a true graduated response to minimise dis and misinformation .</p>
Inclusion Quality Partnership Mark	<p>Schools engaged in the Inclusion service and WFD will benefit from rapid access to inclusion support and cultural development training to help embed inclusive practice in schools. Linking expertise from our Inclusion teams, with the formation of working clusters between MSS and MS schools with Resource Provisions, we can create a long term inclusion training programme for schools along side support that enables them to qualify for the IQP Mark</p>	<p>Inclusive practice will lead to better outcomes for CYP. Reduced exclusions and placement break down. Improved relational inclusive practice and support for CYP and staff lead by Inclusion service. MSS expertise will be available to MS schools through cluster networks and annual programme of training and workshops to share best practice, interventions and approaches to improve inclusive practice.</p>

Inclusion Milestone Events

Inclusion Service

Milestone	When
Service announcement	Sept 2023
Engagement Sessions	Oct 2023
Recruitment and Induction	Jan 2024
Termly assessment of inclusive practice and setting stabilisation	Spring term 2024 onwards
Annual Impact Assessment to SEND Inclusion and Partnership Board	September 2024

THRIVE resource development

Milestone	When
Align THRIVE and urgent needs assessment from Inclusion partner support review and SENCO network feedback	Sept 2023
Develop/Procure/commission Materials & Resources	January 2024
Hotline launched for schools	February 2024
Training launched / materials available /Annual Survey baseline	May 2024
Rolling annual Inclusion CPD programme for HT, SENCO's Teachers and TA's	May 2025

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Workforce Training Programme

Milestone	When
Programme offer design/development	September 2023
Programme communication and launch	January 2024
Increase in skills and confidence (Annual Survey)	September 2024
Parents and carers report improved communication and support	September 2024

Inclusion Quality Partnership Mark

Milestone	When
Align MSS with MS school to formalise Partnership cluster network	Sept 2023
Develop IPQ Framework with Inclusion team MSS and MS schools	July 2024
Launch IQP framework to all schools	Sept 2024
IPQ mark award and sharing of best practice	July 2025

Transitions

Objective and Approach

The objective of the work is to improve the effectiveness and confidence in key transitions. Age 4,5,11,12,13 have been identified as the most significant ages when new EHCP starts in Maintained Special Schools that accounts for half of the current total spend within the High Needs Block and increased strain on Maintained Special School places can lead to high cost out of borough independent non-maintained special schools places. In order to address the planning, confidence and support that surrounds transition, we are establishing a new Early Years Assessment Centre and providing a range of support initiatives and planning improvements well in advance of key transition points. It is our aspiration to support 60 children with two terms of additional funding into Year 7, for all secondary school to host an Inclusion Summer Camp and one new Early Years Assessment Centre to be opened. This will improve the number of CYP who could be effectively supported to achieve their ideal outcome in a mainstream school. Tameside's case management system (CAPITA One) is stable, updated when appropriate and is subject to continuous cleansing to ensure the system is fit for purpose. The inclusion of financial information within CAPITA One has improved management information and the current implementation of a SEN Portal / Yr6 to Yr7 function will further support our approach to improve transitions.

Programme Team

Senior Accountable Officer
Head of SEND

Key System Partners
Headteachers / SENCOs from each sector
Specialist Outreach Support Service

Project Lead
SEND Project Manager (in post)

Delivery Team
PCF Rep, Headteachers / SENCOs, SEND service Leads

Stakeholders

To support design:

- Parent Carer Forum
- Partnership and Inclusion board
- Headteacher / SENCO reps from each sector
- LA SEND team

Impacted by change:

Early years service
Mainstream Primary schools
Parents
CYP
SENCOs

Interdependencies

This requires alignment with the broader SEND Inclusion and Partnership Board strategy.

Link with local ICB initiatives re Autism in Schools, Neurodiversity Profiling Tool and My Happy Mind as the intention is to start at 0 – 5 in Tameside.

Enablers

Governance	G
Digital Capability	D
Leadership	L
Capacity	Cc
Capability	Cb

Likely Measures

Top-level
EHCP starts in Maintained Special Schools
Stability of Reception and Yr 7 mainstream school placements

Leading
School and parents confidence in transition rating

Milestone Events

See slide 24

Risks

The formal processes for the school establishing an Early Years Assessment Centre delay the opening date.

All secondary schools do not agree the establishment of Inclusion Summer Camps and this dilutes the drive for a consistent inclusive culture and effectiveness of transitions.

The ability to identify the right target cohort for additional transition funding support.

Activity	Description	Impact
Early Years Transition assessment centre	<p>Analysis identifies a significant number of new EHCP starts in MSS at ages 4 and 5 which puts pressure on MSS capacity and ultimately a potential flow to INMSS. The results from the impact of SENIF funding indicate that children are able to access MS after short intensive work and without the need for an EHCP but a good SEN Support Plan. The assessment center pilot in one locality will test the assessment center pathway with a view that assessment centers will be set up for each locality. The Early Years Assessment Centre will benefit from the wrap around of health services / EP support co-located at the Assessment Centre and will outreach to mainstream schools and PVI settings in the locality. The Assessment Centre will improve the effectiveness and confidence of schools and parents surrounding transition from Nursery to Reception.</p>	<p>Children will benefit from intensive support whilst retaining the opportunity to move back into mainstream schools once the intervention at the assessment center is complete. Thereby ensuring our youngest children receive the best start and most ideal outcome in terms of setting</p>
Clearing back-log of Annual Reviews	<p>Commission additional capacity to clear the back log of annual reviews in order that a focus on a multi-disciplinary team approach to annual reviews at Yr5 to Yr6 and Yr6 to Year 7. This will ensure clarity of any additional support required to maintain a mainstream setting and a one page plan that is signed off by MDT / Parents and carers to provide confidence in transition.</p>	<p>Greater parental and mainstream confidence in transitions. Improved multi-agency working to improve the support and confidence at key transition points</p>
6 into 7 transition support (a)	<p>Building on the 6into7 tool and timely Annual reviews, we will look to provide a proactive temporary bespoke transition funding offer in the first two terms of Yr7 for children most in need of additional support in their move to mainstream secondary school.</p>	<p>Greater parental and mainstream confidence in transitions. Mainstreams benefit from support funding to ensure positive and inclusive transitions. On hand support from Inclusion team to facilitate training of staff and support CYP 6 into 7 transition cohort. Better utilization of MSS and development of expertise in RP's to support transition.</p>
6 into 7 transition support (b)	<p>Building on the 6into7 tool and timely Annual reviews, we will enhance the information sharing between SENCOs of our Yr5 and Yr6 SEN Support cohort through 6into7 and "speed dating" in the Spring term of each academic year. Finally the consistent offer of an Inclusion Summer School Camp based at each secondary schools will be supported which will improve confidence of pupils, parents and schools of transition to mainstream and establish / transfer best practice across our Secondary schools.</p>	<p>Primary and Secondary Schools will be better informed / equipped to support an effective transition to mainstream and the content of a child's one page plan will be improved and agreed ahead of transition. Inclusion Summer schools will smooth transition pathways for children and young people through experiencing the secondary school environment.</p>
Parental confidence in transitions	<p>Linked to the workforce development programme and 6 into 7 transition support, there will be a Programme aligned to the relational Inclusion Programme over 3 terms that helps parents help children prepare for their transition from year 6 to year 7.</p>	<p>Parents have more confidence on the overall pathways of support that are available to ensure positive transition to secondary school.</p>

Transitions Milestone Events

Early Years Assessment Centre

Milestone	When
Engage with cluster schools	October 2023
Communication and launch	Nov / Dec 2023
Establish a new Early Years Assessment Centre	Sept - January 2024
Commission and co-locate wrap around services	January 2024
Termly Impact Assessment	Spring 2024

Annual Review Backlog

Milestone	When
Targeted caseload identified	Sept / Oct 2023
Commission / Recruitment	October 2023
Support to clear annual review backlog starts	November 2023
Reduction in Requests at Panel & Tribunal	Spring 2024
Enables start to 6 into 7 workstreams	Spring 2024

6 into 7 Transition Support (a)

Milestone	When
Identification of pupils requiring additional support	Jan / Feb 2024
Agreed planned use of funding via one page profile	March / April 2024
Delivery of additional support in secondary setting	Sept 24 – March 25
Impact report from each school	April 25
Impact report on stability of placement	April 25

Impact Milestone

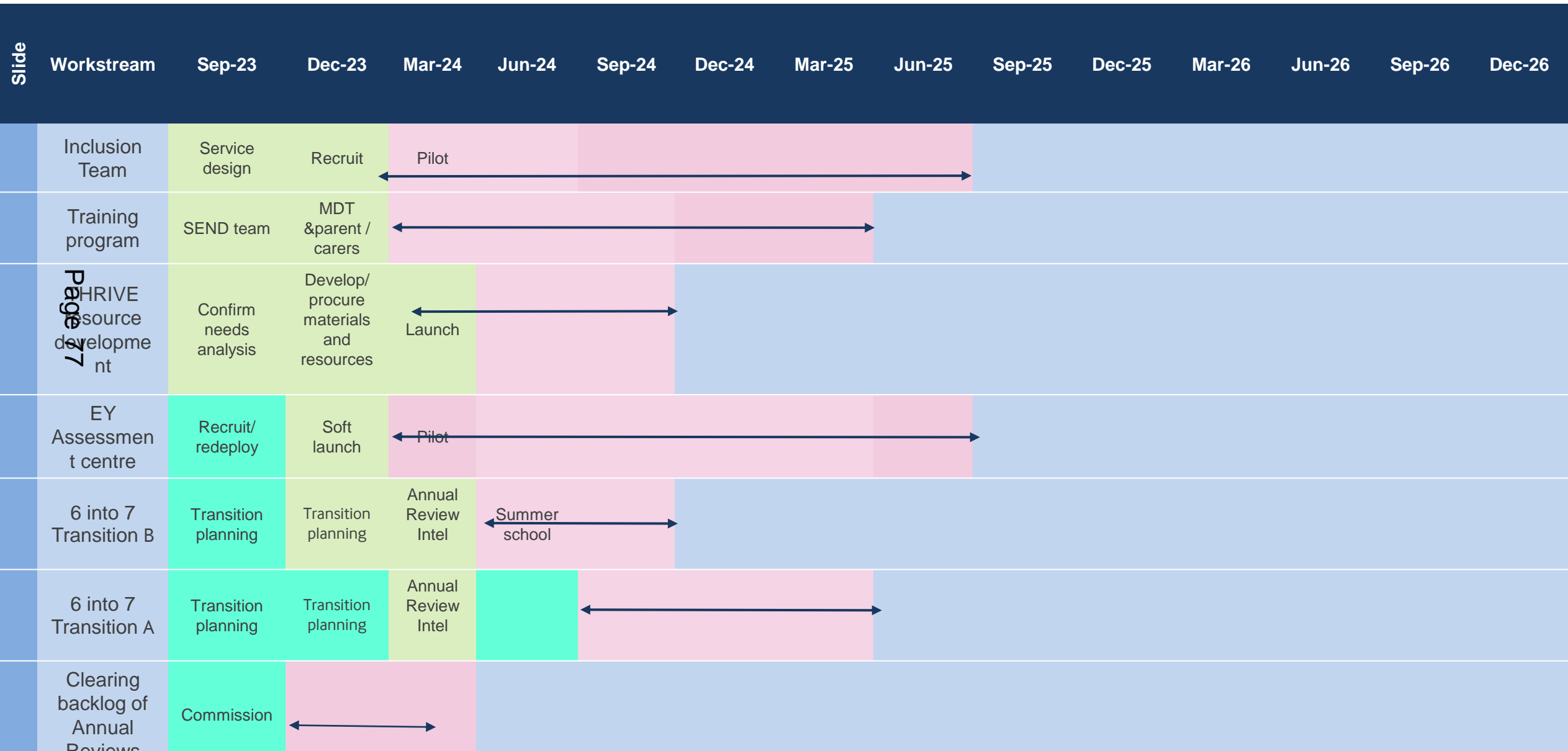
6 into 7 Transition Support (b)

Milestone	When
Consultation with Secondary Schools	Oct / Nov 2023
Planning for Inclusion Summer Camps	Jan – May 2024
Delivery of Inclusion Summer Camps	July – Sept 2024
Parents and carers and schools report improved confidence in transition	May - Sept 2024
Impact report on stability of placement	Oct 2024



What is the programme plan?

Below is an example of what an overall implementation plan may look like



DBV Programme Risks

Risks have been identified and mitigation plans are in place. Risk management will be part of the overall governance and reviewed at the monthly steering group.



No	Type	Workstream	Cause	Effect	Risk Manager	Rating	Control/Mitigation	Review
1	Inclusion	Establishment of Inclusion Quality and Outreach Team	Effectiveness of Recruitment	Standing up the service and linking to existing Special Schools and Resource Provisions could draw from same pool that our schools are also targeting. Potential to delay establishment of teams and approach.	Head of Service		<ul style="list-style-type: none"> Ensuring schools are integral to the design of and implementation of the workstream. Exploring all recruitment avenues Work with leads for existing reviews of team structures that are complimentary to Inclusion workstream 	October 2023
2	Transition	Early Years Assessment Centre	Recruitment of wrap around health services	The new Early Years Assessment Centre and schools within the locality will not benefit from the wraparound support that is required to enhance quality of delivery	Programme Manager		<ul style="list-style-type: none"> Consulted ICB commissioner and Service Manager of Therapies to forward plan for the recruitment of wrap around services through a joint commissioning arrangement. 	October 2023
3	Transition	6to7 (a)	Strength of 1page profile/transition overcoming	Reduces ability to overcome parental confidence / concerns about ineffective transition planning.	Head of Service		<ul style="list-style-type: none"> We will ensure the delivery of the annual review back-log recovery plan Training of staff will be implemented Processes will be tightened to ensure parent and carers sign-off of the one page plan 	January 2024
4	Transition	6to7 (a)	Insufficient time in SENCO timetable to enable appropriate planning and info exchange	The identification of the cohort of children to receive temporary additional support is not effective.	Head of Service		<ul style="list-style-type: none"> Ensuring schools are integral to the design of and implementation of the workstream. 	February 2024
5	Transition	6to7 (b)	All secondary schools do not agree the establishment of Inclusion Summer Camps	Dilutes the drive for a consistent inclusive culture and effectiveness of transitions	Asst Director Education		<ul style="list-style-type: none"> Ensuring schools are integral to the design of and implementation of the workstream. 	December 2023

SEND Inclusion and Partnership Board

The SEND Inclusion and Partnership Board was established in June 2023 and will meet half termly. The Practice workstream below includes the implementation, assurance and monitoring of our DBV Plan. Board will receive an exception report and deep dive into elements of the DBV delivery at each meeting.

Work Streams

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Communication and co-production

- Themes/Actions from WSOA
- Timeliness & Annual Reviews
- QAF
- Learning from complaints

Assessment, Monitoring & Quality

- Preparing for Adulthood
- Develop a learning culture
- Joint workforce development
- Inclusion Quality Partnership
- Social Care and early help approaches
- Graduated approach across settings
- Add Consistency and quality of

Practice

- SEND places
- SEND Provision – Peer Review; Inclusion Quality Partnership
- Health Provision eg SALT, OT, CAMHS
- Joint Commissioning
- Health diagnosis wait times
- Stability of right school placement
- Delivering Better Value in SEND

Access to Provision and Support

- Parent & CYP engagement
- Partner engagement; Newsletter; surveys
- Local Offer
- Designated caseworkers
- Digital solutions
- Application of co-production charter/principles

Reference Groups

TCP Inclusion Committee SENDCo Networks Schools Forum
 Headteacher Fora Health [TBC] EY Working Group Parent/Carer Forum – OKE CYP [TBC]

SEND Inclusion and Partnership Board
Chair: Asst Director of Education and SEND
Termly

Steering Group
Chair: DBV Project Manager

- | | | |
|---|---|--|
| Head of SEND | SEND Services Team Manager | Inclusion and Engagement Committee rep |
| Head of Tameside Pupil Referral Service and Relational Inclusion Programme Lead | SENCO reps | Education Psychologist |
| Strategic Finance Manager | Head of Specialist Outreach Support | Designated Medical Officer |
| Head of Communications | Head of Education and Partnerships | Participation & Engagement Officer |
| Performance & Data Officer | Head of Cared for Children and Care Leavers | Parent Carer Forum Representative |

Inclusion

Transitions

Task Groups

Task Groups

What did young people with SEND and parents and carers say?

Parents & Carers & Young People



Young Person: I need support with setting goals/targets to work towards.

Young Person: I need encouragement to socialise.

Parents and carers: Lack of Trust in the SEND system and the way it is applied in Tameside..... SEND team need training

Parents and carers: Transition at Yr6 / Yr7....schools / parents panic re SEND pupils coping in secondary setting

Young Person: I need to be encouraged to be independent

Parents and carers: communication is poor

Parents and carers: Lack of consistency of inclusion culture across mainstream schools.....parents then fight for an EHCP

Young Person: I need a place to find support that is available.

Young Person: I need bigger spaces/less crowded

Parents and carers: Current secondary school model doesn't work for neuro-divergent children

Parents and carers: Schools not held to account for use of SEND resources and lack of inclusion culture (no teeth or inclusion challenge from LA)

What will the grant money be used for?



Tameside are applying for **£1,000,000**. The funding will be used to realise the identified opportunities and as per the description in section 3 and 4. The funding will be required at the following points and is based on the proposed programme delivery plan. It is assumed that, if successful a Grant Offer Letter will be signed off by early October 2023 and then a period of effective workstream planning and recruitment, as appropriate, will take place. Spending in earnest will start January 2024, however two elements of the plan (£400k) are linked to certain school terms and will not start until summer term 2024.

A breakdown of the drawdown and use of funding is listed below:

Workstream & Area	Impact (Opportunities Supported)	Total Financial Cost	Spend 2023/24 (Financial Year)	Spend 2024/25 (Financial Year)
Inclusion				
Inclusion Quality and Outreach Team	xxx	£ 285,000.00	£59,000	£226,000
External training and workforce development	xxxx	£ 60,000.00	£20,000	£40,000
Transition				
Establish new Early Years Assessment Centre	xxx	£ 201,000.00	£40,000	£161,000
Commission capacity to clear back-log of annual reviews	xxx	£ 54,000.00	£54,000	0
Two terms of transition support to targeted pupils	xxx	£ 240,000.00	£0	£240,000
Consistent approach to Inclusion Summer Schools		£ 160,000.00	£0	£160,000
		£1.00 M	£173,000	£827,000

Grant Application: Tameside MBC

1 How much of the grant are you applying for?

Tameside MBC are applying for **£1,000,000**. The funding will be used to realise the identified opportunities as per this grant application.

2 Who from the LA will be responsible for ensuring that the grant money is effectively used to realise the expected return on investment?

The following people within the LA will be responsible for the effective use of the funding to deliver the stated opportunity areas:

[List officers/positions responsible for the delivery and financial monitoring of the programme]:

- Position 1: Jane Sowerby - Overall accountable person for the delivery of the programme and the effective use of the funding
- Position 2: Dave Leadbetter - Overall responsible person for the day to day delivery of the programme/opportunity areas

3 Who from the authority is signing off this grant application?

Finance: Ashley Hughes
SEND Service Delivery: Ali Stathers-Tracey

4 Digital infrastructure

The digital infrastructure has been mapped out.

If digital resource or input is needed, either as part of the deliverables of the workstream, or as part of tracking the impact of the work, how this will be done/resourced is detailed here

Digital resources or input is not needed as the current CAPITA One case management system is fit for purpose and current plans to update with a SEN Portal and Yr6 to Yr7 function will support delivery of workstreams and tracking of impact. The Council will continue to resource and plan the digital infrastructure required to delivery our DBV Plan.

Existing System Engagement

Schools & Settings



How have we engaged with Schools and Settings so far?

- Surveys
- Case Reviews and Deep Dive Workshops
- Head Teacher Associations
- Inclusion Committee
- SEND Sufficiency Group
- Schools Forum
- SENCO Network

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How are they feeling now?

We have been able to get feedback from schools and settings, share valuable insight that we have gained through the programme and explore ideas for how we can work together to improve SEND for children and young people in the borough.

Schools and settings are excited to continue our SEND improvement journey and value this added opportunity through the DBV programme, which they see aligns to Written Statement of Action priorities.

Parents & Carers & Young people



How have we engaged with Parents and Carers so far?

- Surveys
- Case Reviews
- Parent Carer Listening Events
- Young People Participation Events

How are they feeling now?

Parent Carer Forum are positive about the changes that are being implemented to improve inclusive practice and transition in the local area. They recognise that for children/young people to achieve the best outcomes that provision should be within their communities with the right support at the right time.

There are some concerns that the programme is focussed on saving money, and there are some concerns that CYP will not get the support that they need.

Multi-disciplinary Partners



How have we engaged with multi-disciplinary partners (e.g. Health, Social Care) so far?

- SEND Improvement Group
- Tameside Provider Partnership
- Case Reviews
- Listening Events
- Deep Dive workshops

How are they feeling now?

Multi-disciplinary partners are aware of the work that is ongoing and are eager to be involved in the improvement of outcomes for children and young people.

They are keen to work in partnership and we are currently exploring how other programmes and projects overlap to maximise resource.

Existing System Engagement

Legend

Done

Not done

Tameside	Engagement Activities		Status	Notes/ Explanation
Parent and carers	Heads up <i>(Set Up/ Module 1)</i>	Sharing communication materials	Done	Email with intro video shared
		Briefings/Q&A	Done	Stand at local offer day 20/04
	Contribution to Problem Definition <i>(Module 2)</i>	Surveys	Done	
		Listening Forums	Done	10/05 & 11/05 discussion groups for parents.
	Contribution to Shaping the Implementation Plan <i>(Module 3)</i>	Participation in Case Reviews	Done	Parent/carers present at case reviews.
		Working session	Done	10/05 & 11/05 discussion groups for parents.
		Sharing draft plans	Done	6 th June
PCF forum	Attend at least 1 PCF	Not done	There are a number of parent forums so utilising the routes above	
CYP Voice	Contribution to Problem Definition	Listening Forums	Done	SEND passport currently being used via participation workers
Healthcare	Heads up <i>(Set Up/ Module 1)</i>	Sharing communication materials	Done	Clinical and Care Professional Advisory Group – 19th April and DBV update at next SEND Partnership meeting
		Briefings/Q&A	Done	As above
	Contribution to Problem Definition <i>(Module 2)</i>	Surveys	Not done	Engaging via other routes
		Listening Forums	Done	
		Participation in Case Reviews	Done	
	Contribution to Shaping the Implementation Plan <i>(Module 3)</i>	Working session	Done	23 rd May
		Sharing draft plans	Done	5 th June
Education Providers	Heads up <i>(Set Up/ Module 1)</i>	Sharing communication materials	Done	
		Briefings/Q&A	Done	
	Contribution to Problem Definition <i>(Module 2)</i>	Surveys	Done	
		Listening Forums	Done	
		Participation in Case Reviews	Done	
	Contribution to Shaping the Implementation Plan <i>(Module 3)</i>	Working session	Done	23 rd May
		Sharing draft plans	Done	5 th June

DBV and fit with SEND System Improvements



The DBV Programme and engagement that been undertaken throughout underpins, connects and accelerates the SEND system improvement. Joining up and common language.....

One example being considered **RING** (Relational and Inclusion Needs Group) brings together multiple workstreams and provides coherence for schools and parents and carers:

RING – a one stop shop for SEND support and advice....provided instantly rather than waiting for panels or constant signposting. RING will bring together:

SENDIASS

Legal Offer

Health Navigator (current OKE (Parent and carers Forum) offer recently developed)

Relational Inclusion offer – attachment / trauma informed inclusion practice (current LA offer relatively new following pilots)

Review of Specialist Outreach Support team (current LA review)

Inclusion Quality and Outreach Team (**DBV**)

The work and intelligence from RING will inform Joint workforce Development programme (**DBV**)

Other connections include: SEND Team review, SEND Sufficiency developments (including Early Years Assessment Centre (**DBV**)), Health initiatives to be linked to establishment of Early Years Assessment Centre.....Autism in Schools, My Happy Mind, Neurodiversity Profiling Tool (identify Early Help and support), improved communication with parents and carers through dedicated resource identified by LA.

The following slide also provides a high-level link between DBV and Tameside's Written statement of Action (WSOA).....

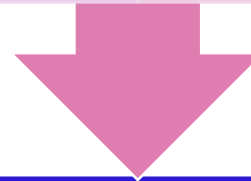
DBV "Inclusion" – How does it link to WSOA?

Priority 2 Parental confidence and satisfaction with provision

Priority 4 – Sufficiency and Inclusive practice

Priority 7 - Oversight of SEND provision

Priority 8 – Consistent application of THRIVE and Graduated approach



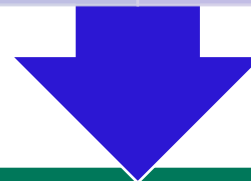
DBV "Transitions" – How does it link to WSOA?

Priority 2- Parental Confidence and satisfaction with Provision

Priority 9 – Poor transition arrangements across all stages of Education

Priority 7 – Oversight of SEND Provision

Priority 8 - Consistent application of THRIVE and Graduated approach



DBV- underpins and accelerates system change needed across critical areas (Secondary SENCo – “DBV process really interesting and was honoured to be part of it....powerful for SENCos to say they have been involved in this kind of work and we will be using to champion our own inclusive practices”)

Health partners to jointly commission and join up initiatives linked to Early Years Assessment Centre

Social Care partners engagement with annual reviews and SEND system improvement generally

Mainstream school peer with Mainstream Specialist Schools for Inclusion Quality Partnership

Wraparound support for Schools through RING – Relational Inclusion Needs Group.

Making Change Happen: Parents & Carers



Making the change

What is my Pot of Gold?

What is the pot of gold that will motivate me to change?

Children and young people are in schools/settings in their communities, enabling them to develop and share experiences with their peers.

Trust and transparency across the SEND System is embedded and I don't feel I have to battle daily



Doing Nothing

What do I love about the status quo – and how can I hold onto it?

What are the benefits of not changing? Why do I want things to stay as they are?

There are no benefits to the current system, parents/carers feel they have to fight to get the support that their child/young person needs. Parents of children and young people at SEN Support often do not feel confident that the right support at the right time will be available, leading to an EHCP application.



How will you make it easy for me?

What can my LA do to remove barriers to the change and help me to reach my pot of gold?

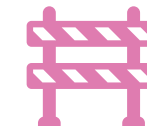
Improve communication and visibility and training of SEND services to alleviate frustrations and mistrust.

One place and / or person to contact to navigate the SEND system

More SENCo time and consistent quality

Improved inclusion culture across mainstream schools

Reduced waiting times for diagnosis



What bites me if we stay the same?

Children and young people will continue to not have their needs met, and they will not reach their potential. Impacting their later life opportunities.

Burnout for parents and stress and delays of complaints and tribunals

Children and young people become more and more isolated as they have to travel further to access provision and this causes a strain on the family dynamic as well.



Future System Engagement

Schools & Settings



How do we plan to we engage with schools and settings during design and implementation?

- Schools/Settings will be part of the reference group, and will take an active roll in task and finish groups
 - The recruitment and development of the SEND Inclusion Quality and Outreach Service
 - Joint Workforce Development Plan
 - Transition 6 to 7
 - Early Years Assessment Centre
- Obtain feedback from schools/settings at every stage so that change can be implemented quickly
- Communicating success through
 - SEND Inclusion and Partnership Board
 - Inclusion Committee
 - SENCO Network
 - Schools Forum
 - Primary Heads Meetings
 - Secondary Heads Meetings
 - Special School Heads Meetings

Parents & Carers & Young People



How do we plan to engage with parents and carers during design and implementation?

- *Parent Carer Forum will be members of the programme steering group and take an active role in specific task and finish groups for example:*
 - *The recruitment and development of the SEND Inclusion Quality and Outreach Service*
 - *Joint workforce Development Plan*
 - *Transition 6 to 7*
 - *Inclusion Summer Camps*
- *We want the gathering of feedback from parents/carers and CYP to be the norm and our communication to be clear what we have / are doing in response.*
- *We will also collect feedback on specific topics through:*
 - *Listening & Engagement events*
 - *Surveys*
 - *Schools/Settings*
- *Communicating success through:*
 - *SENDing the News, our termly newsletter*
 - *SEND Local Offer website and social media channels.*

Multi-disciplinary Partners



How do we plan to engage with multi-disciplinary partners (e.g. Health, Social Care) during design and implementation?

- Multi-disciplinary partners will be part of the steering group and reference group, and will take an active roll in task and finish groups
 - Joint workforce Development Plan
 - Early Years Assessment Centre
- Obtain feedback from multi-disciplinary partners at every stage so that change can be implemented quickly
- Communicating Success through
 - SEND Inclusion and Partnership Board
 - Joint Sending the News
 - System Partner meetings
 - Joint Commissioning meetings

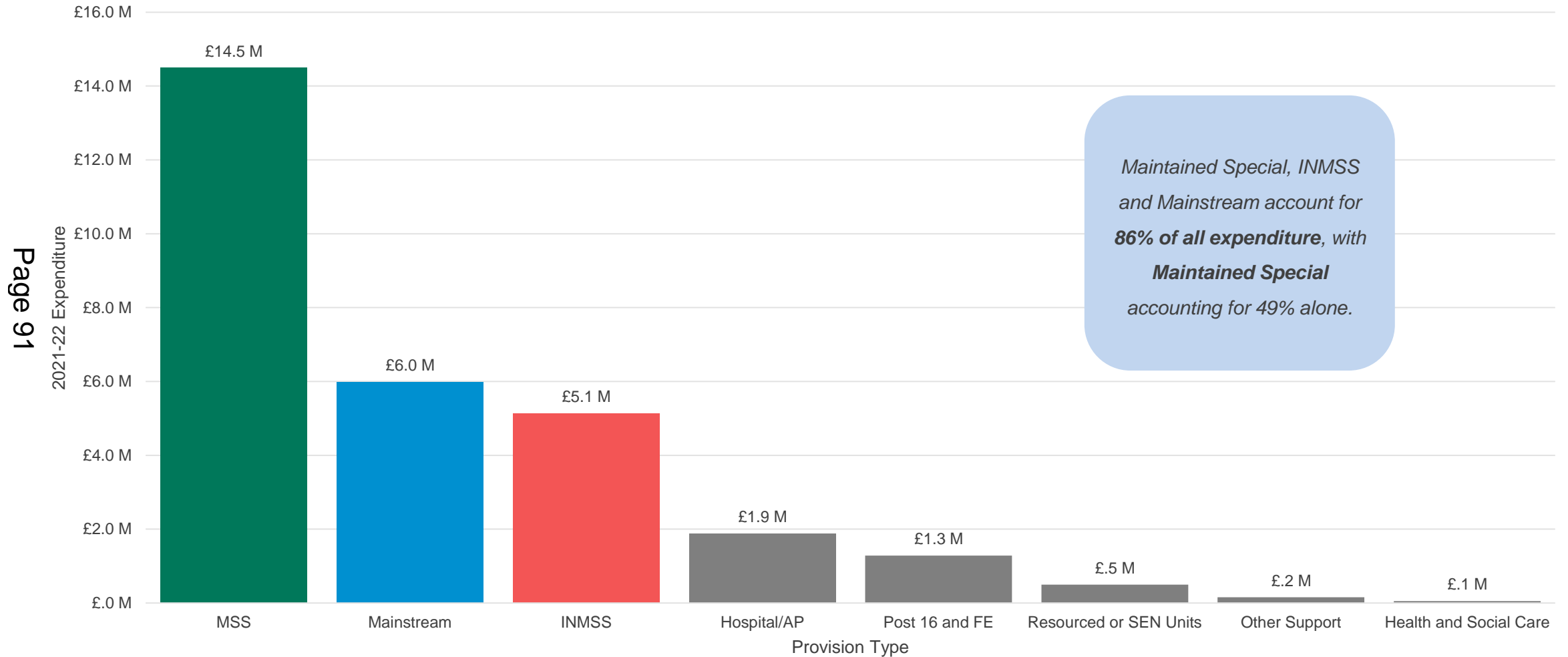
High Impact Analysis



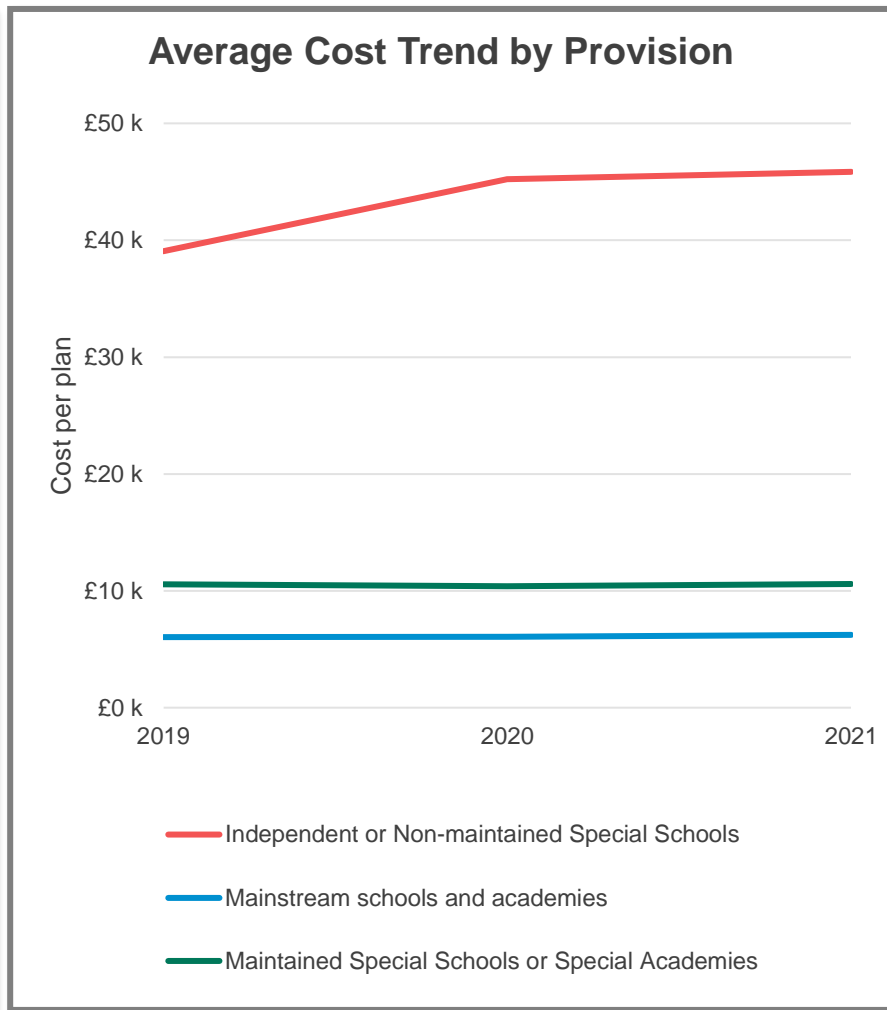
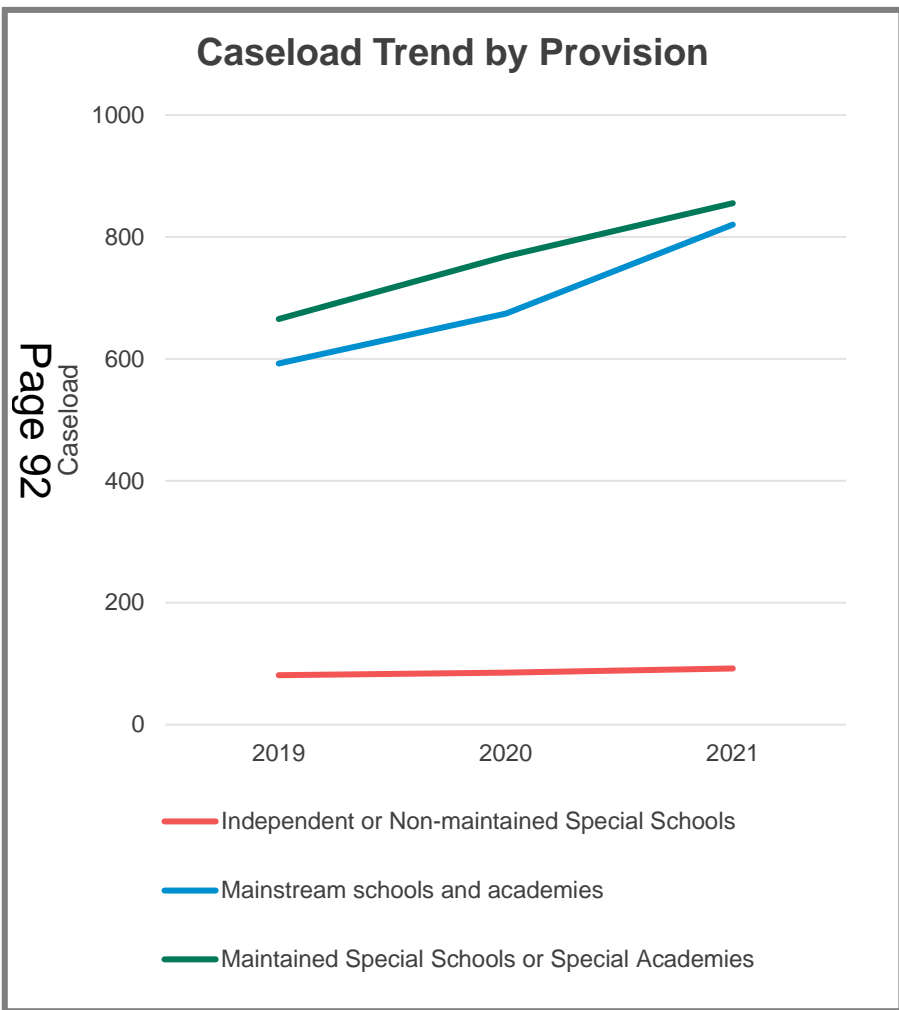
The three biggest areas of spend have been in Maintained Special (MSS), Mainstream and INMSS settings.



High Needs Block Expenditure Breakdown, 2021-22



The same provisions experienced considerable expenditure growth and make up the largest proportion of total spend.



Average annual caseload and unit cost changes, 2019-2021

Mainstream

- 19% growth in caseload
- 2% growth in unit cost

MSS

- 14% increase in caseload
- Unchanged unit cost

INMSS

- 7% increase in caseload
- 9% growth in unit cost

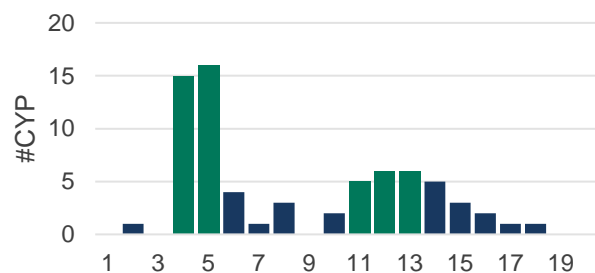
Across our three focus areas, we see significant CYP starts around primary and secondary transition ages (4-5, 11-13), and prominently in SLCN and SEMH need types.



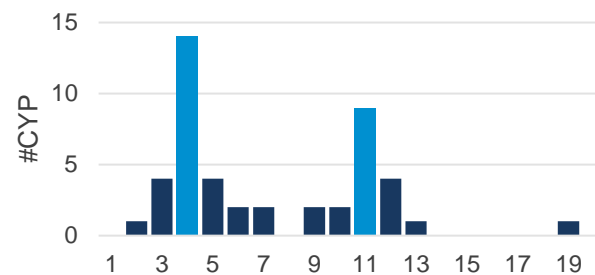
We used CYP level data to assess our current caseload in Tameside and this has provided clarity on when plans are starting and which primary needs are most prominent in the LA.

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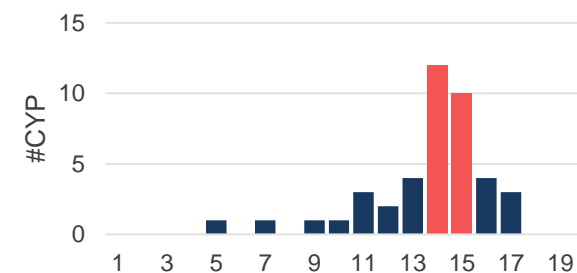
2021 #EHCP Starts by Age at EHCP Start in MSS



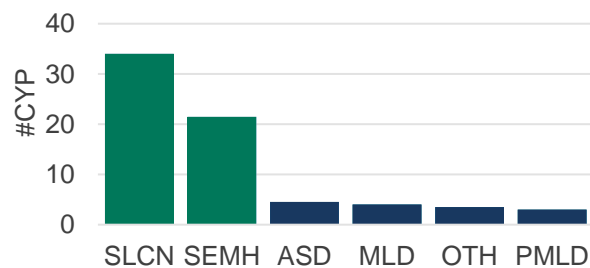
2021 #EHCP by Age at EHCP Start in Mainstream



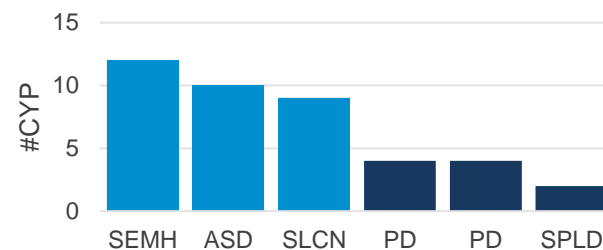
2020-21 #EHCP Starts by Age at EHCP Start in INMSS



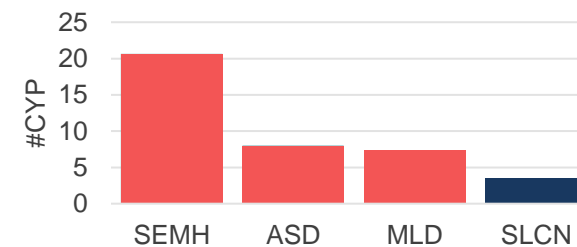
2021 #EHCP Starts by Primary Need in MSS



2021 #EHCP Starts by Primary Need in Mainstream



2020-21 #EHCPs Starts by Primary Need in INMSS



SEMH and ASD need types and transition-age CYP were taken forward as priority cohorts for Module 2 deep dives.



- Based on the analysis of trends in expenditure and caseload, the following cohorts were targeted as part of the case review selection for Module 2:



Speech, Language and Communication Needs (SLCN) and Social Emotional and Mental Health (SEMH)

Why?

Analysis shows that these are the most common primary need cohort in EHCP across all provisions in Tameside, and therefore identifying how we can improve outcomes for this cohort would affect a significant proportion of the overall population.



Transition Years

Why?

Analysis shows that this is the time where we see a significant number of starts across the priority settings of focus. We tend to see a heavier trend towards primary transition.



INMSS near graduation years

Why?

Unlike other provisions, the INMSS provision sees a trend of starts when CYPs are post-Year 9 and about to take major exams like GCSE and A Levels.

The key question in case reviews will be to understand whether we achieved an **ideal outcome** for each child and young person (i.e. did we provide the most ideal package of support, at the ideal time, in the ideal area), and if not, the reasons preventing this.

Case Reviews



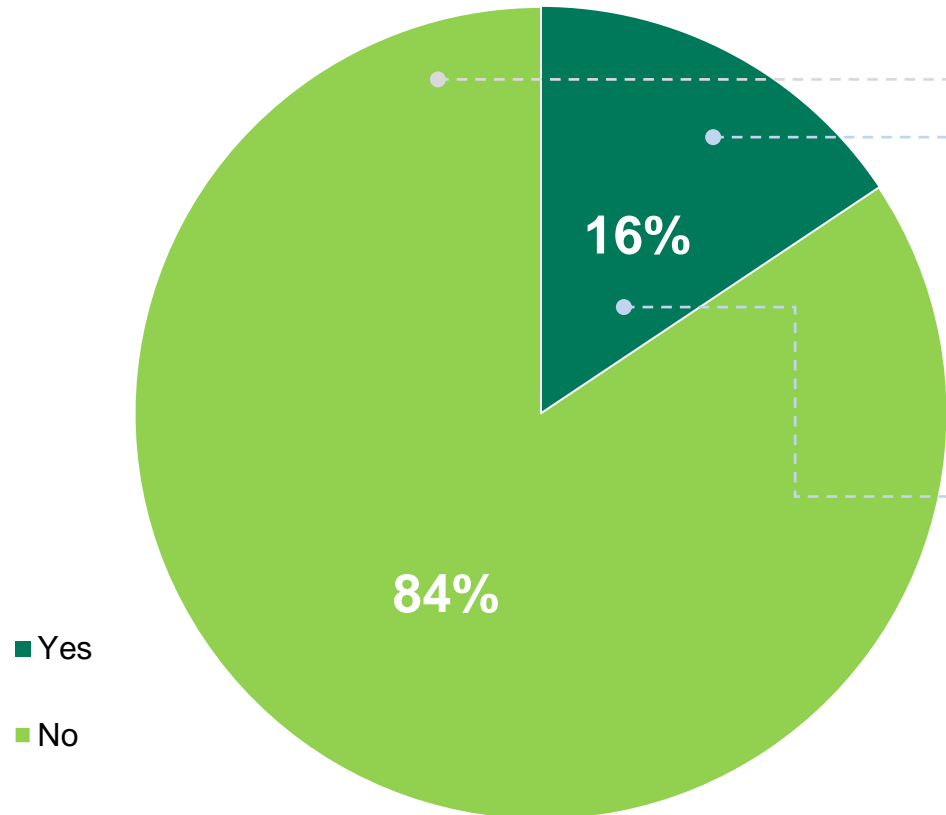
Across our three largest cost centers, 16% of CYP could have received an ideal outcome without needing an EHCP.



We completed 6 case review workshops in April 2023 with **participants from across a range of disciplines**, reviewing **32 unique cases** to understand whether we delivered an **ideal outcome** to a CYP with SEND. We reviewed cases of CYP with a range of primary support needs at **mainstream, maintained special schools and INMSS**.

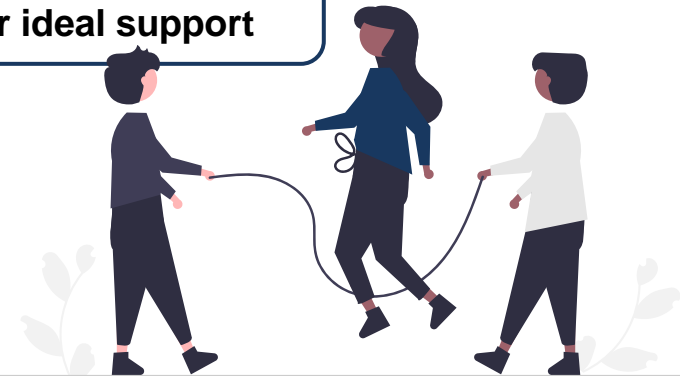
Could the support required to meet the child's needs be accessed without an EHCP?

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In 84% of cases, the group felt an EHCP was required to access the support to meet the CYP's needs

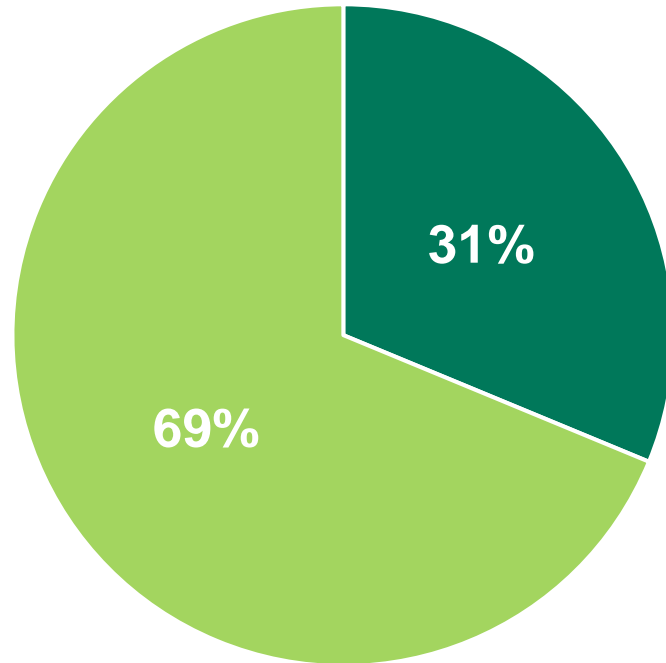
In Mainstream, the group felt that 60% (3 of 5 reviewed) of EHCPs were not needed to deliver ideal support



It was found that issues around timing and provision frequently contributed to non-ideal outcomes.



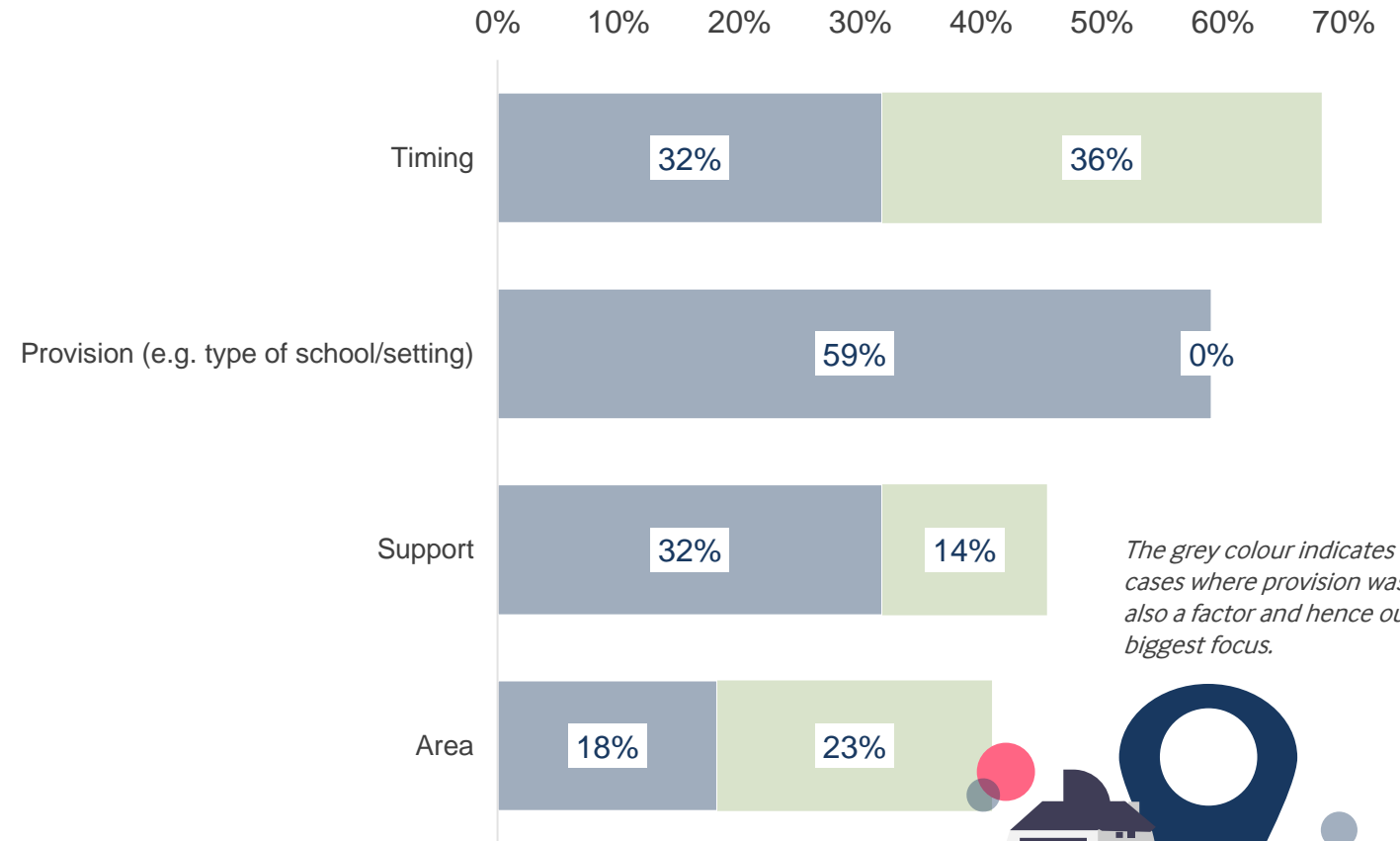
Did we achieve the ideal outcome for the CYP and enable them to achieve their goals and aspirations?



■ Yes
■ No

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Where we did not achieve an ideal outcome, what were the areas that were non-ideal?



The grey colour indicates the cases where provision was also a factor and hence our biggest focus.

In cases of non-ideal provision, outcomes for CYP are non-ideal at a large financial impact to the LA.



Among the cases surveyed, 57% of Maintained Special School placements and 56% of INMSS placements were non-ideal.



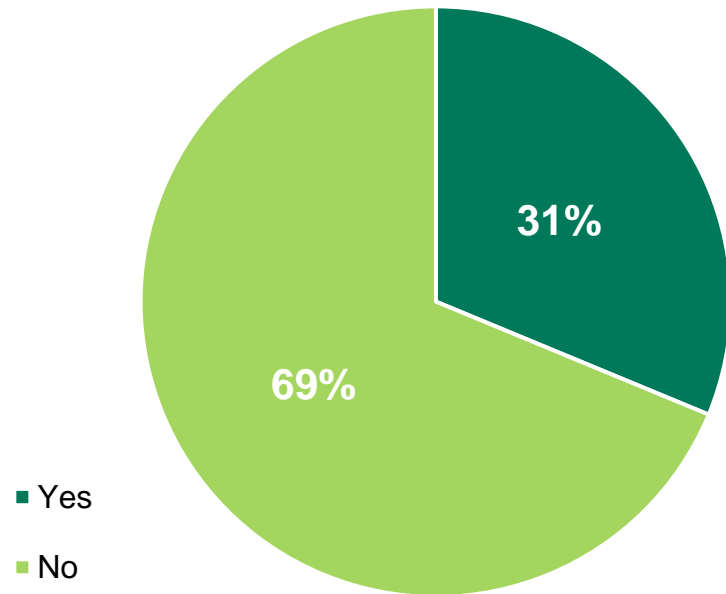
Department of Education



Which provisions would be better suited to deliver ideal outcomes?

Did we achieve the ideal outcome for the CYP and enable them to achieve their goals and aspirations?

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Provision (e.g. type of school/setting)	Cases	EHCP Necessary (%)	Ideal Placement (%)	Resourced Provisions or SEN Units	Mainstream schools and academies	LA maintained special schools	Not enough information available
LA maintained special schools	14	86%	43%	29%	29%	0%	0%
Independent or non-maintained special schools	9	100%	44%	0%	0%	22%	33%
Mainstream schools and academies	5	40%	100%	0%	0%	0%	0%
Resourced Provisions or SEN Units	2	100%	50%	0%	0%	0%	50%
Early year settings	2	100%	100%	0%	0%	0%	0%

Our largest opportunities are around the cohorts of CYP starting in INMSS and MSS placements.

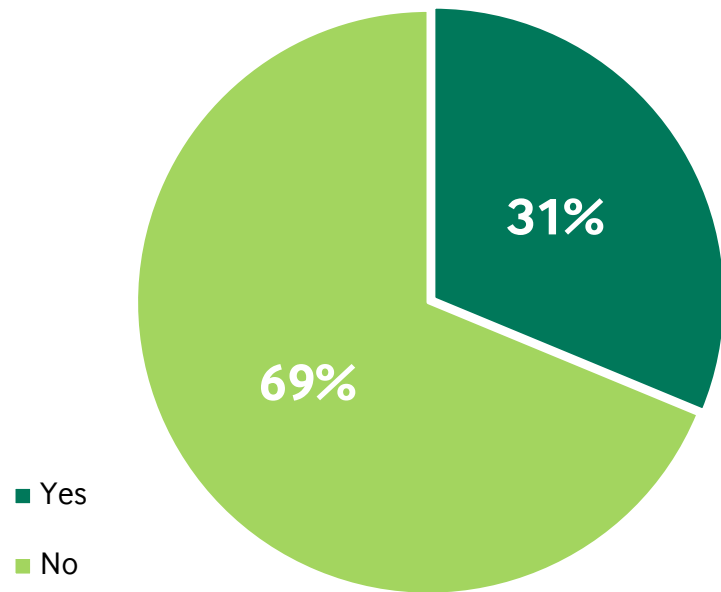
Lack of MDT response and gap in service offering were the biggest barriers to achieving ideal outcomes



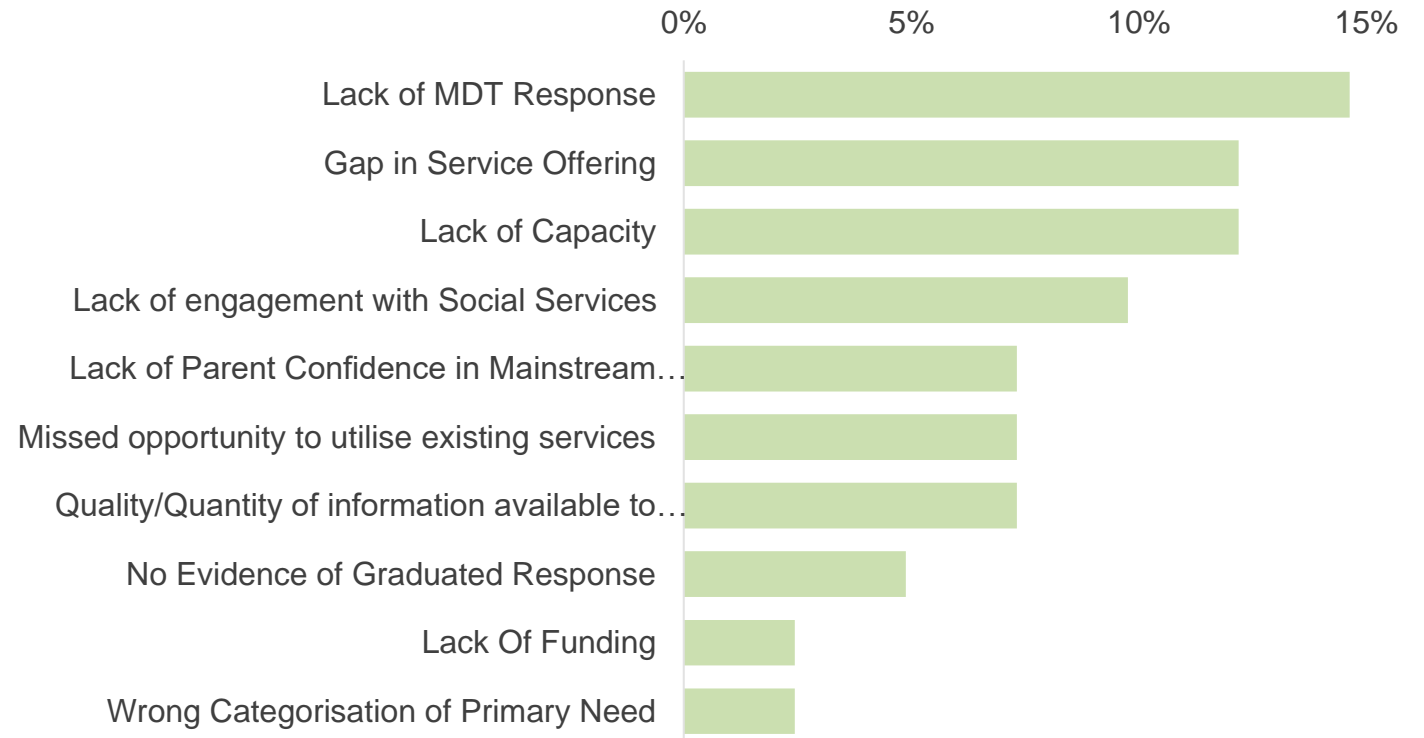
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Did we achieve the ideal outcome for the CYP and enable them to achieve their goals and aspirations?

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What themes contributed to achieving a non-ideal outcome?



Our largest opportunities are around the cohorts of CYP starting in INMSS and MSS placements.

In Module 2's deep dive activities, we want to go further to understand what we can change to improve outcomes for our CYP



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?



Deep Dive 2: Lack of Parent/Carer Confidence

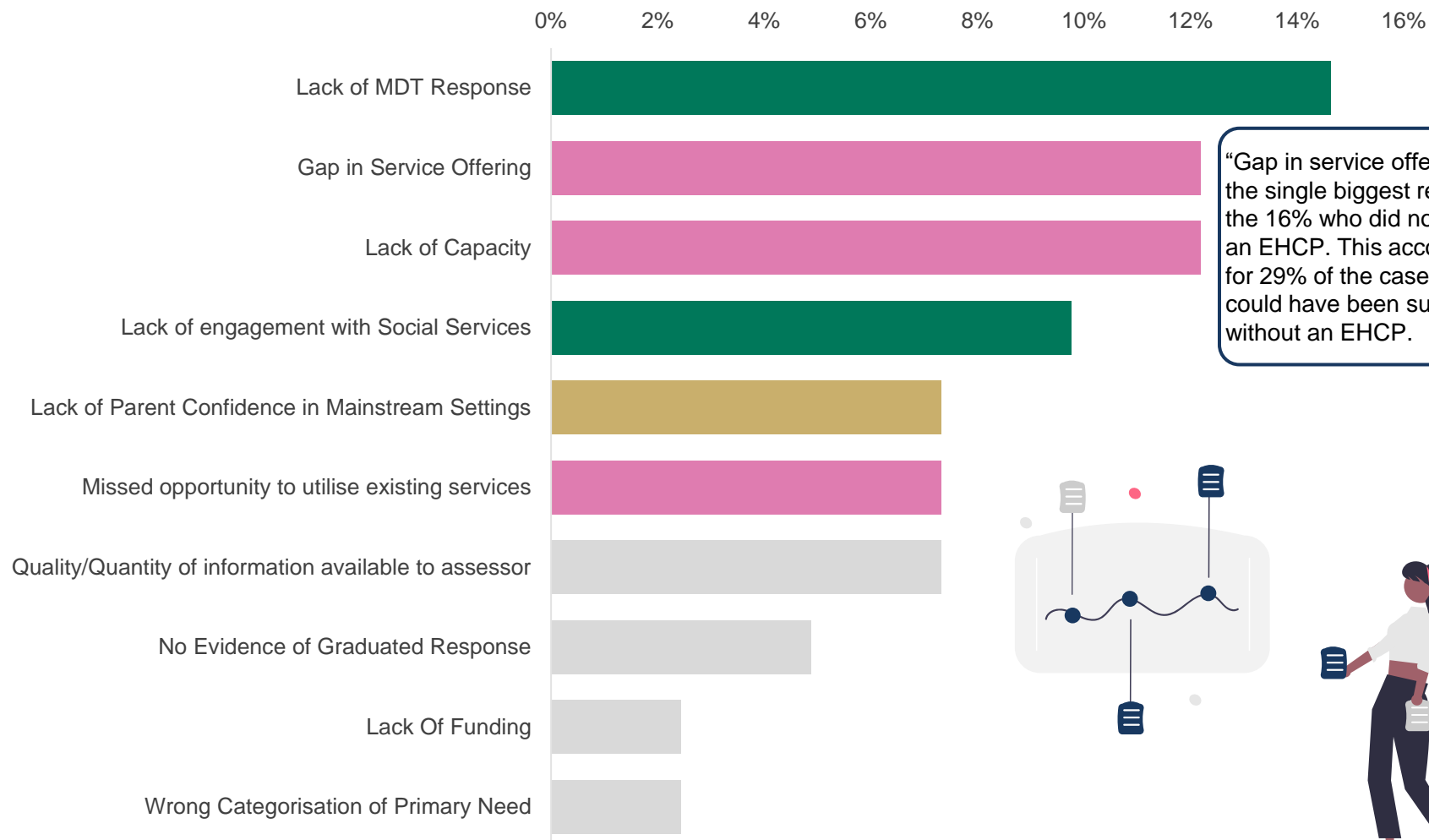
What do parents & carers currently understand about mainstream support? How can we begin to shift this?



Deep Dive 3: Partnership Working



What themes contributed to achieving a non-ideal outcome?



“Gap in service offering” was the single biggest reason for the 16% who did not require an EHCP. This accounted for 29% of the cases that could have been supported without an EHCP.



The results of surveys and analysis will guide what areas need to be addressed to deliver better outcomes and cost avoidance in our three largest cost centres.

Deep Dives



In Module 2's deep dive activities, we went further to understand what we can change to improve outcomes for our CYP



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?



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What do parents & carers currently understand about mainstream support? How can we begin to shift this?



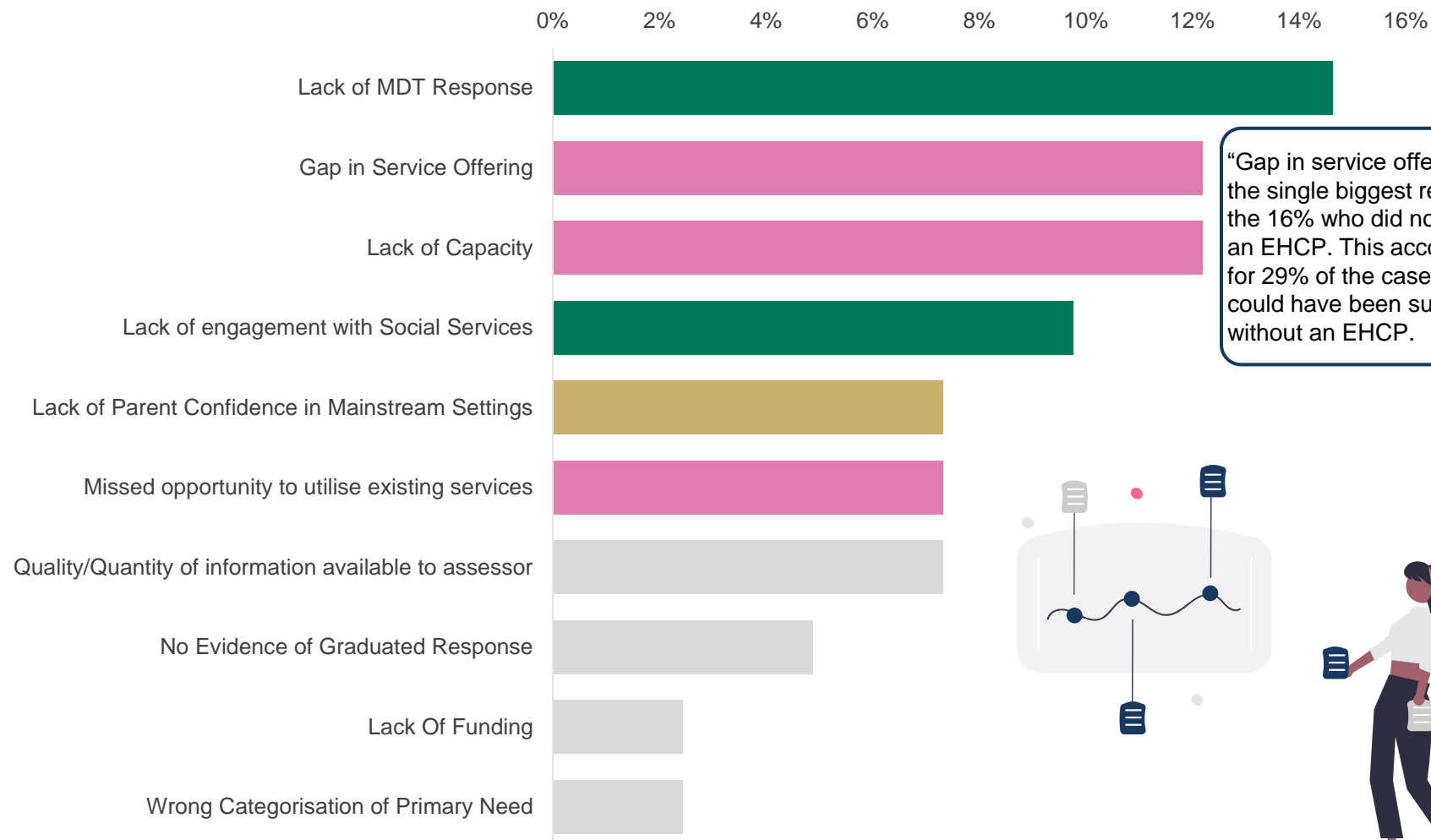
Deep Dive 3: Partnership Working

How can we best collaborate as a SEND network across Tameside?



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What themes contributed to achieving a non-ideal outcome?



“Gap in service offering” was the single biggest reason for the 16% who did not require an EHCP. This accounted for 29% of the cases that could have been supported without an EHCP.



The results of surveys and analysis will guide what areas need to be addressed to deliver better outcomes and cost avoidance in our three largest cost centres.

We surveyed education practitioners to gain holistic insight into service effectiveness and awareness.



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?

Deep Dive 2: Lack of Parent/Carer Confidence

What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Deep Dive 3: Partnership Working

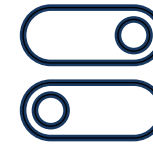
We received **49 responses** from practitioners on questions related to service awareness and perception in Tameside. Parents were also surveyed on similar questions.

Questions centred around the following topics:



Current Practice

Which services are well utilised and have positive impact on outcomes?



Key Levers

What are the top actions to focus on that will improve awareness and utilisation of our most effective services?



Best Approach

What is the most effective way to bring partners together to improve service awareness and utilisation?

Increasing awareness & utilisation of certain existing services can alleviate capacity constraints & boost confidence in other services



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

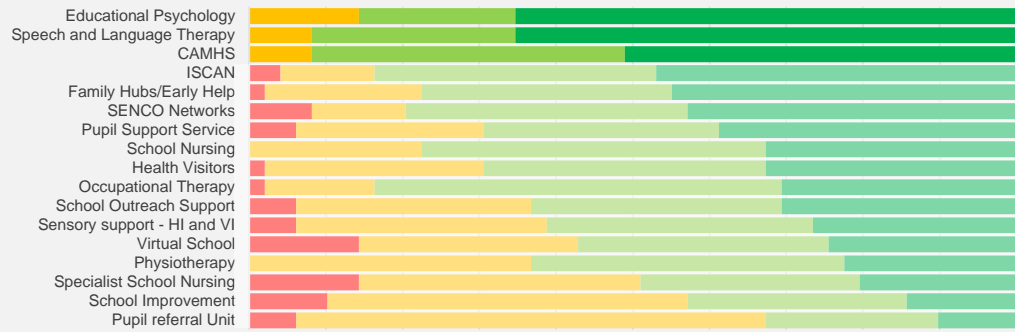


- I am not aware that this service exists
- I am aware that this service exists, but unsure what it does, or how to access it
- I know what this service is/does, and how to access it, but I do not believe it delivers effective outcomes
- I know what this service is/does, but I do not know how to access it
- I know what this service is/does, and how to access it, and I think it delivers effective outcomes

Based on the opinions of **49** practitioners

1

Educational Providers Awareness & Confidence in Services

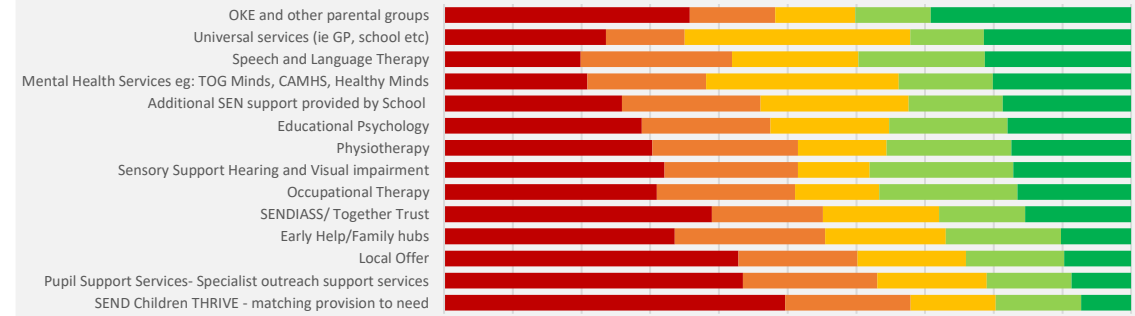


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Practitioners have very good awareness of key services and refer into them regularly

2

Parental Awareness and Confidence in Services



However, parents and carers have less awareness and lower satisfaction with the service offering withing Tameside

3

I've only just received appt from cahms.. the referral was done Yr8, she's leaving [school] now .
Comment from Parent

Transition from primary school to secondary school should be more linked because when in secondary school they get no support
Comment from Parent

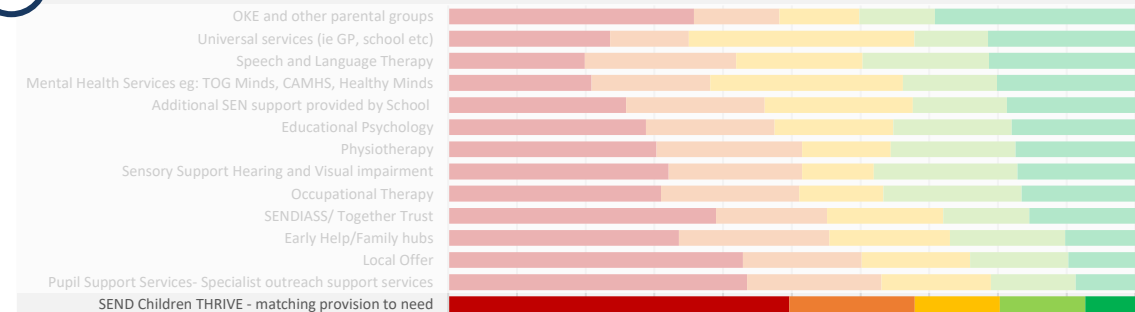
[It is] sometimes difficult to communicate information with parents due to difficulties communicating with SEN team.
Comment from a school headteacher

The waiting list by cahms needs to be severely reduced and the general SEN services need to be severely looked at waiting times of years for appointments is not acceptable
Comment from Parent

Both practitioners and parents recognise capacity limits core service effectiveness, but also worry about service support around transitions

4

Parental Awareness and Confidence in Services



There are some services we know that we should be using to alleviate capacity on existing services and boost parent confidence but they currently lack awareness e.g. THRIVE

Educational practitioners most commonly recommended Educational Psychology and SALT services.



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

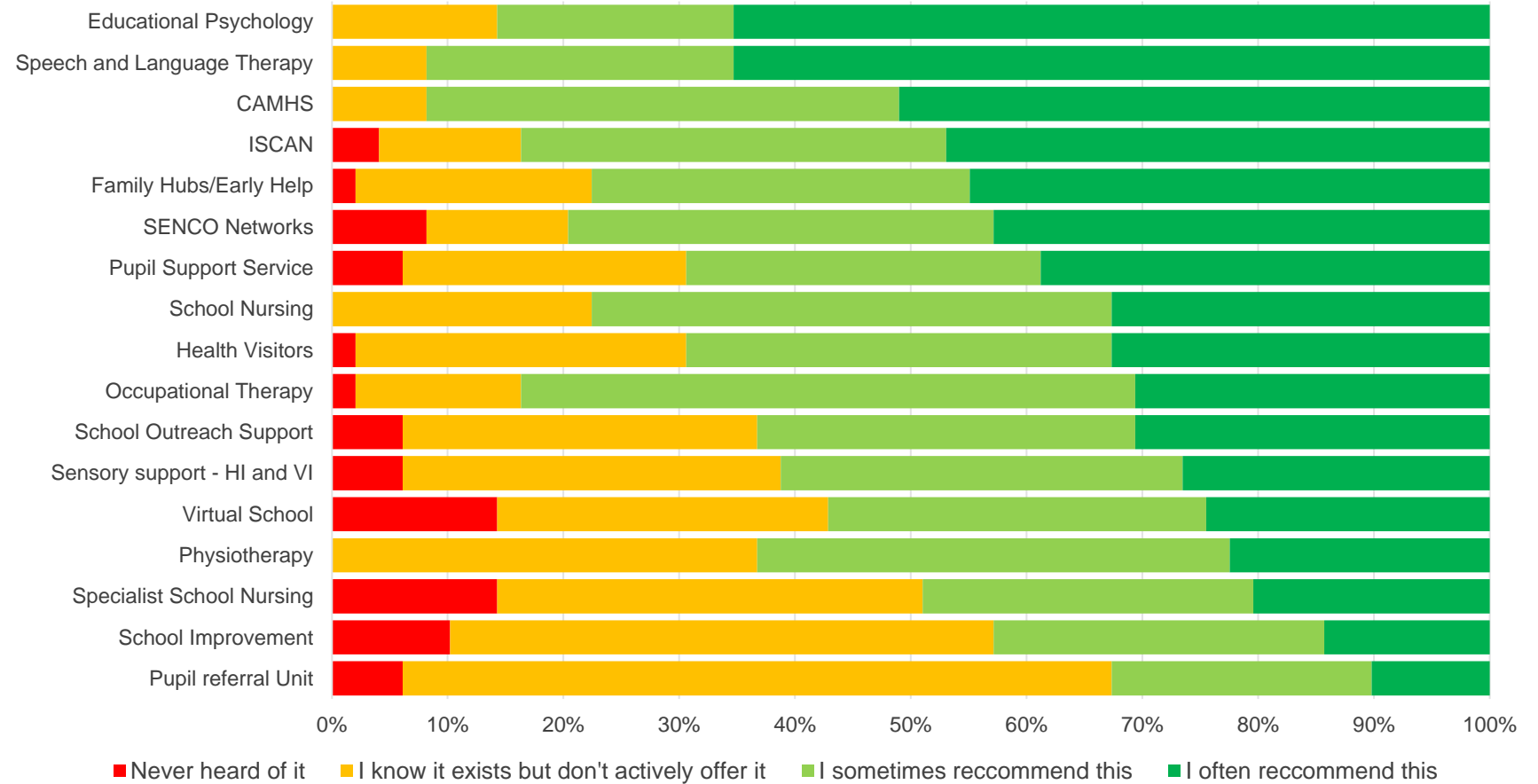
What services do we currently use, how effective are they, and where are the gaps?

Deep Dive 2: Lack of Parent/Carer Confidence

What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Deep Dive 3: Partnership Working

Awareness & Confidence in Services



However, core services face challenges around recruitment and retention, timing, and communication have historically limited the effectiveness of these services.



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?

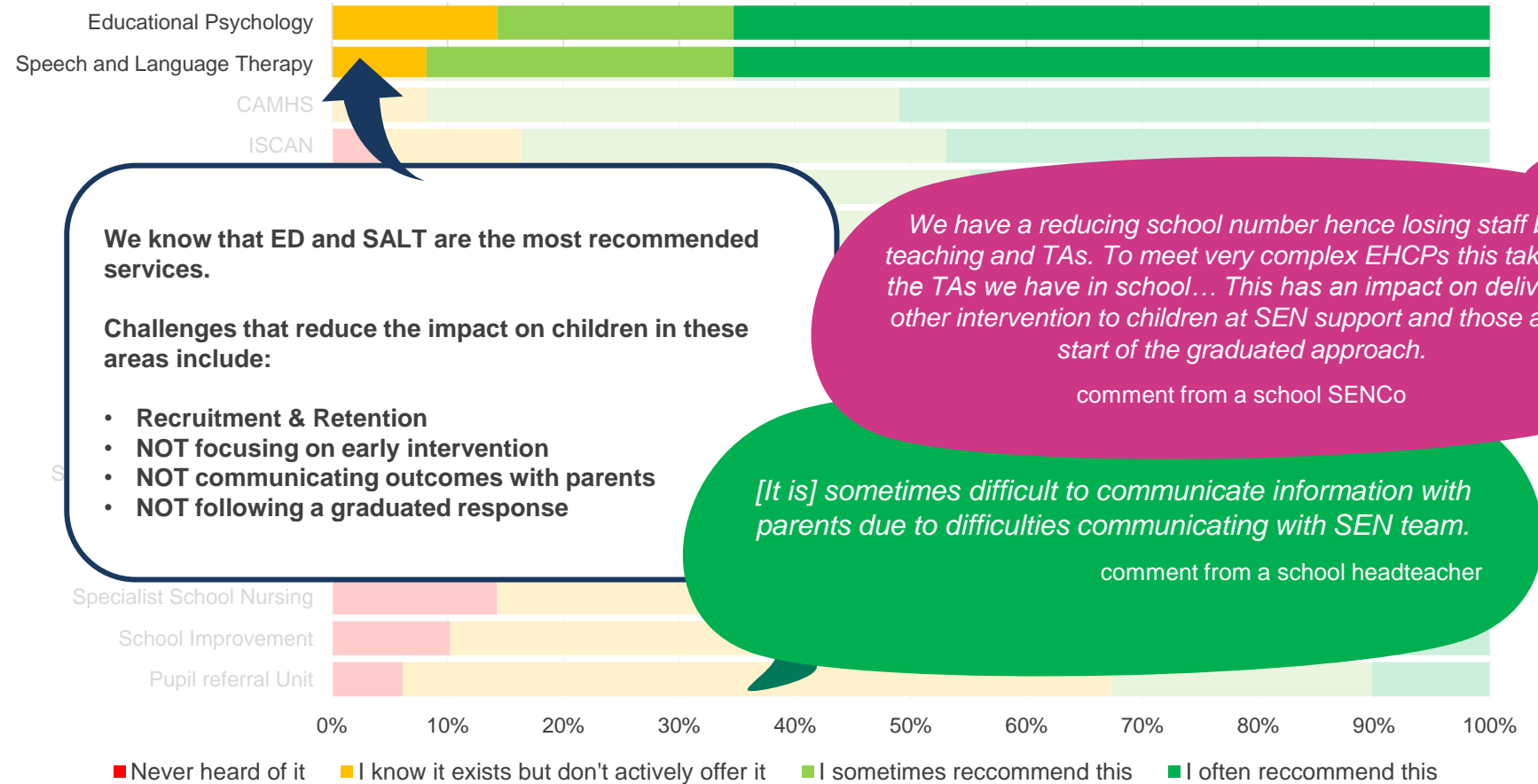
Deep Dive 2: Lack of Parent/Carer Confidence

What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Deep Dive 3: Partnership Working

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Awareness & Confidence in Services



We know that ED and SALT are the most recommended services.

Challenges that reduce the impact on children in these areas include:

- Recruitment & Retention
- NOT focusing on early intervention
- NOT communicating outcomes with parents
- NOT following a graduated response

We have a reducing school number hence losing staff both teaching and TAs. To meet very complex EHCPs this takes all the TAs we have in school... This has an impact on delivering other intervention to children at SEN support and those at the start of the graduated approach.

comment from a school SENCo

[It is] sometimes difficult to communicate information with parents due to difficulties communicating with SEN team.

comment from a school headteacher

We need to ensure our most recommended services are enabled to be as effective as possible.

Another service which was felt to be effective but has historically been very constrained is the Sensory OT service.



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?

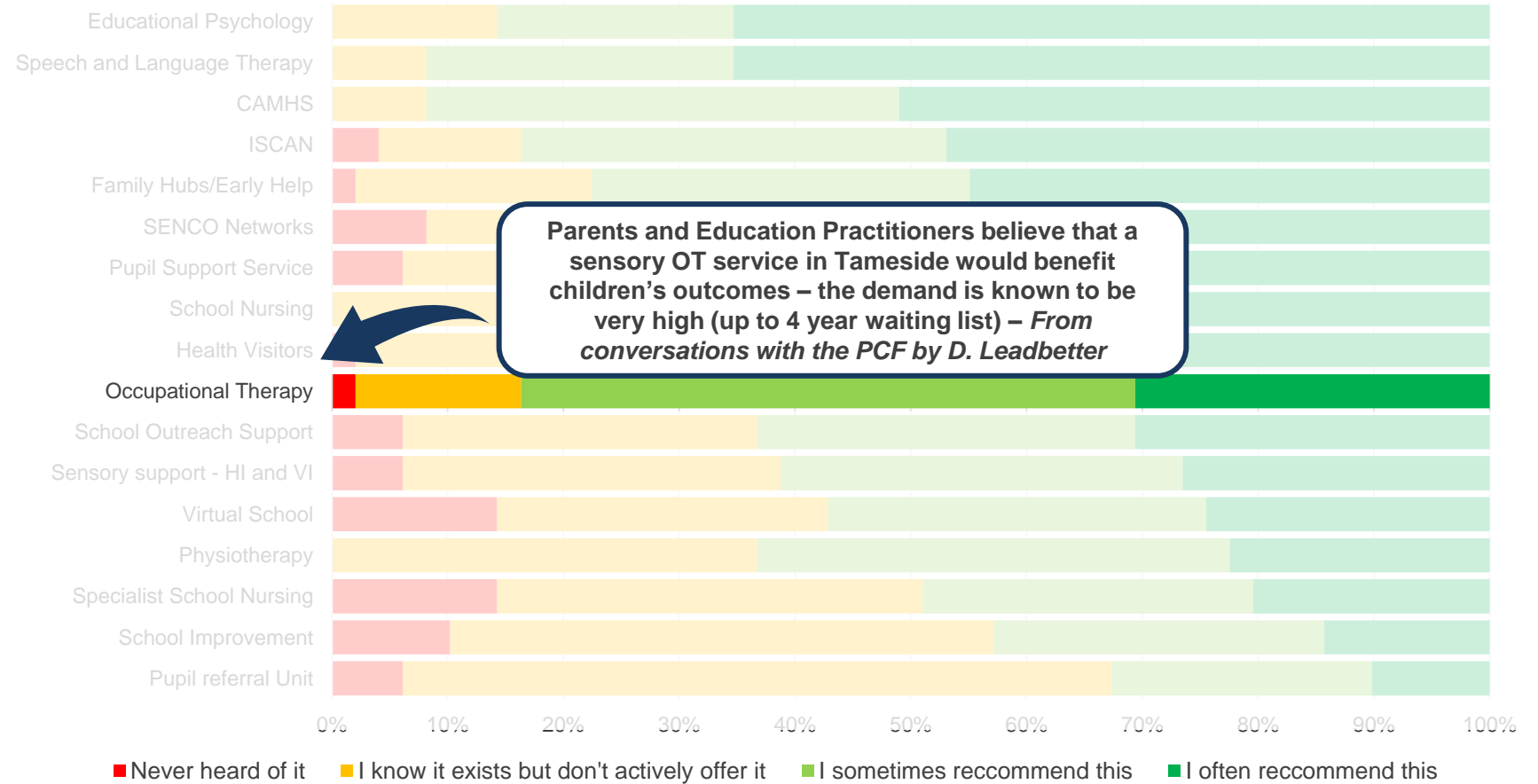
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What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Deep Dive 3: Partnership Working

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Awareness & Confidence in Services



Services are on average are known to less than 50% of parents, which suggests there may be a communication gap between practitioners and parents, and that opportunities to benefit from support may be missed.



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?

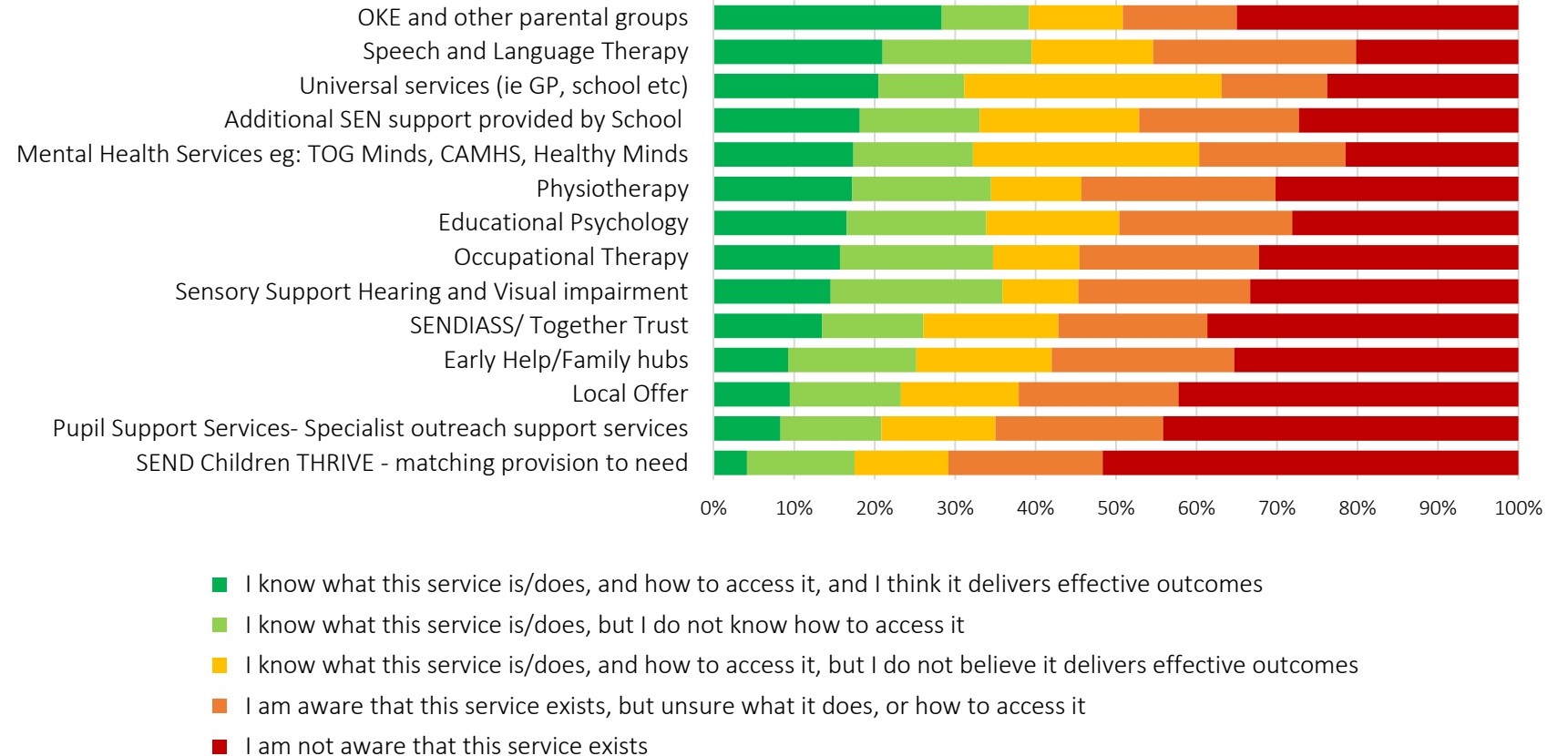
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Deep Dive 2: Lack of Parent/Carer Confidence

What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Deep Dive 3: Partnership Working

Parental Awareness and Confidence in Services



The overall awareness of services is low – we need to prioritise promoting services which are lesser-known and have large potential impact on outcomes.

Even in the services where practitioners had most confidence and awareness, parental knowledge and confidence was low.



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?

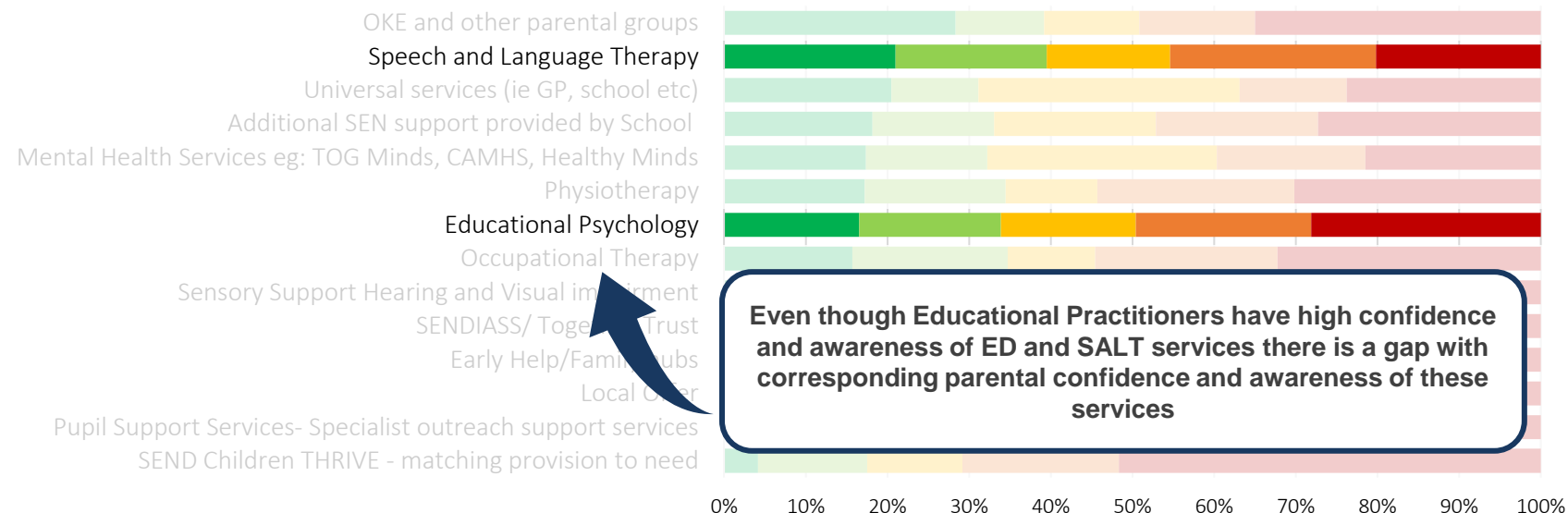
Deep Dive 2: Lack of Parent/Carer Confidence

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Deep Dive 3: Partnership Working

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Parental Awareness and Confidence in Services



Even though Educational Practitioners have high confidence and awareness of ED and SALT services there is a gap with corresponding parental confidence and awareness of these services

- I know what this service is/does, and how to access it, and I think it delivers effective outcomes
- I know what this service is/does, but I do not know how to access it
- I know what this service is/does, and how to access it, but I do not believe it delivers effective outcomes
- I am aware that this service exists, but unsure what it does, or how to access it
- I am not aware that this service exists

Improving confidence and awareness of ED and SALT services with parents can be achieved while improving the service offering.

The THRIVE program is one service where parental awareness and confidence could be considerably increased.



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?

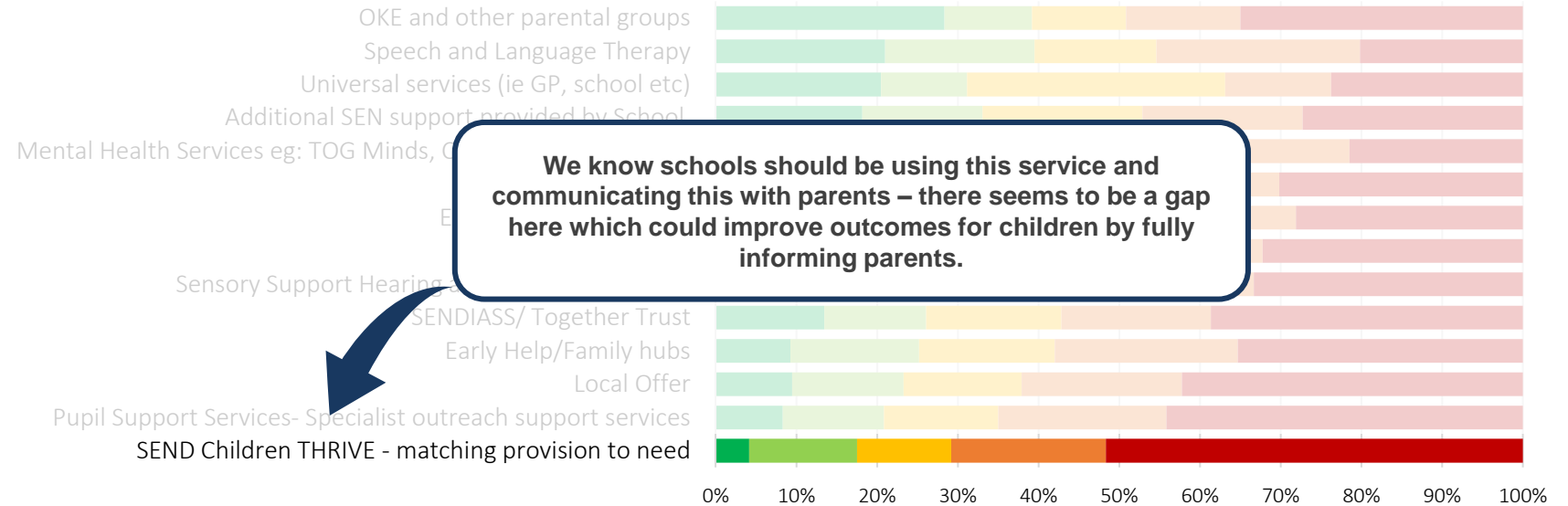
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Deep Dive 2: Lack of Parent/Carer Confidence

What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Deep Dive 3: Partnership Working

Parental Awareness and Confidence in Services



We know schools should be using this service and communicating this with parents – there seems to be a gap here which could improve outcomes for children by fully informing parents.

- I know what this service is/does, and how to access it, and I think it delivers effective outcomes
- I know what this service is/does, but I do not know how to access it
- I know what this service is/does, and how to access it, but I do not believe it delivers effective outcomes
- I am aware that this service exists, but unsure what it does, or how to access it
- I am not aware that this service exists

Bridging the gap in communication between schools and parents about THRIVE is a key way to build parental awareness & confidence.

Pupil Support Services is another area where parents are not generally aware of the local offering.



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?

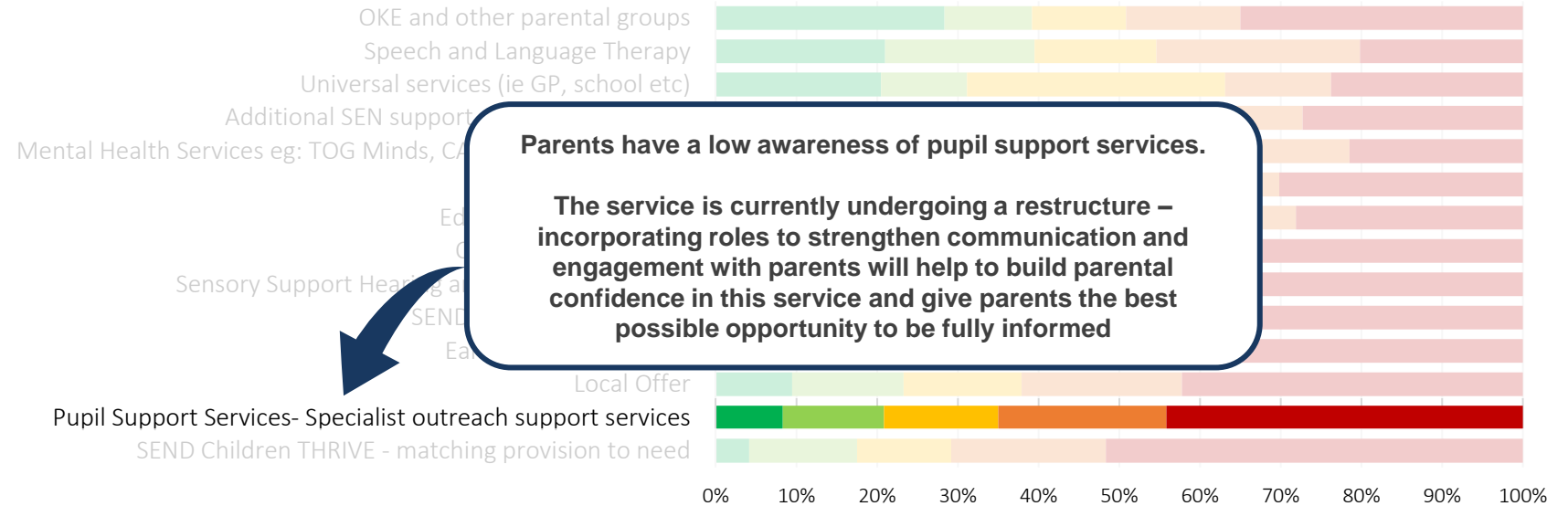
Deep Dive 2: Lack of Parent/Carer Confidence

What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Deep Dive 3: Partnership Working

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Parental Awareness and Confidence in Services



Parents have a low awareness of pupil support services.

The service is currently undergoing a restructure – incorporating roles to strengthen communication and engagement with parents will help to build parental confidence in this service and give parents the best possible opportunity to be fully informed

- I know what this service is/does, and how to access it, and I think it delivers effective outcomes
- I know what this service is/does, but I do not know how to access it
- I know what this service is/does, and how to access it, but I do not believe it delivers effective outcomes
- I am aware that this service exists, but unsure what it does, or how to access it
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Improving parental awareness and confidence in the new specialist support service is important to consider when restructuring the service

The next steps arising from this deep dive will be to improve parent awareness and confidence; and to understand capacity in some key services.



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?

Deep Dive 2: Lack of Parent/Carer Confidence

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Deep Dive 3: Partnership Working



1

Improve parental awareness and confidence in key services

Purpose: Provide confidence to parents and carers in the ability of services to deliver the best outcome for their child – focus initially on methods of communication with THRIVE and Pupil Support Services.



2

Understand the capacity of EP and SALT services

Purpose: Education practitioners often recommend these services – setting up these services to support more children and addressing the gap in parental awareness of these services would improve outcomes for children.

Enabler:

Building **parental awareness of the parental forums/groups first** and **reaching specific parent groups via schools** will provide a **more targeted and sustainable approach** to improving service awareness and utilisation.

We surveyed Parents & Carers to gain specific insight on what influenced their confidence in mainstream settings the most



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

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Deep Dive 3: Partnership Working

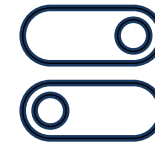
Case reviews highlighted that supporting parental confidence in mainstream settings was a driving factor behind non-ideal outcomes for children in MSS. 29% of MSS CYPs sampled in Case Review would have been in a more ideal placement in Mainstream settings. We have therefore surveyed **over 270** parents and carers to better understand what the key drivers are behind their perceptions.

Questions centred around the following topics:



Current Practice

What were the reasons influencing decisions not to go to mainstream?



Key Levers

What are the top actions that parents want us to focus on?



Best Approach

What is the most effective way to bring partners together to improve parental confidence?

The direct responses of parents will be used to prioritise which support we can put in place to promote parental confidence in mainstream settings.

More support and staff capability would increase parent and carers confidence to keep their children in Mainstream Settings



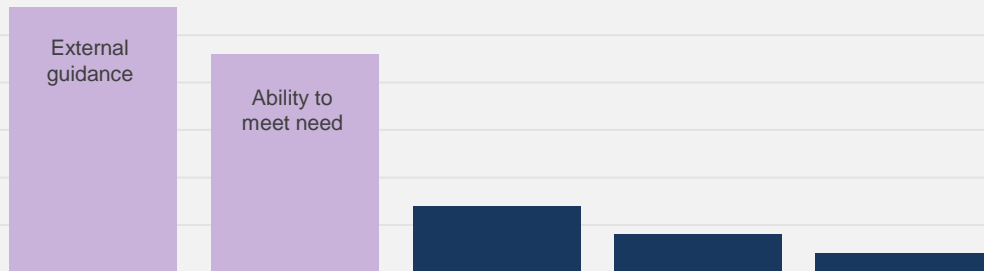
Deep Dive 2: Lack of Parent/Carer Confidence in Mainstream setting



Based on the opinions of over **270** parents and carers

1

Why did your child / young person move from mainstream school to a special school?

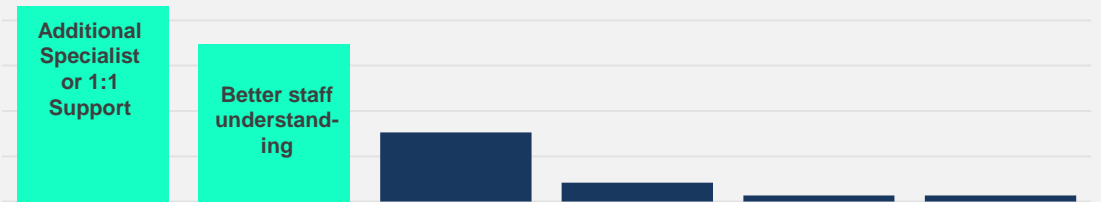


The main reasons given by parents for their CYPs moving to special school are around **external guidance and mainstream ability to meet need**

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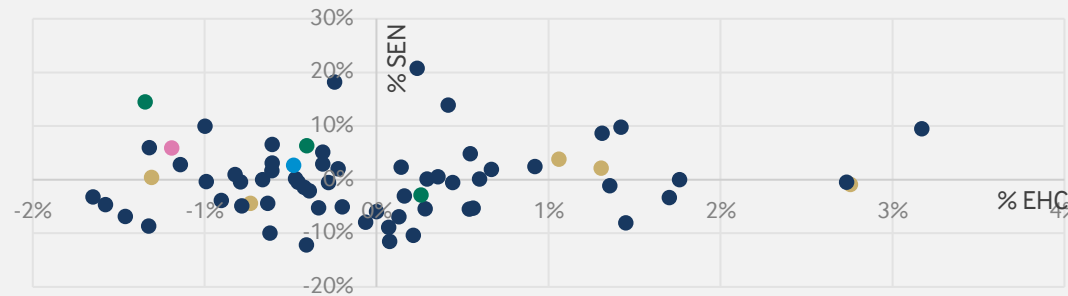
2

What would need to change in mainstream settings to support my child's needs?



More **Specialist or 1:1 support and better staff understanding** were cited as key changes needed to give parents confidence in mainstream settings

3



There is no clear metric which demonstrate which schools might have best inclusive practice and therefore where parents might be most confident

Measuring Parental Confidence by school enables us to highlight best practices in more inclusive schools to share with the rest of the LA

Guidance & needs not being met were the leading reasons why CYPs were moved from Mainstream Schools to MSS



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

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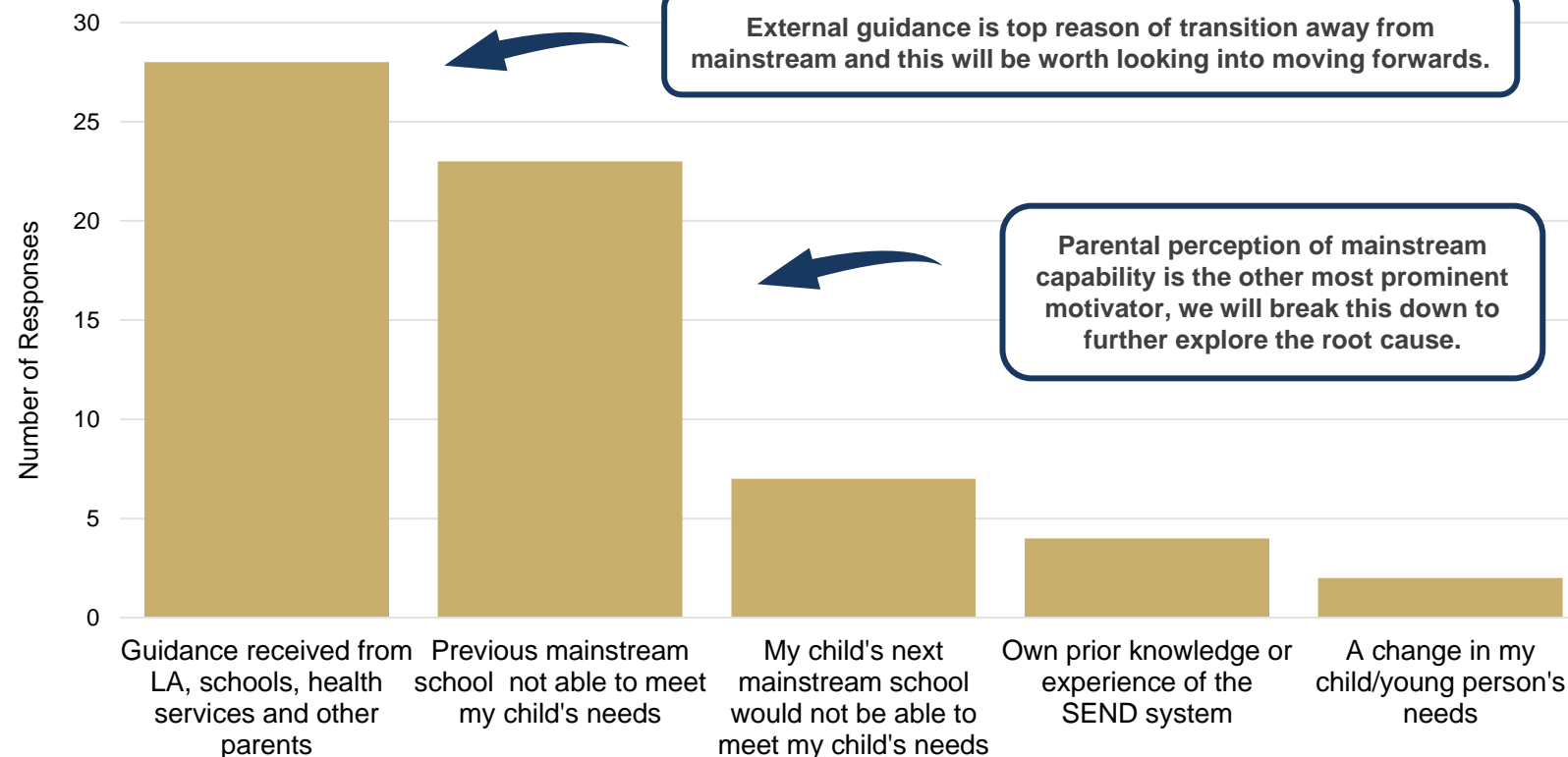
Deep Dive 2: Lack of Parent/Carer Confidence

What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Deep Dive 3: Partnership Working

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Why did your child / young person move from mainstream school to a special school?



We need to understand more about what guidance parents are receiving and why mainstreams school might struggle to meet need

Having additional 1:1 and specialist support would have the greatest impact on parental confidence in mainstream schools



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

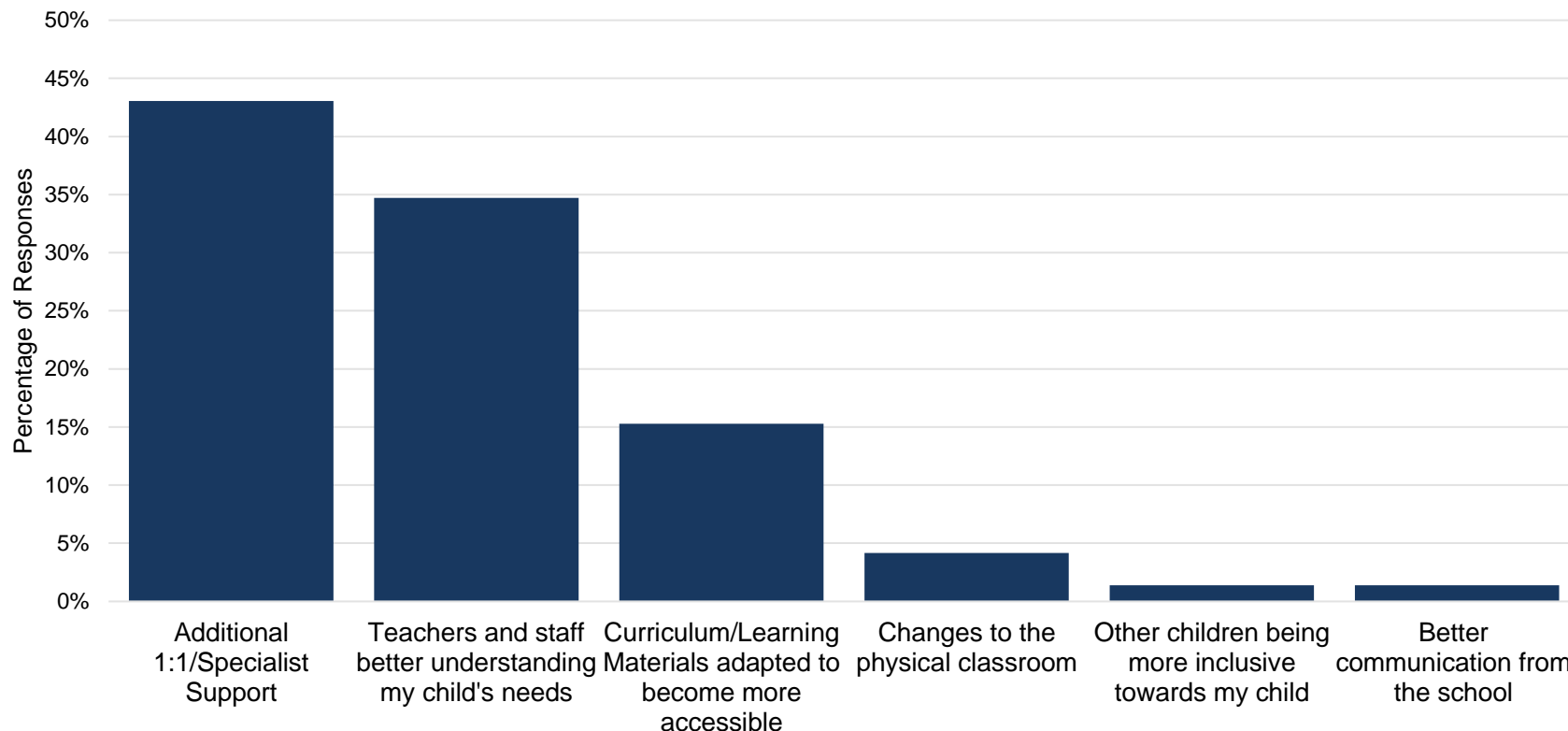
What services do we currently use, how effective are they, and where are the gaps?

Deep Dive 2: Lack of Parent/Carer Confidence

What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Deep Dive 3: Partnership Working

What would need to change in mainstream settings to support my child's needs?



We can increase parental confidence in mainstream settings by focussing on availability of specialist support and teacher understanding of supporting SEND learners

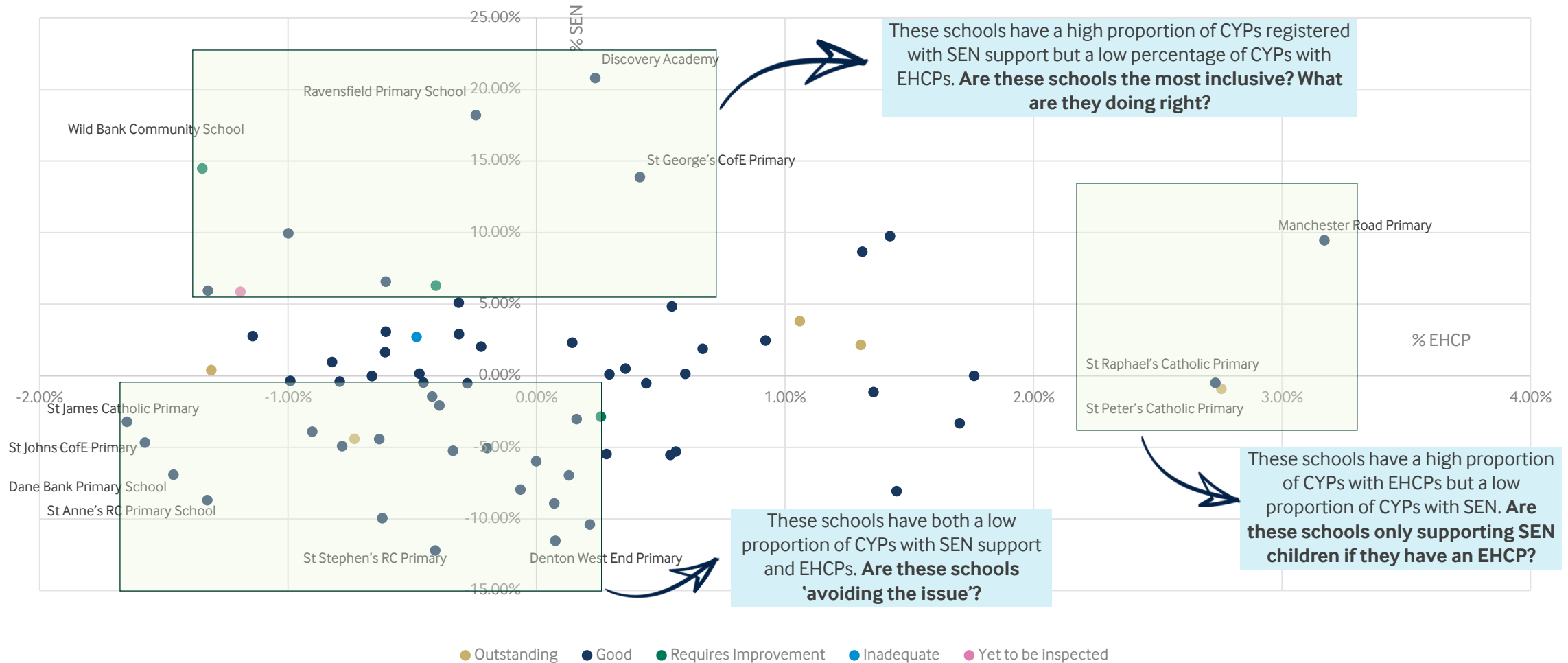
There is evidence of some primary schools that are supporting more children with SEND needs – does this variability impact confidence?



Comparing the proportion of pupils with SEN support plans, and EHCPs in primary schools shows significant variation. The schools are sorted by OFSTED rating. Schools with resource bases have been excluded. **The centre of the graph (0%, 0%) shows the average EHCP and SEN support rates in this cohort.**

Primary Schools

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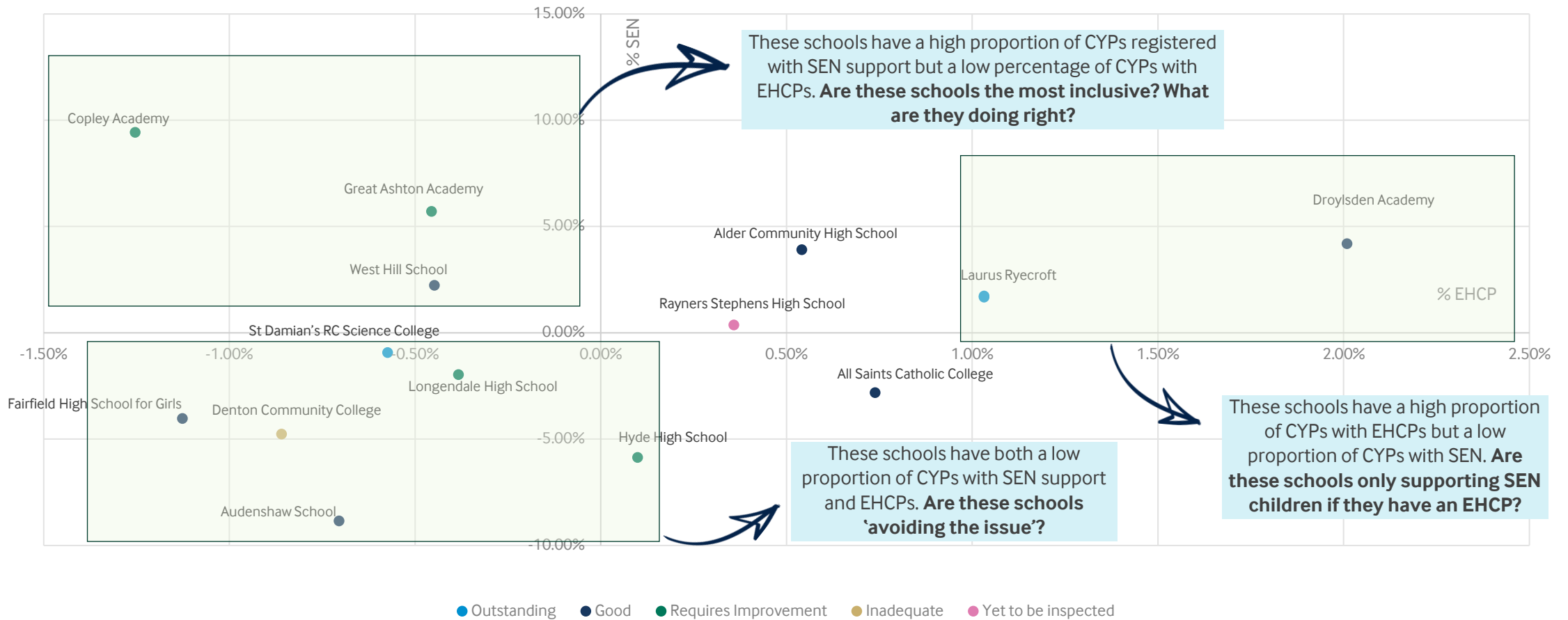
This variation is similarly evident in secondary schools



Comparing the proportion of pupils with SEN support plans, and EHCPs in secondary schools shows significant variation. The schools are sorted by OFSTED rating.

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Secondary Schools



We can use this analysis to discuss which schools might have the best practices, as well as which school may be advising parents to look towards specialist provisions

Focusing on external guidance and understanding children's needs will improve parental confidence in mainstream schools



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?

Deep Dive 2: Lack of Parent/Carer Confidence

What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Deep Dive 3: Partnership Working



1

Understand perspective of schools, health and other services

Purpose: We see external guidance as the biggest contributor to parental preference in transitioning away from mainstream. It is important to understand what / who is causing this.

Enabler:

Understand whether issues around mainstream ability to meet need are based around communication between professionals and parents or a belief that professionals cannot meet need for these CYPs



2

Share best practice of understanding SEND needs

Purpose: The most effective way within our current system is to increase education providers' understand of children and young people's SEND needs. This would allow them to adjust time, resources, and curriculum accordingly, improving parental confidence.

Enabler:

Connect good performing schools and learn from their experience in understanding SEND needs. Share the best practices across the system.

Deep Dive 3 – Partnership Working



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

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Deep Dive 3: Partnership Working

Partnership working impacts decisions on how best to meet the needs of children. These critical points include the decision to issue an EHCP and the annual review process that follows. Looking at how partnership working is being applied within the **Annual Review process** was selected to highlight how services could work together to deliver the best possible outcomes for children.



An MDT range of specialists will be consulted, including; LA Services, Schools and Parent & Carer representatives.



Visualize the Process

Outline the process and the steps involved



Identify Pain Points

Highlight the issues that stop the process delivering the best outcome for a CYP



Prioritise Changes

Evaluate changes based on their impact and complexity of tackling them

Partners focussed on current Annual Review process to identify areas where better collaboration was possible



Deep Dive 3: Partnership Working



Based on Half-Day workshop with 17 attendees from **15 different specialities** across SEND

More easily addressable issues

EHCP format and accessibility



Issue: PDF format makes EHCPs hard to update and edit for ARs. This waste practitioner times and reduce likelihood of proper completion

Action: EHCPs to be shared in word format

EHCP consistency of completion



Issue: Varying levels of compliance and completion of key questions between different services and schools makes the process more time consuming

Action: School and service framework designed to get consistent level of 'what good looks like' EHCPs

EHCP validity and relevance



Issue: Some EHCPs become out of dates due to lack of updates which causes parental frustration

Action: Schools to have One Page profile for CYPs which can be updates to show voice and progress.

Digital portal for SEND Access

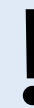


Issue: Egress system currently no fit for purpose. "Egress gives me so much stress and anxiety"

Action: New digital system currently being trialled

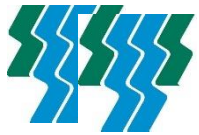
Longer term areas to investigate

- Staff training around Annual Review process and understanding
- Staff capacity and attrition
- SENCO capacity to focus on ARs
- Information transfer after transition point
- Parental mindset and culture towards ARs and EHCPs



We have the opportunity to explore inclusive practice and training within schools and transition points in current proposed DBV workstreams

Deep Dives Summary – Next Steps



Deep Dive 1: Gap in Service Offering & Utilisation of Existing Services

What services do we currently use, how effective are they, and where are the gaps?

Investigation

Surveys of parents & carer's awareness and education provider recommendations

Prioritised Next Steps

1. Focus first on parental awareness of parent forums & services
2. Reduce the gap in parental awareness and use of EP and SALT services
3. Focus on other services identified with lowest parental awareness

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Deep Dive 2: Lack of Parent/Carer Confidence

What do parents & carers currently understand about mainstream support? How can we begin to shift this?

Investigation

Surveys of parents & carers awareness and variation analysis of schools

Prioritised next steps

1. Understand where concerns regarding mainstream ability to meet need stem from to better understand driver of 'external guidance' to specialist provision.
2. Share best practice between school on inclusive approaches

Deep Dive 3: Partnership Working

Process review workshop on the Annual Review process

Investigation

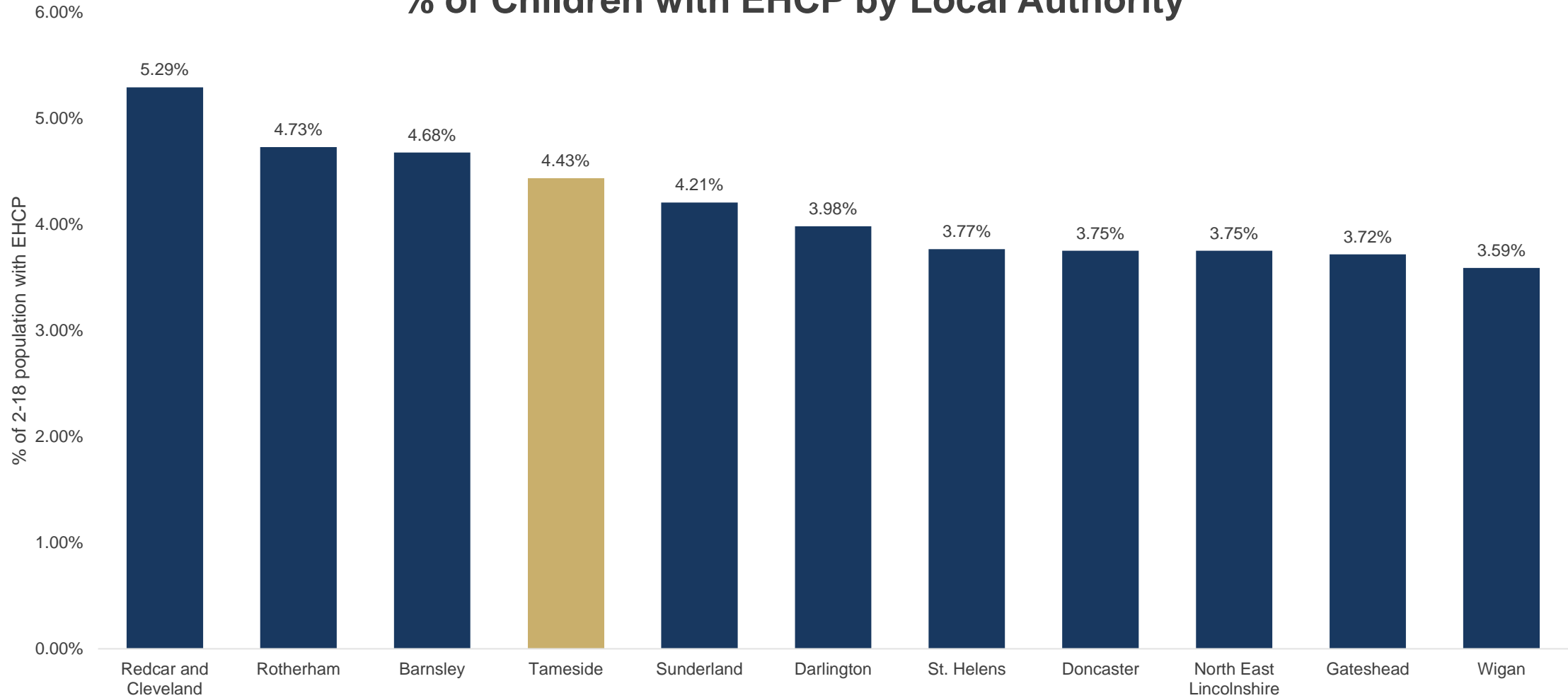
Detailed Approach

1. Progress changes to accessibility, validity and consistency of EHCPs
2. Further understand some of the drivers around the capacity and capability blockers to effective annual reviews

Tameside has the fourth highest percentage of EHCPs relative to its 2-28 population out of all stat neighbours.



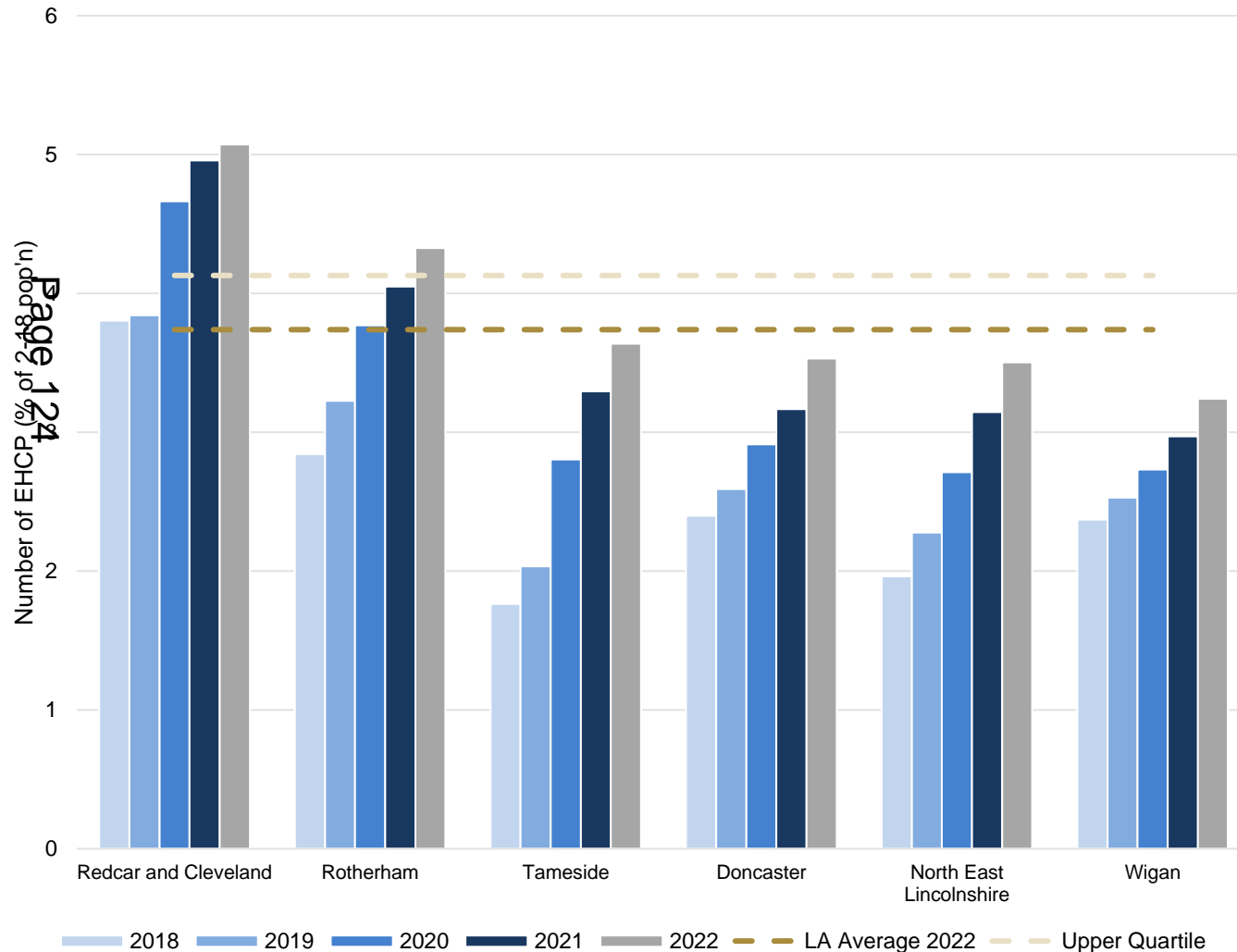
% of Children with EHCP by Local Authority



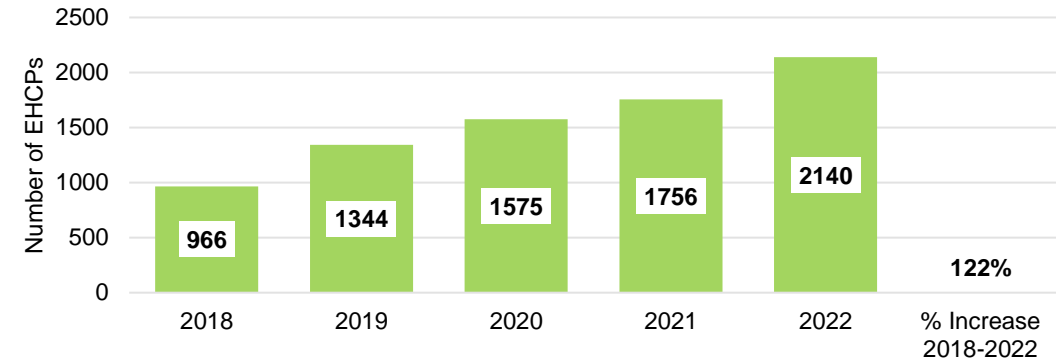
Among close statistical neighbours, Tameside has had the largest year-year percentage increase in the number of EHCPs supported between 2018 and 2022.



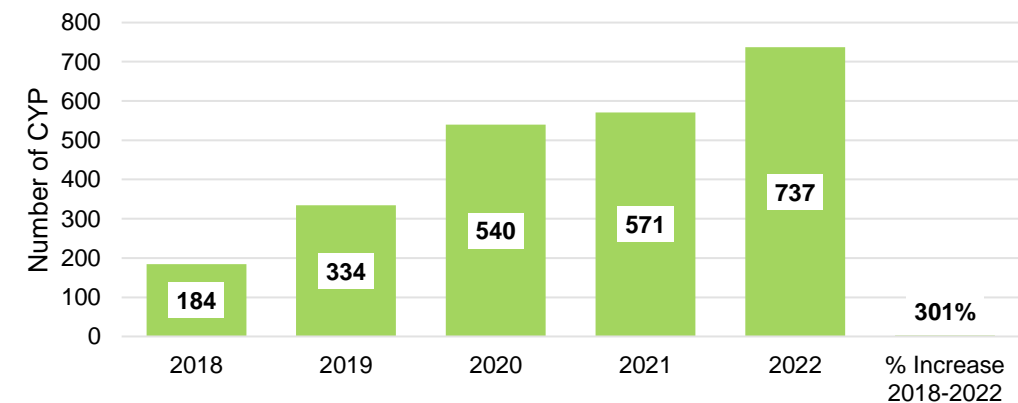
Number of EHCPs per 100 2-18 pop'n



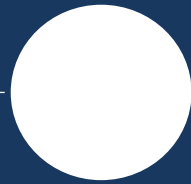
Number of EHCPs over time



Number of Mainstream Placements over time



Financial Forecasts



Unmitigated Forecast Methodology

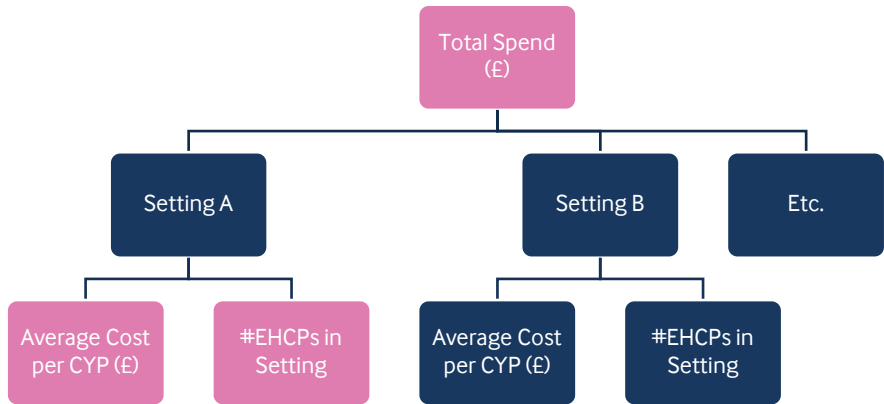


What? Understand likely future movement of key operational measures in an unmitigated scenario and how this translates into financial forecasts (e.g. DSG deficit).



How? Worked alongside relevant Finance and Service staff, understanding and building on existing forecasts by reviewing granular assumptions and projection methods, suggesting revisions where appropriate to meet best practice.

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To understand how overall spend will likely change we need to understand how the two drivers of 'average cost' and '#EHCPs' are trending and build a forecast that predicts what will happen in future.

Projected Future Cost in Setting A



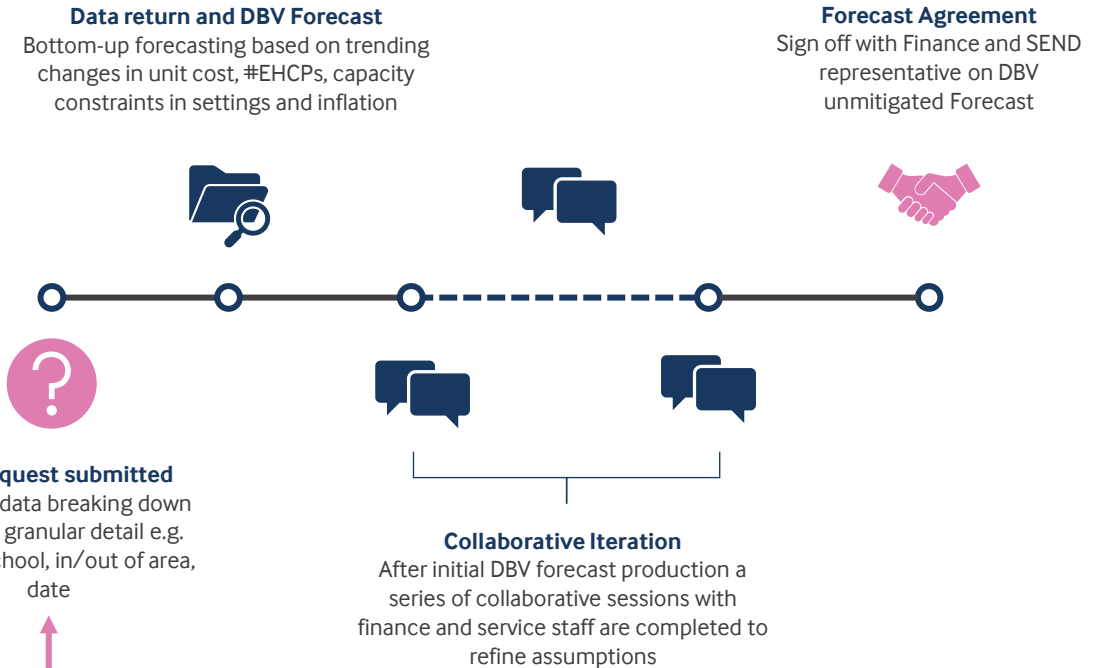
Projected Average Cost per CYP

Including inflation and agreed increased funding to schools



Projected #children in Setting A

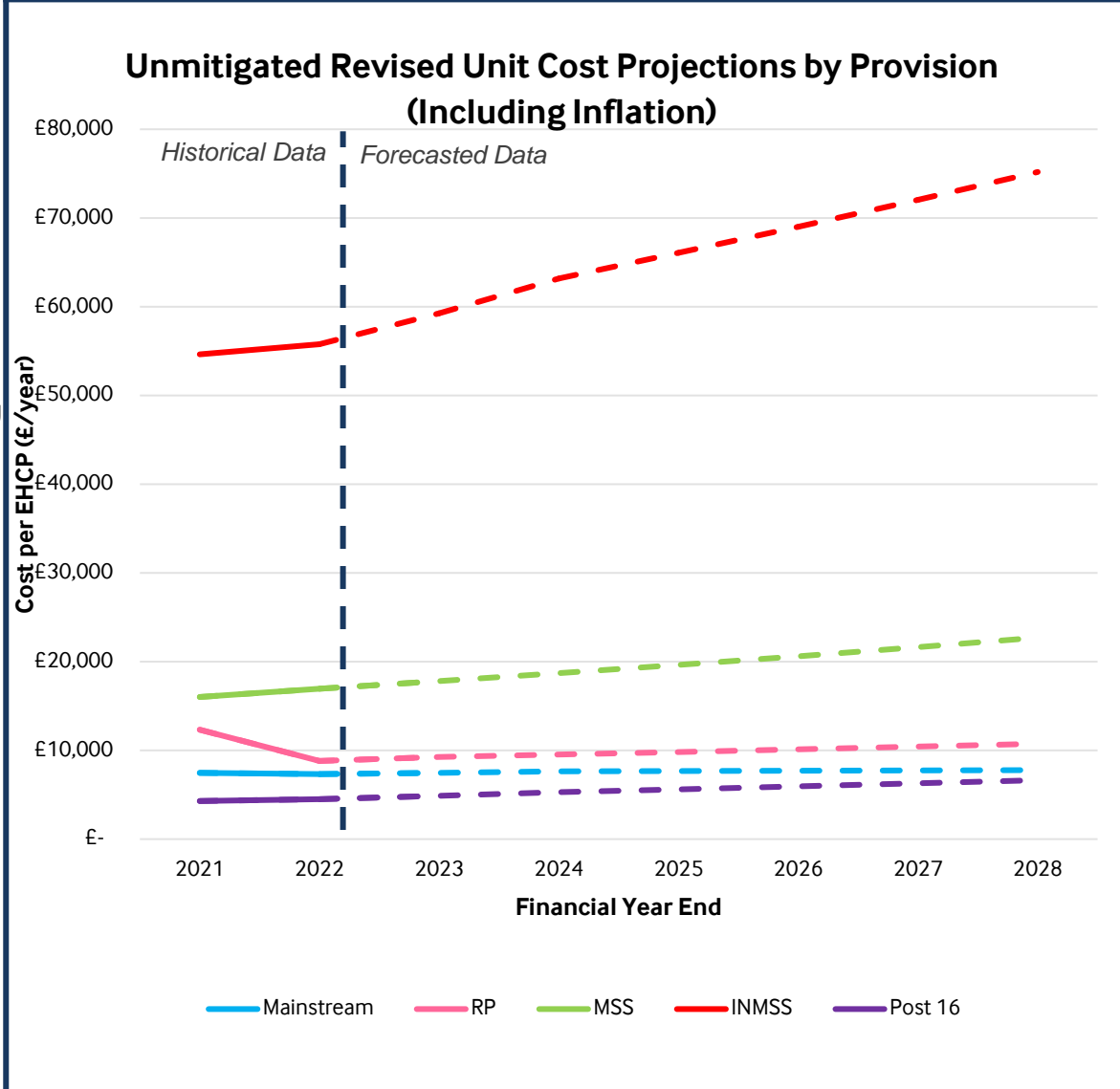
Including current capacity and future capacity of provisions, schools and underlying population growth



Unit cost Forecast per provision: Forecasts suggest INMSS unit cost will increase by 35% by 2028 (LB and UB scenarios)



Unmitigated Revised Unit Cost by Provision



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Assumptions

- Pre-inflation linear increase from 2021 to 2022 used to forecast going forwards for all provision except RP and MSS, where an assumed 3% inflation rate is used. This is because the rates are set by Tameside, and this has been agreed as the most realistic scenario.
- “Natural” inflation rates (based on historic published inflation rates and predicted future rates) are then factored in.

Revised & Inflated Unmitigated Unit Costs (£ per CYP)

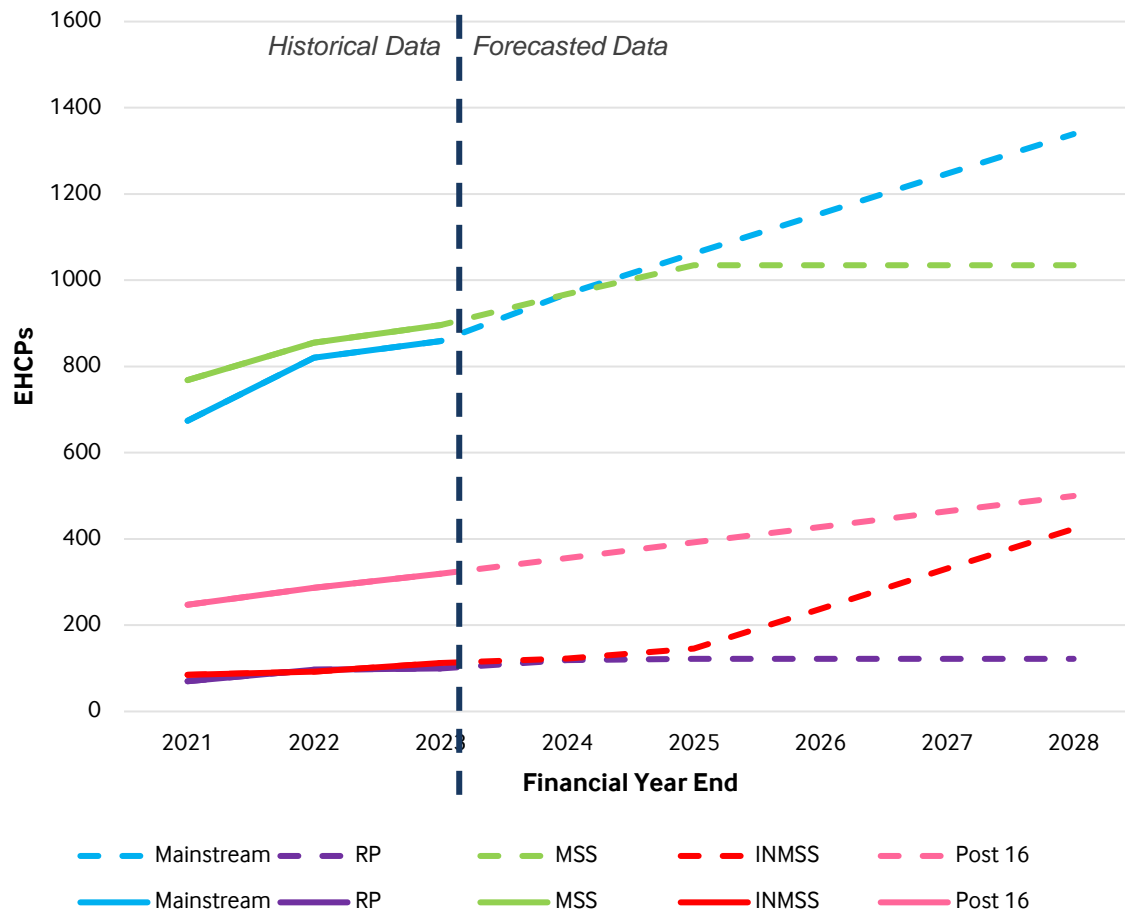
Provision	2021	2022	2023	2024	2025	2026	2027	2028
Mainstream	£7,471	£7,305	£7,441	£7,620	£7,659	£7,699	£7,740	£7,783
RP	£12,321	£8,806	£9,246	£9,523	£9,809	£10,103	£10,406	£10,718
MSS	£16,008	£16,950	£17,797	£18,687	£19,621	£20,602	£21,632	£22,714
INMSS	£54,623	£55,761	£59,254	£63,206	£66,072	£69,024	£72,064	£75,196
Post 16 Provision	£4,297	£4,480	£4,854	£5,270	£5,599	£5,937	£6,285	£6,644

EHCP Forecast per provision: Caseload growth in INMSS is predicted to rise sharply when MSS hits capacity in 2025



Unmitigated EHCP Projections by Provision

Unmitigated Revised EHCP Projections by Provision (Constrained)



Assumptions

- Linear increase from 2021 to 2023 used to forecast going forwards
- Capacity constraints for RP have been assumed to be 122 places on an ongoing basis – new EHCPs are assumed to flow into MSS when at capacity. When MSS at capacity, flow is expected into INMSS.
- MSS capacity set at 1035 (in-borough 874 and out of borough 161) – assume that new EHCPs flow into INMSS when at capacity

Forecast Number of EHCPs by Provision

Provision	2021	2022	2023	2024	2025	2026	2027	2028
Mainstream	674	820	859	969	1062	1154	1247	1339
RP	70 (58)	97 (105)	100 (122)	119 (122)	122 (122)	122 (122)	122 (122)	122 (122)
MSS	768 (870)	855 (913)	896 (1035)	968 (1035)	1035 (1035)	1035 (1035)	1035 (1035)	1035 (1035)
INMSS	85	92	112	123	146	238	331	423
Post 16 Provision	247	287	319	356	392	428	464	500
Total	1844	2151	2286	2536	2757	2978	3199	3420

How do linear capacity constraints change our forecasted EHCPs across provisions?



Scenario 1: UB Fixed Capacity Constraints

- Capacity Constraints for EHCPs in RP and MSS are fixed at 2023 Capacity from 2023 onwards. (122 and 1035 respectively)
- EHCP projections are purely linear and not fixed against school population

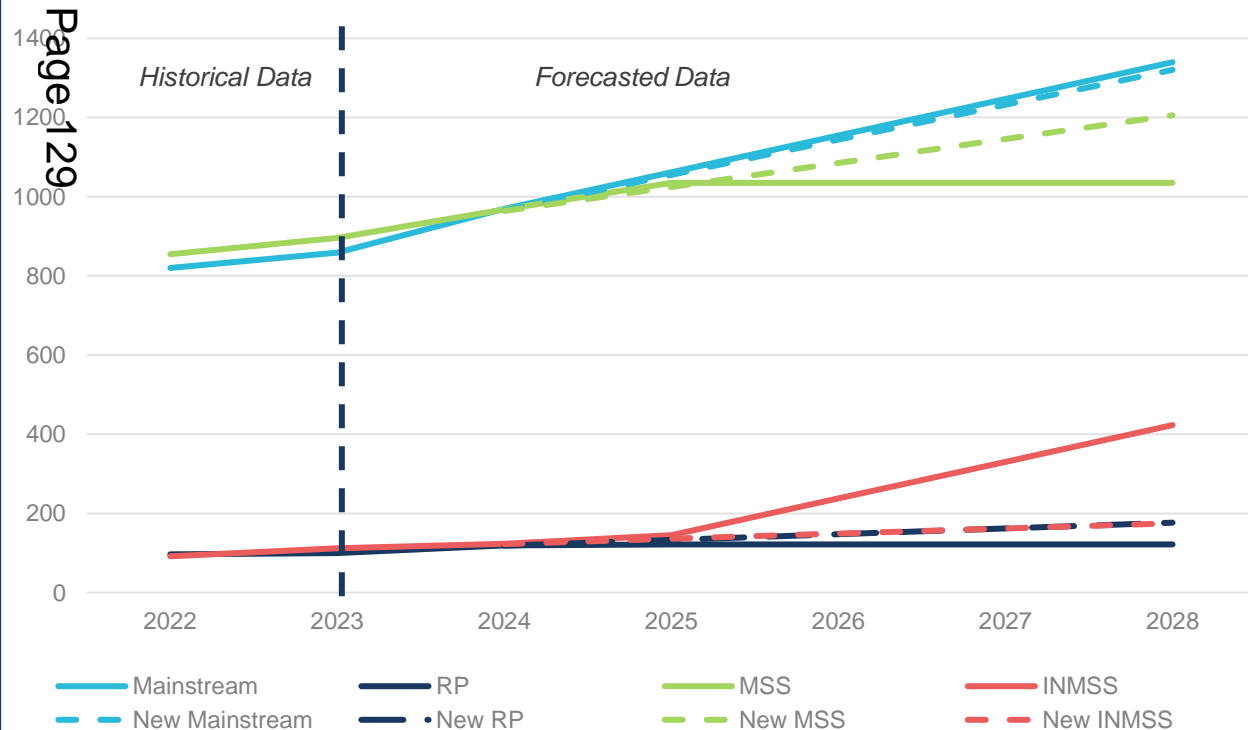
NEW: Scenario 2: LB Linear Capacity Constraints

- Capacity Constraints for EHCPs in RP and MSS are assumed to grow linearly in line with Historic Capacity constraint growth from FYE 20 to FYE 23.
- EHCP projections are fixed against school populations, and the % of total school population in each provision is expected to continue to grow linearly at historic growth rates (FYE 20 – FYE 23)

Unmitigated Expenditure Forecast

Dotted line represents New, scenario 2 forecasted value. Solid line represents previous, scenario 1 values

Comparison of Unmitigated EHCPs across provisions depending on capacity constraints



Fixed Constraint Unmitigated EHCPs (Capacity constraints in brackets)

Provision	2021	2022	2023	2024	2025	2026	2027	2028
Mainstream	674	820	859	969	1062	1154	1247	1339
RP	70 (58)	97 (105)	100 (122)	119 (122)	122 (122)	122 (122)	122 (122)	122 (122)
MSS	768 (870)	855 (913)	896 (1035)	968 (1035)	1035 (1035)	1035 (1035)	1035 (1035)	1035 (1035)
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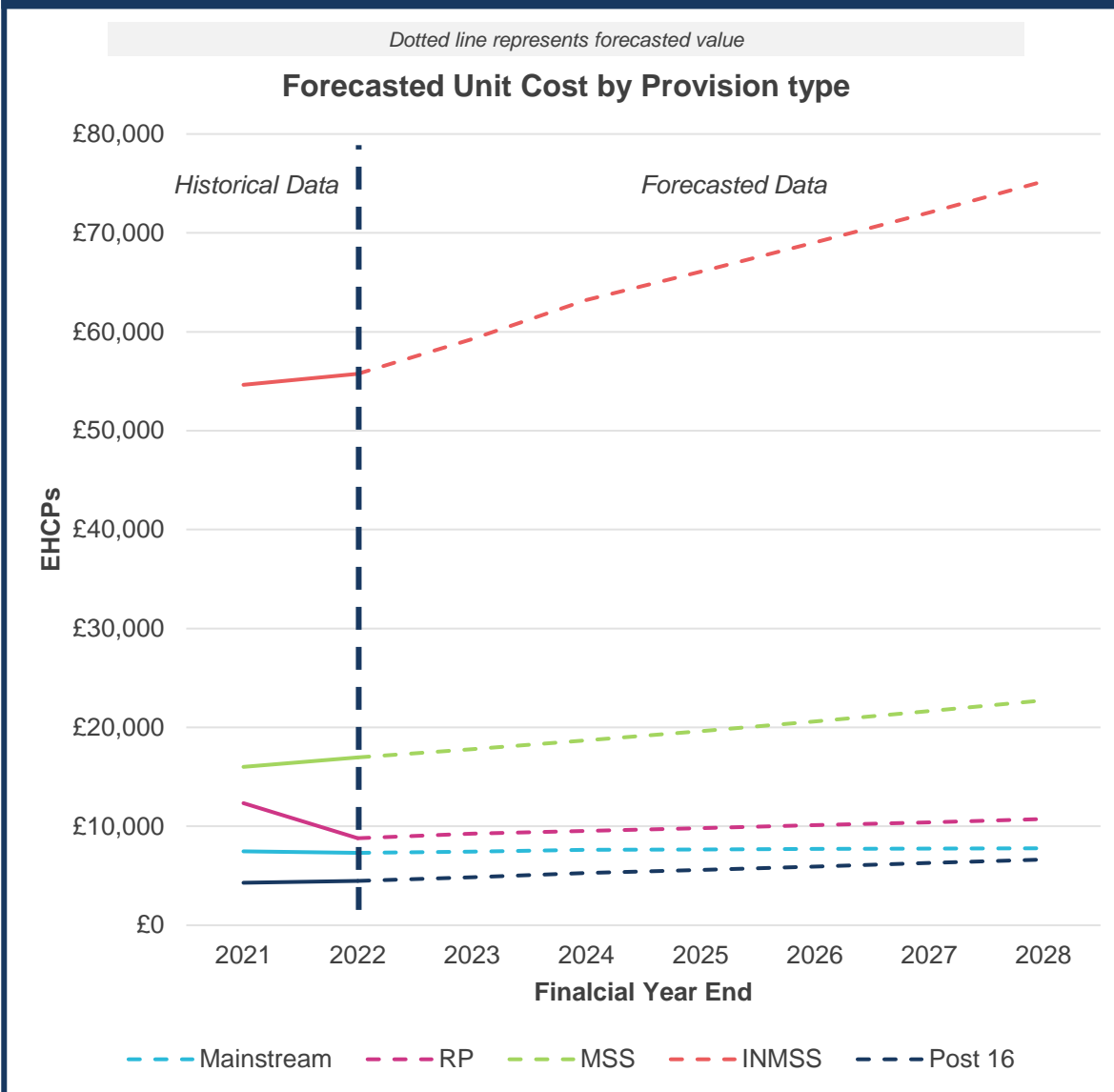
NEW: Linear Constraint Unmitigated EHCPs (Capacity constraints in brackets)

Provision	2021	2022	2023	2024	2025	2026	2027	2028
Mainstream	674	820	859	966	1055	1144	1232	1320
RP	70 (58)	97 (105)	100 (122)	119 (174)	133 (191)	148 (216)	162 (242)	177 (267)
MSS	768 (870)	855 (913)	896 (1035)	964 (1108)	1025 (1214)	1085 (1311)	1145 (1409)	1205 (1506)
INMSS	85	92	112	123	136	149	162	175
Post 16	247	287	319	355	390	424	459	493
Total	1844	2151	2286	2526	2738	2950	3160	3370

The new scenario does not change forecasted unit costs



Unmitigated Revised Unit Cost by Provision



Assumptions

- Pre-inflation linear increase from 2021 to 2022 used to forecast going forwards for all provision except RP and MSS, where an assumed 3% inflation rate is used. This is because the rates are set by Tameside, and this has been agreed as the most realistic scenario.
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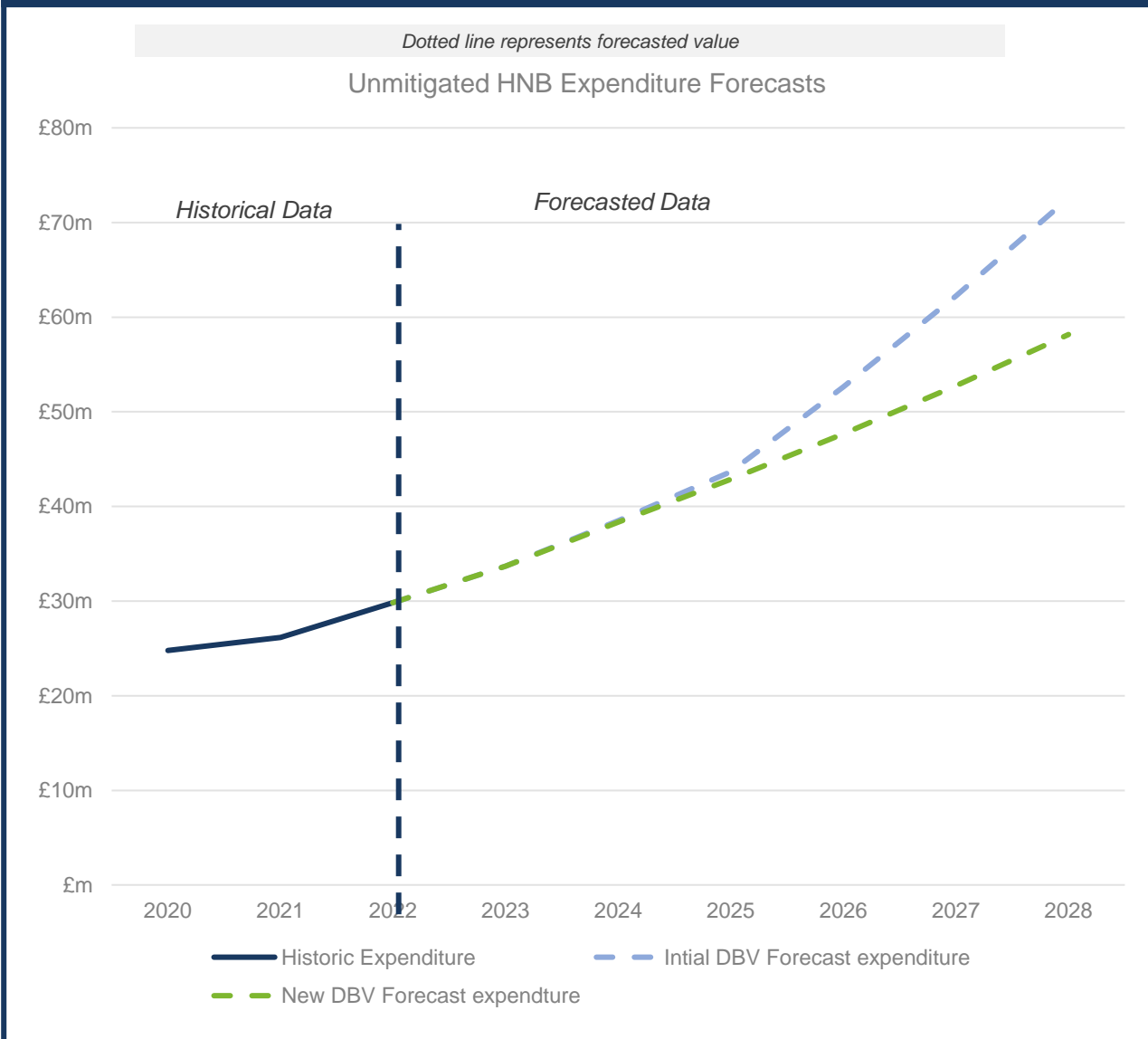
Revised & Inflated Unmitigated Unit Costs (£ per CYP)

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Total Unmitigated Expenditure Forecast: by 2027/28, in-year expenditure is expected to grow to £73m, up from around £30m in 2021/22



Unmitigated Expenditure Forecast



Scenario 1: Actual and Forecast Expenditure by Provision

Provision	2021	2022	2023	2024	2025	2026	2027	2028
Mainstream	£5.0m	£6.0m	£6.4m	£7.4m	£8.1m	£8.9m	£9.7m	£10.4m
RP	£0.9m	£0.9m	£0.9m	£1.1m	£1.2m	£1.2m	£1.3m	£1.3m
MSS	£12.3m	£14.5m	£15.9m	£18.1m	£20.3m	£21.3m	£22.4m	£23.5m
INMSS	£4.6m	£5.1m	£6.6m	£7.8m	£9.6m	£16.4m	£23.8m	£31.8m
Post 16	£1.1m	£1.3m	£1.5m	£1.9m	£2.2m	£2.5m	£2.9m	£3.3m
Hospital / AP	£2.1m	£1.9m	£2.0m	£2.0m	£2.0m	£2.0m	£2.0m	£2.0m
Other	£0.2m	£0.2m	£0.2m	£0.2m	£0.2m	£0.2m	£0.2m	£0.2m
Health, Social Care, Therapies	£0.0m	£0.1m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
Total	£26.2m	£29.8m	£33.7m	£38.5m	£43.7m	£52.6m	£62.2m	£72.6m

*Cells highlighted in blue show actual values

NEW: Scenario 2: Actual and Forecast Expenditure by Provision

Provision	2021	2022	2023	2024	2025	2026	2027	2028
Mainstream	£5.0m	£6.0m	£6.4m	£7.4m	£8.1m	£8.8m	£9.5m	£10.3m
RP	£0.9m	£0.9m	£0.9m	£1.1m	£1.3m	£1.5m	£1.7m	£1.9m
MSS	£12.3m	£14.5m	£15.9m	£18.0m	£20.1m	£22.4m	£24.8m	£27.4m
INMSS	£4.6m	£5.1m	£6.6m	£7.8m	£9.0m	£10.3m	£11.7m	£13.1m
Post 16	£1.1m	£1.3m	£1.5m	£1.9m	£2.2m	£2.5m	£2.9m	£3.3m
Hospital / AP	£2.1m	£1.9m	£2.0m	£2.0m	£2.0m	£2.0m	£2.0m	£2.0m
Other	£0.2m	£0.2m	£0.2m	£0.2m	£0.2m	£0.2m	£0.2m	£0.2m
Health, Social Care, Therapies	£0.0m	£0.1m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m	£0.0m
Total	£26.2m	£29.8m	£33.7m	£38.3m	£42.9m	£47.7m	£52.8m	£58.2m

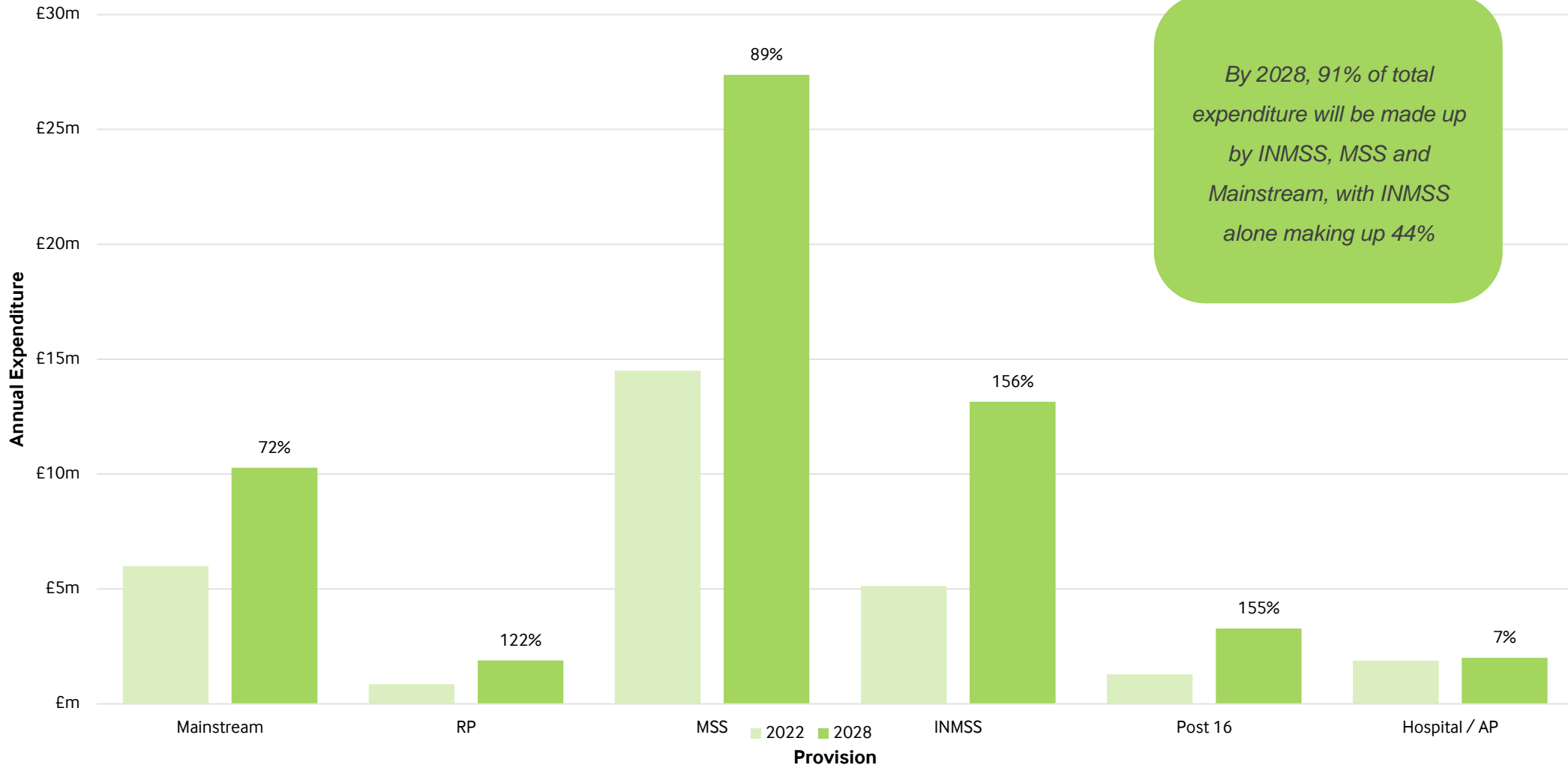
*Cells highlighted in blue show actual values

Tameside have chosen Scenario 2 to take forward into their DSG Management Plan

EHCP Forecast per provision: Expenditure across all the provisions will increase 145% by 2028



Change in Unmitigated Revised Expenditure by Provision

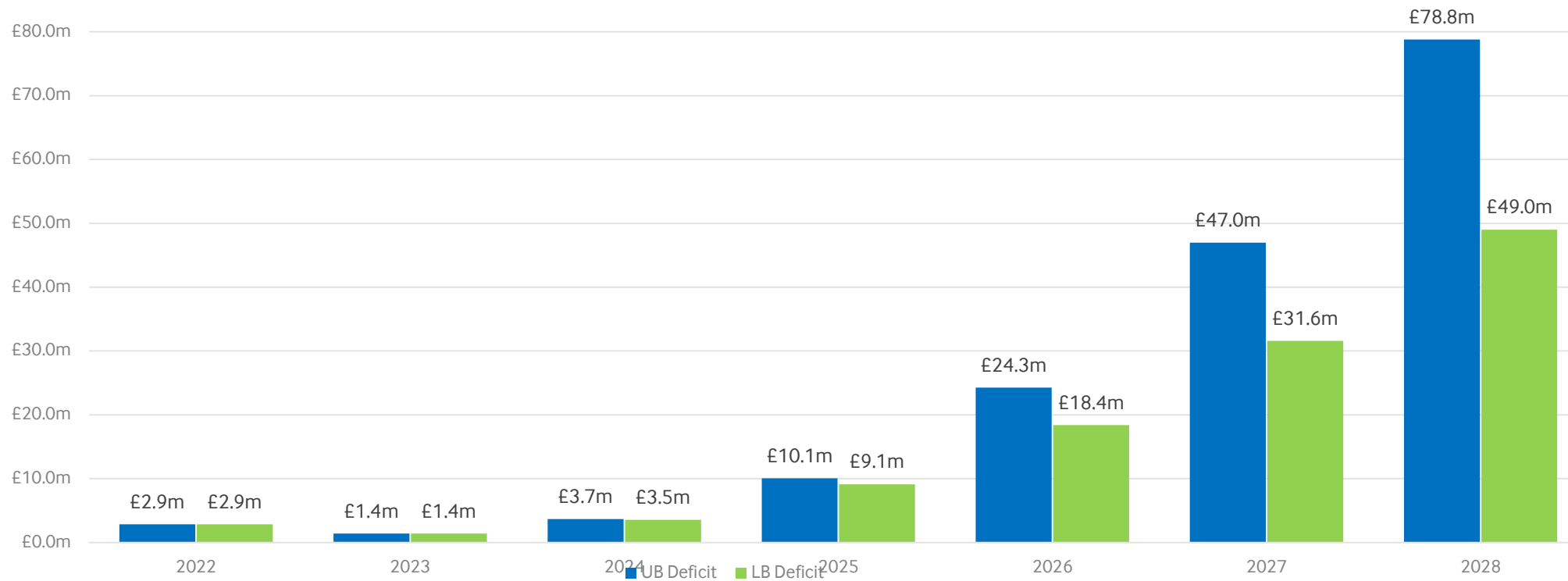


By 2028, 91% of total expenditure will be made up by INMSS, MSS and Mainstream, with INMSS alone making up 44%

Total Unmitigated Cumulative Deficit: Revised cumulative deficit is projected to be £79m by 2028



Tameside Cumulative Deficit Overview

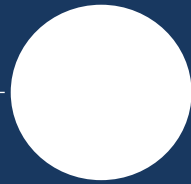


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Assumptions

- DBV Unmitigated Cumulative UB deficit projected to grow to £79m by 2028, LB is £49.0
- Actual budget used for FY ending 2022 (£28.4m) and 2023 (£35.1m)
- Assumed 3% inflation in budget per year for FYs 2024 to 2028

Opportunity

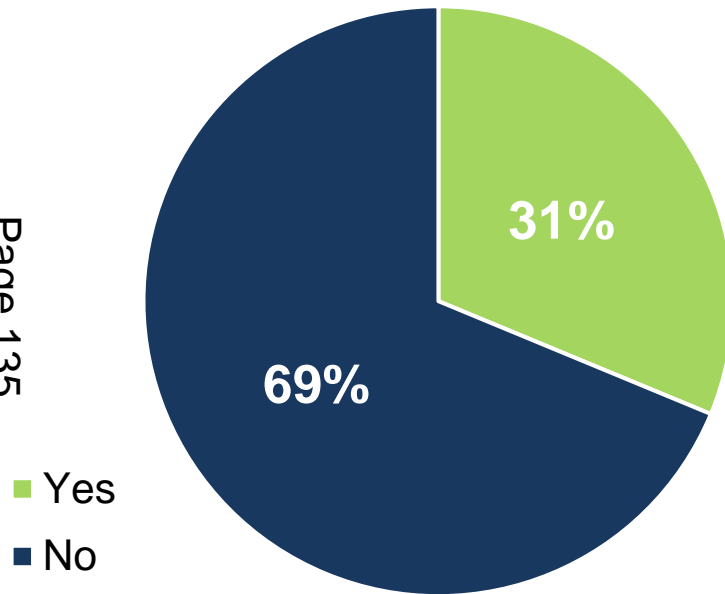


DBV has identified 4 main opportunities within Tameside that would encourage movement of CYPs to more ideal provisions



Did we achieve the ideal outcome for the CYP and enable them to achieve their goals and aspirations?

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Which provisions would be better suited to deliver ideal outcomes?

Provision (e.g. type of school/setting)	Cases	EHCP Necessary (%)	Ideal Placement (%)	Resourced Provisions or SEN Units	Mainstream schools and academies	LA maintained special schools	Not enough information available
LA maintained special schools	14	86%	43%	29%	29%	0%	0%
Independent or non-maintained special schools	9	100%	44%	0%	0%	22%	33%
Mainstream schools and academies	5	40%	100%	0%	0%	0%	0%
Resourced Provisions or SEN Units	2	100%	50%	0%	0%	0%	50%
Early year settings	2	100%	100%	0%	0%	0%	0%

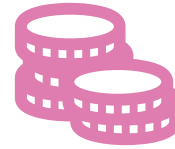
- Supporting the goals and aspirations of the child in **Mainstream without the need of an EHCP**
- Supporting the goals and aspirations of the child in **RP rather than in MSS**
- Supporting the goals and aspirations of the child in **Mainstream rather than in MSS**
- Supporting the goals and aspirations of the child in **MSS rather than in INMSS**

Our biggest opportunity is around the cohort of CYP starting INMSS placements

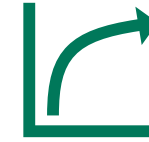
Quantifying the opportunities



In Module 1 we worked to calculate the **unmitigated forecast** i.e. the worst case, do nothing position

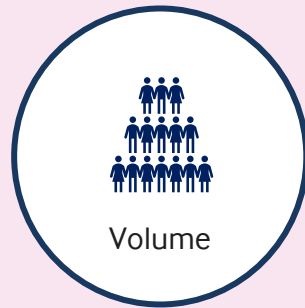


Now we can **quantify the opportunities** we have found to best understand the impact we can have on CYP

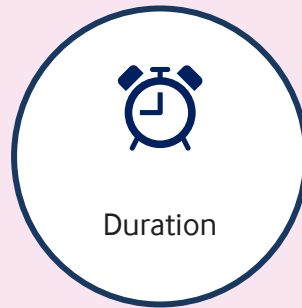


By understanding how these will profile over time we can create the **mitigated forecast**

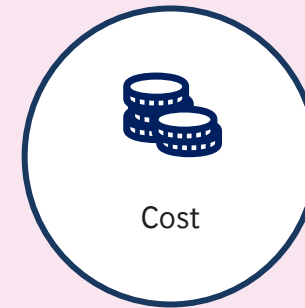
Opportunity Types



Volume



Duration



Cost

Turning Opportunities into Projected Impact: Confidence Weightings



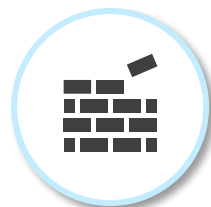
Diagnostic investigations will tell you the potential impact of various different changes. Successful implementation of change depends on a variety of factors. When we forecast impact, we want to make sure that we are realistic with what can be achieved. We do this by applying **confidence weightings** to each opportunity.

What is a “confidence weighting”?

A confidence weighting is expressed as a percentage, with 100% representing total confidence that the change will deliver the full impact identified through the diagnostic. 50% means “we can be confident that we will deliver at least 50% of the impact”. It doesn’t mean “we have a 50% chance of delivering any impact”.

How do you choose a confidence weighting?

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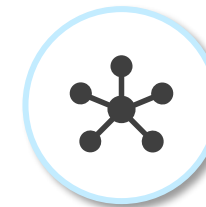
Foundations for Change

Considering how well the Local Area is setup to support complex change. This is where the foundations for change framework can support.



Complexity of the Change

The simplest change would involve changing one word on a form. The most complex would involve changing deeply-held beliefs across thousands of diverse individuals.



Diagnostic Evidence

The more data points which exist to support a given target, and the more they agree with one another, the more confident we can be in the target.

We will support you in applying these principles to choose two confidence weightings for each opportunity. A “target” confidence, which is what we think is a realistic scenario, and a “stretch” confidence, which represents a cautiously optimistic scenario. We will bring our experiences of supporting the implementation of similar changes to ensure we end up with a realistic and achievable set of opportunities.

Benefits Profile / Steady State Difference



In-Year Benefit

Is the financial value realised in a specific year and is dependent on the number of people being impacted in that year by the change

Steady State Value

Steady state value is the eventual, **annual** financial value that will be realised once we are impacting the entire caseload

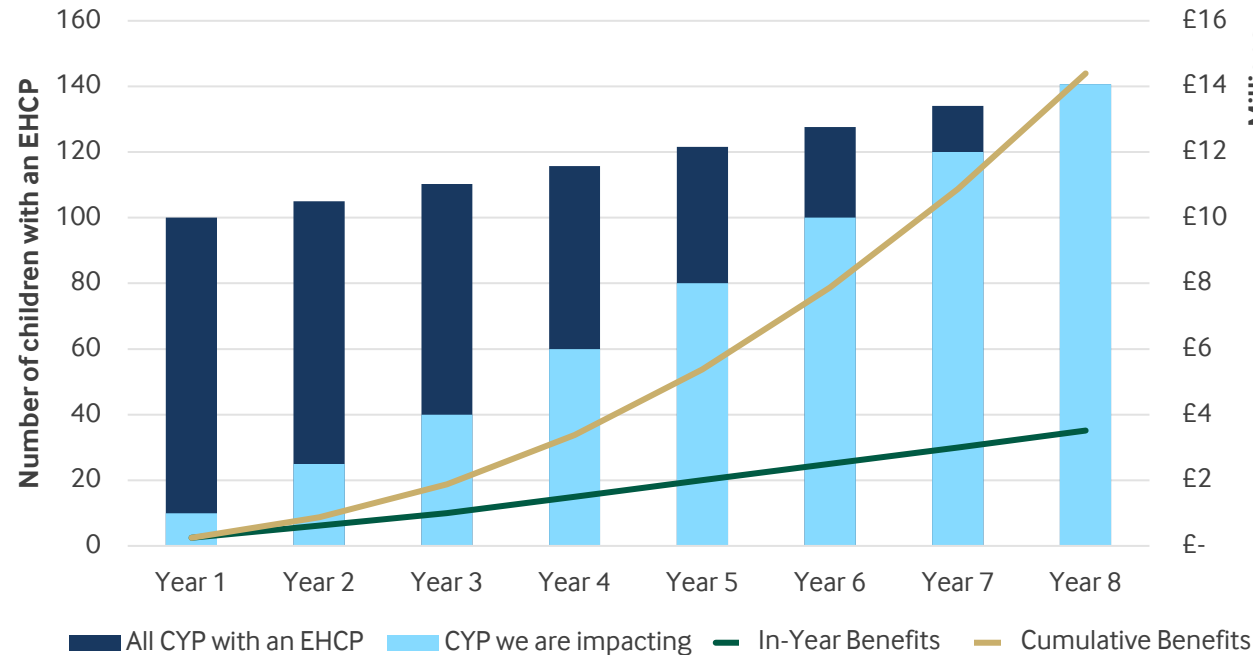
Cumulative Benefit

Is the sum of all in-year benefits. The combined value of all previous years since the changes were implemented.

Example Benefit Profile

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CYP and Financial Impact Methodology



NOT REAL DATA

- 1 In-year Benefit: Green line in any year
- 2 Steady State Value: Green line in year 8 (£3.5m)
- 3 Cumulative Benefit: The sum of all In-Year Benefits (£14m)

Effecting the outcomes for 'new starts' in Tameside would result in a cumulative opportunity value of £5.2m – £7.2m by FYE 2028 in the Lower Bound Scenario



The DBV opportunity is built around affecting the number of new starts into SEND provision. This opportunity is calculated from the number of CYPs that would be effected, the difference in unit cost between provisions, and the average duration CYPs spend in each provision.

'New Starts' Opportunity Matrix

Provision (e.g. type of school/setting)	Cases	EHCP Necessary (%)	Ideal Placement (%)	Resourced Provisions or SEN Units	Mainstream schools and academies	LA maintained special schools	Not enough information available
LA maintained special schools	14	86%	43%	29%	29%	0%	0%
Independent or non-maintained special schools	9	100%	44%	0%	0%	22%	33%
Mainstream schools and academies	5	40%	100%	0%	0%	0%	0%
Resourced Provisions or SEN Units	2	100%	50%	0%	0%	0%	50%
Early year settings	2	100%	100%	0%	0%	0%	0%

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Opportunity		Full Sept '24 Year Opportunity ¹		FY 24/25-27/28 Full Opportunity ²	
ID	Summary	Target	Stretch	Target	Stretch
1	Support without EHCP	£838,936	£1,160,231	£2,515,488	£3,478,867
2	MSS > Mainstream	£165,298	£218,194	£1,099,393	£1,451,199
3	MSS > RP/SEN	£715,169	£1,021,671	£781,398	£1,116,282
4	INMSS > MSS	£795,217	£1,099,768	£846,695	£1,170,962
TOTALS		£2,514,621	£3,499,863	£5,242,975	£7,217,310

Calculations Assumptions box

- All recommended movement from case reviews could be applied to predicted new EHCP starts from school year starting 2024 onwards.
- Forecast of new starts per year have been made from High Impact Analysis and CYP data return 20-22.
- Confidence weightings have been reviewed and incorporate all existing deep dive and benchmarking insights
- 2022 new starts have been used as a baseline and predicted caseload growth % has been applied to estimated future new starts rate.
- No overlap between LA Mitigations and DBV opportunities occurs in analysis
- Linear capacity constraint growth modelled into opportunities
- EHCP growth is fixed against population growth
- 1 – Full Sept '24 Opportunity calculated from total number of new starts affected for that academic year (including ongoing from savings from following years of expected education)
- 2 – FY 24/25 to FY 27/28 Opportunity: Calculated off expected monthly benefit being April '24 to April '28. No benefit expected April '24-Aug '24 due to first impact occurring at the start of academic year Sept '24.

Effecting the outcomes for 'new starts' in Tameside would result in a Annualised opportunity value of £5.2m - £7.2m by 2028.



The DBV opportunity is built around affecting the number of new starts into SEND provision. This opportunity is calculated from the number of CYPs that would be effected, the difference in unit cost between provisions, and the average duration CYPs spend in each provision.

'New Starts' Opportunity Matrix

Supporting children's goals and aspirations through the right provision type



Opportunity	Annualised Benefit		5 year cumulative benefit 22/23 – 27/28	
	LB Confidence Weight	UB Confidence weight	LB Confidence Weight	UB Confidence weight
Supporting the goals and aspirations of the child can be achieved without the need for an EHCP	£0.8 M	£1.2 M	£2.5 M	£3.5 M
Supporting the goals and aspirations of the child in a MSS setting rather than INMSS	£0.2 M	£0.2 M	£1.1 M	£1.5 M
Supporting the goals and aspirations of the child in a Mainstream setting rather than MSS	£0.7 M	£1.0 M	£0.8 M	£1.1 M
Supporting the goals and aspirations of the child through Resources/SEN Unit setting rather than MSS	£0.8 M	£1.1 M	£0.8 M	£1.2 M
Total	£2.5 M	£3.5 M	£5.2 M	£7.2 M

Calculations Assumptions box

- All recommended movement from case reviews could be applied to predicted new EHCP starts from school year starting 2024 onwards.
- Forecast of new starts per year have been made from High Impact Analysis and CYP data return 20-22.
- Confidence weightings do not currently incorporate Module 2 Deep Dive outputs
- 2022 new starts have been used as a baseline and predicted caseload growth % has been applied to estimated future new starts rate.
- Linear capacity constraint growth modelled into opportunities

Opportunity	Annualised Benefit		5 year cumulative benefit 22/23 – 27/28	
	LB	UB	LB	UB

DBV Opportunities will affect Mainstream, RP, MSS and INMSS caseload



HN Pupil Unmitigated Projections per provision								
Provision	2021	2022	2023	2024	2025	2026	2027	2028
Mainstream	674	820	859	966	1055	1144	1232	1320
RP	70	97	100	119	133	148	162	177
MSS	768	855	896	964	1025	1085	1145	1205
INMSS	85	92	112	123	136	149	162	175
Post 16	247	287	319	355	390	424	459	493
Total EHCPs	1844	2151	2286	2526	2738	2950	3160	3370

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Table shows the unmitigated EHCP projections in each provision

Our main savings will be through reduction in CYPs in the INMSS, which has been facilitated by LA mitigations

Opportunity Area	Target Mitigated Number of EHCPs							
	2021	2022	2023	2024	2025	2026	2027	2028
Target Mainstream	674	820	859	966	1030	1071	1106	1134
Target RP	70	97	100	168	189	215	240	266
Target MSS	768	855	896	915	966	1010	1054	1099
Target INMSS	85	92	112	123	134	144	153	162
TOTAL EHCPs	1844	2151	2286	2526	2709	2864	3012	3154

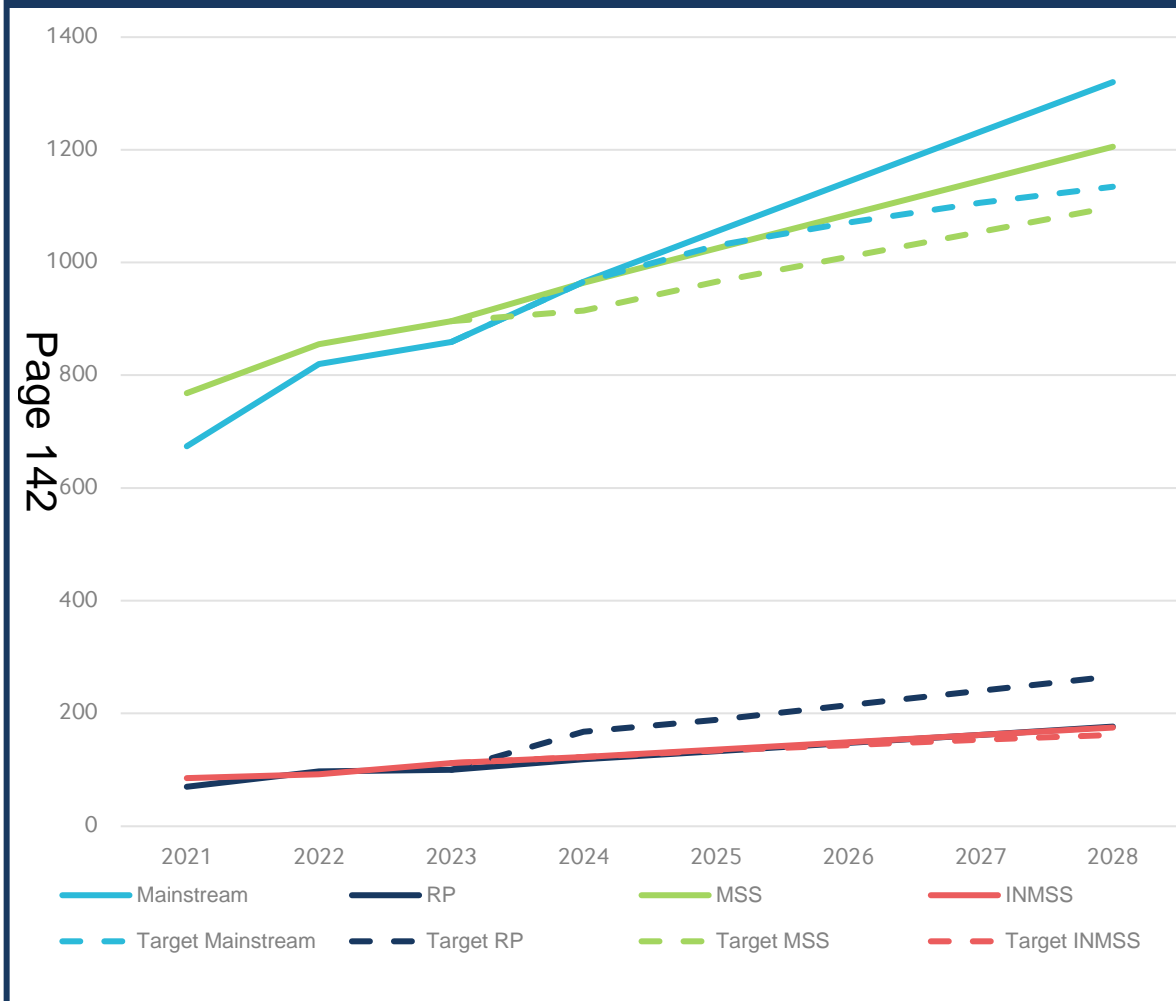
Opportunity Area	Stretch Mitigated Number of EHCPs							
	2021	2022	2023	2024	2025	2026	2027	2028
Stretch Mainstream	674	820	859	966	1021	1044	1058	1065
Stretch RP	70	97	100	168	191	221	251	281
Stretch MSS	768	855	896	915	962	999	1037	1074
Stretch INMSS	85	92	112	123	134	142	150	158
TOTAL EHCPs	1844	2151	2286	2526	2698	2831	2956	3072

Above tables show the target and stretch mitigated projections for number of EHCPs in provisions affected by the opportunities

DBV Opportunities will affect Mainstream, RP, MSS and INMSS caseload



HN Pupil Unmitigated Projections per provision



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Graph shows the unmitigated EHCP projections in each provision

Opportunity Area	Target Mitigated Number of EHCPs							
	2021	2022	2023	2024	2025	2026	2027	2028
Target Mainstream	674	820	859	966	1030	1071	1106	1134
Target RP	70	97	100	168	189	215	240	266
Target MSS	768	855	896	915	966	1010	1054	1099
Target INMSS	85	92	112	123	134	144	153	162
TOTAL EHCPs	1844	2151	2286	2526	2709	2864	3012	3154

Opportunity Area	Stretch Mitigated Number of EHCPs							
	2021	2022	2023	2024	2025	2026	2027	2028
Stretch Mainstream	674	820	859	966	1021	1044	1058	1065
Stretch RP	70	97	100	168	191	221	251	281
Stretch MSS	768	855	896	915	962	999	1037	1074
Stretch INMSS	85	92	112	123	134	142	150	158
TOTAL EHCPs	1844	2151	2286	2526	2698	2831	2956	3072

Above tables show the target and stretch mitigated projections for number of EHCPs in provisions affected by the opportunities

Confidence Weighted Opportunities



New DBV Opportunity		Lower Bound				Upper Bound			
		Total Annualised Benefit (Steady state benefit)		DBV FYE 24 – FYE 28 Cumulative Opportunity		Total Annualised Benefit (Steady state benefit)		DBV FYE 24 – FYE 28 Cumulative Opportunity	
		Target	Stretch	Target	Stretch	Target	Stretch	Target	Stretch
Supporting the goals and aspirations of the child can be achieved without the need for an EHCP	Support without EHCP	£0.8 M	£1.2 M	£2.5m	£3.5m	£0.8M	£1.2M	£2.5m	£3.5m
Supporting the goals and aspirations of the child in a Mainstream setting rather than MSS	MSS > Mainstream	£0.2 M	£0.2 M	£0.8m	£1.1m	£0.2M	£0.2M	£3.6m	£5.1m
Supporting the goals and aspirations of the child through Resources/SEN Unit setting rather than MSS	MSS > RP/SEN	£0.7 M	£1.0 M	£0.8m	£1.0m	£.7M	£1.0M	£0.8m	£1.2m
Supporting the goals and aspirations of the child in a MSS setting rather than INMSS	INMSS > MSS	£0.8 M	£1.1 M	£1.10m	£1.45m	£0.8M	£1.1M	£1.1m	£1.5m
LA Mitigations		£2.6M							
Total Savings		£2.5 M	£3.5 M	£7.8m	£9.6m	£2.5M	£3.5M	£10.6m	£13.8m

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The total value of cumulative benefit will be £7.8m - £9.8m in Lower Bound Scenario

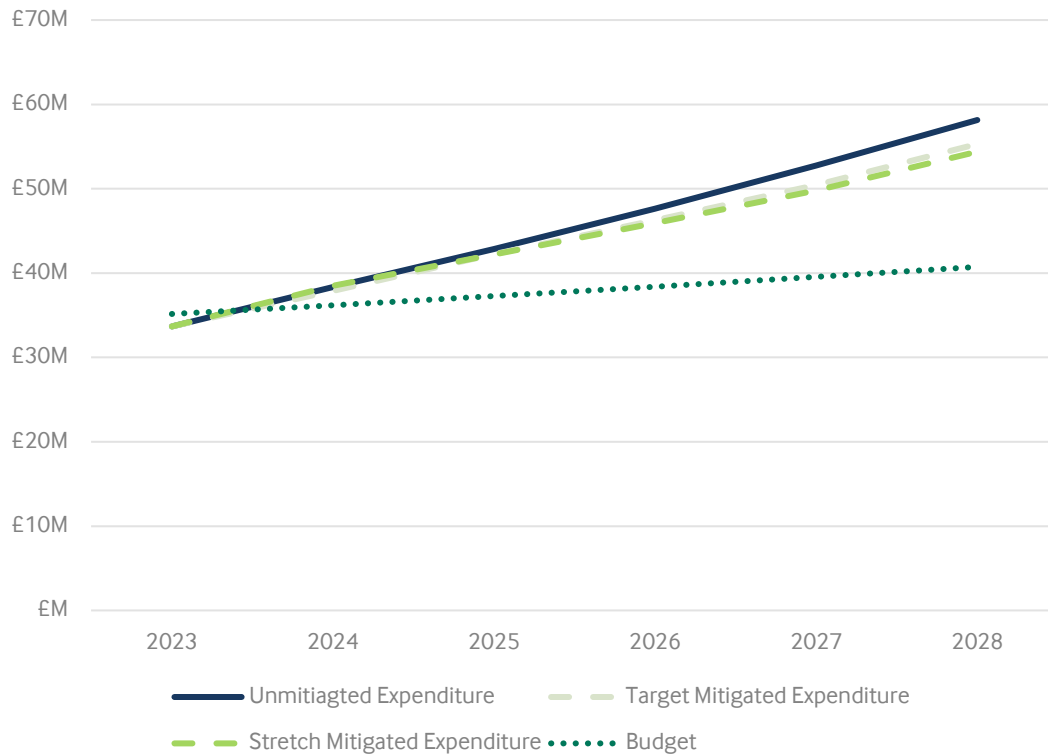


Method and assumptions

- The benefits profile is built with an increasing baseline of forecasted starts and costs year on year using the agreed module 1 output
- Any deficit calculations for future scenarios were built off 3% budget increases year-on-year
- Opportunity modelled on projected number of new pupils and projected unit cost

- Unmitigated INMSS flow goes back into MSS in LA mitigations to add to RP capacity opportunity*
- We have assumed that benefit will only be coming in from Sep 2024 as that is when all opportunities begin to take effect
- Trends built from row level data from 2021-2023 calendar years
- Aggregated view of individual provision projections

Comparison of Stretch and Target Expenditure



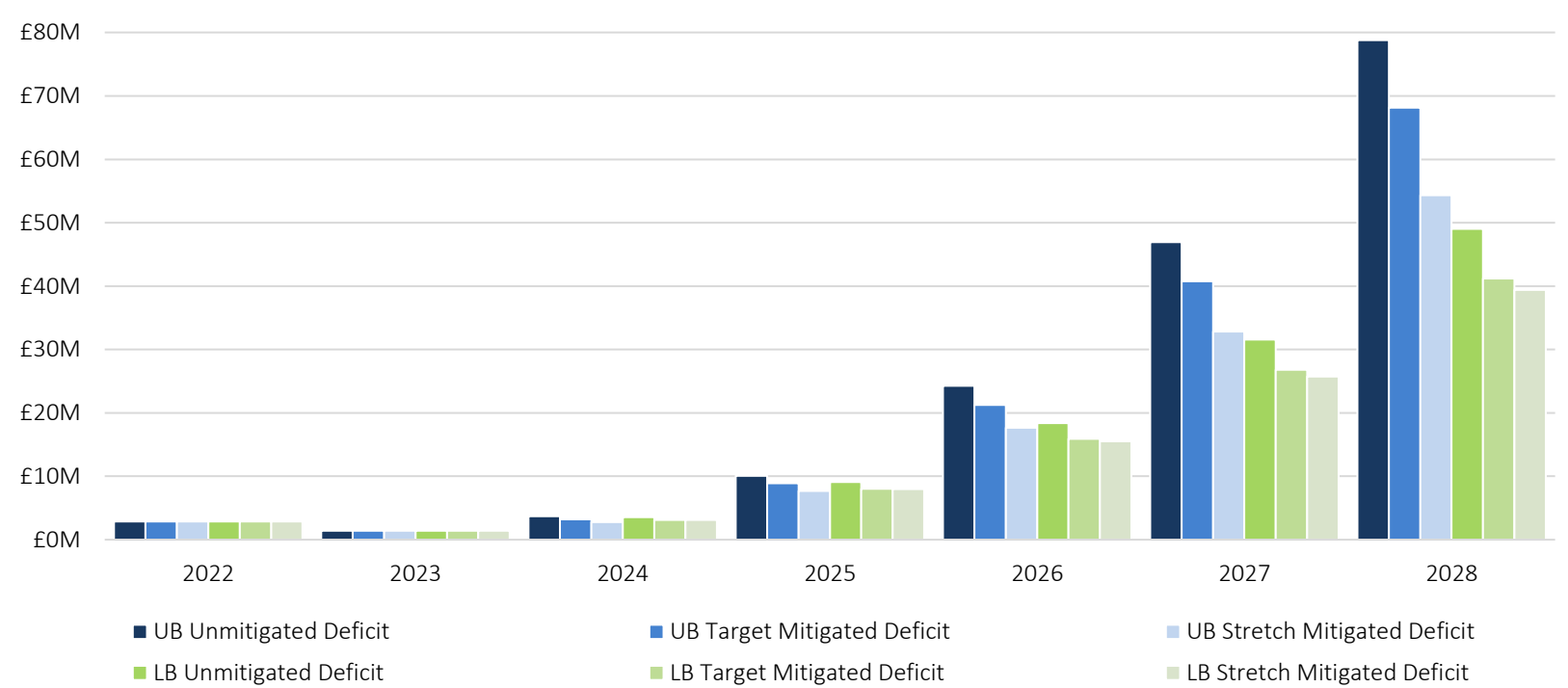
Opportunity		Cumulative Benefit	
		LB Confidence Weight	UB Confidence weight
1	Support without EHCP	£2.5 M	£3.5 M
2	MSS > Mainstream	£0.8M	£1.1 M
3	MSS > RP/SEN	£0.8 M	£1.0 M
4	INMSS > MSS	£1.1 M	£1.5M
Existing mitigations	Increased RP provision	£2.6m	
Total		£7.8 M	£9.6M

Final Mitigated Deficit (including DBV and Existing Mitigations)



Tameside Cumulative Deficit Comparison

LB Cumulative Benefit 23-28 Lower Bound		
New DBV Opportunity	Target	Stretch
Support without EHCP	£2.5 M	£3.5 M
MSS > Mainstream	£0.8M	£1.1 M
MSS > RP/SEN	£0.8 M	£1.0 M
INMSS > MSS	£1.1 M	£1.5M
DBV Total	£5.2m	£7.0m
LA Mitigations	£2.6m	£2.6m
Total Savings	£7.8 M	£9.6M



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Year	2021	2022	2023	2024	2025	2026	2027	2028
UB Fixed Constraint Unmitigated Cumulative Deficit	£1.8m	£2.9m	£1.4m	£3.7m	£10.1m	£24.3m	£47.0m	£78.8m
UB Fixed Constraint Target Deficit	£1.8m	£2.9m	£1.4m	£3.2m	£8.9m	£21.3m	£40.7m	£68.1m
UB Fixed Constraint Stretch Deficit	£1.8m	£2.9m	£1.4m	£2.8m	£7.7m	£17.6m	£32.9m	£54.3m
LB Linear Constraint Unmitigated Cumulative Deficit	£1.8m	£2.9m	£1.4m	£3.5m	£9.1m	£18.4m	£31.6m	£49.0m
LB Linear Constraint Target Deficit	£1.8m	£2.9m	£1.4m	£3.1m	£8.1m	£15.9m	£26.8m	£41.2m
LB Linear Constraint Stretch Deficit	£1.8m	£2.9m	£1.4m	£3.1m	£8.0m	£15.5m	£25.7m	£39.4m

Scenario selected for DSG

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Agenda Item 7

Report to:	EXECUTIVE CABINET
Date:	25 October 2023
Executive Member:	Councillor Jack Naylor, Executive Member for Inclusive Growth, Business & Employment
Reporting Officer:	Julian Jackson, Director of Place
Subject:	UK SHARED PROSPERITY FUND UPDATE
Report Summary:	The report provides an update on the UK Shared Prosperity Fund (UKSPF) for all three investment priorities including Communities & Place, Local Business & People & Skills.
Recommendations:	That Executive Cabinet NOTE the update on UKSPF delivery in Tameside and progress to date.
Corporate Plan:	Key aims of the Corporate Plan are to provide opportunities for people to fulfil their potential through work, skills and enterprise and to ensure modern infrastructure and a sustainable environment that works for all generations and future generations. The interventions that will be supported by the UKSPF programme in Tameside will deliver against these aims in the areas of job creation, modern infrastructure and a sustainable environment
Policy Implications:	The interventions that will be supported by the UKSPF programme in Tameside will support delivery of the Borough's Inclusive Growth Strategy 2021, the Housing Strategy 2021 to 2026, Tameside Climate Change & Environment Strategy, the Council's growth priorities agreed at Council February 2020 and the draft Greater Manchester Places for Everyone joint development strategy.
Financial Implications: (Authorised by the statutory Section 151 Officer & Chief Finance Officer)	Tameside Council have been awarded £3.812m UKSPF grant funding from Department for Levelling Up, Housing and Communities (DLUHC) via GMCA. This funding covers the period 22/23 – 24/25 as outlined in the table below:

UKSPF Investment Priority	Funding Allocation			
	22/23 £m	23/24 £m	24/25 £m	Total £m
Communities and Place	0.010	1.265	0.704	1.979
Local Business (Small and Medium-Sized Enterprise, SME Workspace)	0.000	0.262	0.953	1.215
People and Skills	0.000	0.226	0.392	0.618
Total	0.010	1.753	2.049	3.812

The total for People and Skills has been notionally split equally across 2023/24 and 2024/25 but will be subject to change as delivery plans are confirmed, and will form part of future updates.

This funding combines both revenue and capital elements:

UKSPF Investment Priority	Revenue £m	Capital £m	Total £m
Communities and Place	0.899	1.080	1.979
Local Business (Small and Medium-Sized Enterprise, SME Workspace)	0.422	0.793	1.215
People and Skills	0.618	0.000	0.618
Total	1.939	1.873	3.812

Update on the progress being made is set out in the report with the forecasted financial position in 23/24 shown in the table below.

UKSPF Investment Priority	23/24 Financial Position		
	Budget £m	Expenditure as at P5 £m	Total Forecast £m
Revenue Expenditure			
Communities and Place	0.574	0.042	0.574
Local Business (Small and Medium-Sized Enterprise, SME Workspace)	0.252	0.013	0.252
People and Skills	0.226	0.000	0.226
Total - Revenue	1.052	0.055	1.052
Capital Expenditure			
Communities and Place	0.691	0.007	0.691
Local Business (Small and Medium-Sized Enterprise, SME Workspace)	0.010	0.000	0.010
Total - Capital	0.701	0.007	0.701
Total Expenditure	1.753	0.062	1.753

Expenditure appears low compared to the total forecast however the majority of the work to date has been on project initiation, following approval of projects in June 2023. Project delivery and costs are therefore expected later in 23/24. For example, greenspace work is primarily expected to be delivered during Winter, the Fridays on the Square events have only just begun, and the Lantern Parade will occur during December.

There will be no adverse impact on the general fund because of this grant; all posts funded through UKSPF are on a fixed term basis. It is also expected that alongside the wider benefits, there will be contributions to existing management costs which will be one off mitigations for some of the pressures across the Place directorate in 23/24. These will be monitored and reported as part of the normal revenue monitoring process.

**Legal Implications:
(Authorised by the
Borough Solicitor)**

There are no immediate legal implications arising from this report which is primarily to update Members on the progress being made in relation to the programme.

Project officers will continue to ensure that the funding is spent within the remit of the grant to ensure that the clawback provisions are not triggered.

Risk Management:

Potential for loss of external funding opportunity to support future growth and diversification of the Tameside Economy, improved infrastructure and the securing of investment in the Borough and act as a catalyst for further investment and regeneration.

Access to Information:

Not confidential

Background Information:

The background papers relating to this report can be inspected by contacting the report writer, Christopher Ward, UKSPF Project Manager, Investment, Development and Housing



Telephone: 0161 342 2661



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1. INTRODUCTION

- 1.1 The UK Shared Prosperity Fund (UKSPF) is a £2.6bn fund designed to succeed and improve upon EU structural funds.
- 1.2 The UKSPF funding is split into three investment priorities; Communities & Place, Local Business and People & Skills with one overarching objective to build pride in place and increasing life chances.
- 1.3 Devolved authorities were responsible for submitting implementation plans, working to set Government timescales. An overarching implementation plan was submitted by the Greater Manchester Combined Authority (GMCA) to Central Government in July 2022, followed by an Investment Plan in September 2022.
- 1.4 Approval of the Investment Plan was received by GMCA from Central Government on 5 December 2022. Following this approval GMCA were able to provide the relevant grant agreements to Greater Manchester (GM) Local Authorities (LA's), including Tameside.

2. UKSPF COMMUNITIES & PLACE

- 2.1 The council has been allocated £1.979m of funding for Tameside against the UK Shared Prosperity Fund (UKSPF) Communities and Place investment priorities. The submission was designed to be an economic driver that delivers genuine levelling up opportunities across Tameside supporting national, GM and Tameside strategic policies.
- 2.2 This funding is available under the following interventions:
 - E1 Funding for improvements to town centres and high streets, including better accessibility for disabled people, including capital spend and running costs (capital and revenue)
 - E3 Creation of and improvements to local green spaces, community gardens, watercourses and embankments, along with incorporating natural features into wider public spaces
 - E6 Support for local arts, cultural, heritage and creative activities
- 2.3 On 25 January 2023 Executive Cabinet gave approval to implement the programme of works for UKSPF Communities and Place, to formally accept the funding and to enter into the Grant Funding Agreement. The approval for entering into the Grant Funding Agreement for the receipt of UKSPF funding was delegated to the Director of Place.
- 2.4 Any substantial, contractual changes or operational changes would need to be reported in line with the Greater Manchester Combined Authority's (GMCA's) change management process. This would require a change management form to be completed after a discussion with the programme manager at GMCA. The changes will then be discussed at the GMCA operations board and decisions made will be formally fed back.
- 2.5 Projects linked to Hyde Town Centre have allowed for additionality which will provide additional outputs and outcomes to those initially forecast, positively impacting the local community and key stakeholders on the Hyde masterplan. A shop frontage improvement scheme will be introduced to respond to a number of comments and concerns relating to the poor quality town centre shop frontages, primarily on Market Street. In addition, and similar to the community grant scheme in Ashton town centre as part of the Ashton Cultural District, local community groups in Hyde will be able to apply for funding to deliver cultural activity in Hyde. These variations have been agreed via the process set out in the Executive Cabinet report of 25 January 2023 and will be reported on in future update reports.

- 2.6 Progress to date on the current projects funded through the UKSPF can be found in Table 1 in Appendix A. There are 16 projects which are all considered to have low risk of non-delivery.
- 2.7 Table 2 in Appendix A shows active projects within this investment priority including budget allocation and spend to the end of August in this financial year.

3. UKSPF SUPPORTING LOCAL BUSINESS

- 3.1 It has been confirmed that the UK Shared Prosperity Fund (UKSPF) Local Business (Small and medium-sized enterprise, SME Workspace) investment submission has been successful and the associated funding of £1,215m will now be awarded to the Council subject to the Grant Funding Agreement with GMCA.
- 3.2 This Funding is available under the following interventions:
- E22: Investing in enterprise infrastructure and employment/innovation site development projects. This can help to unlock site development projects which will support growth in places.
- 3.3 On 8 February 2023 Executive Cabinet gave approval to implement the programme of works for UKSPF Local Business (Small and medium-sized enterprise, SME Workspace), to formally accept the funding and to enter into the Grant Funding Agreement. The approval for entering into the Grant Funding Agreement for the receipt of this UKSPF funding was delegated to the Director of Place.
- 3.4 Progress to date on the current projects within this investment priority can be found in Table 3 in Appendix B. Overall, there are 2 projects, all considered to have low risk of non-delivery.
- 3.5 Table 4 in Appendix B shows proposed spend for the supporting local business investment priority and actual spend to date.

4. UKSPF PEOPLE AND SKILLS

- 4.1 A grant of £0.490m has been offered to Tameside Local Authority with additional funding of £0.128m to resource an additional role that will oversee the UKSPF People & Skills investment priority. This funding is set to enable local authorities to support NEET (15 to 18 year olds, Not in Education, Employment, or Training) Delivery.
- 4.2 This funding is available under the following interventions:
- E33 Employment support for economically inactive people: Intensive and wrap-around one-to-one support to move people closer towards mainstream provision and employment, supplemented by additional and/or specialist life and basic skills (digital, English, maths* and ESOL) support where there are local provision gaps.
 - E34 Courses including basic skills (digital, English, maths (via Multiply) and ESOL), and life skills and career skills** provision for people who are unable to access training through the adult education budget or wrap around support detailed above. Supplemented by financial support for learners to enrol onto courses and complete qualifications.
- 4.3 The grant will be provided to deliver a hyper place based programme of activities that will support priority groups through key transition groups to:
- Decrease levels of young people identified as at risk of NEET (15 to 18 year olds, Not in Education, Employment, or Training) transitioning into NEET,
 - Reduce NEET levels for priority groups,

- Reduce the disparity in NEET levels for priority groups against whole age cohort,
- Reduce levels of young people whose situation is not known and increase participation levels of priority groups.

4.4 On the 30 August 2023 Executive Cabinet gave approval to accept this funding to deliver a cross Directorate project that will achieve the outcomes set out by GMCA.

4.5 The grant funding agreement for this element of UKSPF funding has been received and is in the process of being sealed.

5. PERFORMANCE AND REPORTING

5.1 As part of the Grant Funding Agreement, the Council is required to submit a formal reporting template every quarter to support Greater Manchester Combined Authority (GMCA) reporting requirements to DLUHC.

5.2 From September 2023, GMCA will require a full contract to date reconciliation and review to be undertaken which confirms:

- Actual expenditure to date signed off by s151 officers;
- Alongside achievement / forecast of identified Outputs/Outcomes, Way of Working Targets and;
- If required, credible plans demonstrating revised delivery to achieve expected targets, setting out how any underspends if applicable will be utilised in the next 6-month period.

5.3 In the development of the GM Investment Plan, it was agreed that a number of cross-cutting themes would underpin the delivery of UKSPF in GM to demonstrate the added value of place-based programmes in the realisation of the Greater Manchester Strategy. These are;

- Environment; Contribution to GM's 2038 net zero ambitions.
- Equalities; Contribution to reducing inequalities.
- Social Value; Embedding social value.

5.4 Local Authorities were asked to set out their approach to delivering "ways of working" to these cross-cutting themes through the UKSPF interventions and were considered in the original proposals.

5.5 Greater Manchester Combined Authority (GMCA) may reduce the funding allocation, overall or for a specific year if there is a failure to comply with the UKSPF performance monitoring requirements and / or if progress on project delivery is unsatisfactory.

6. CONCLUSION

6.1 The interventions supported by the UKSPF programme for Tameside will support delivery of the Council's strategic priorities as set out in the Tameside Corporate Plan and Tameside Inclusive Growth Strategy.

6.2 The funding secured provides a significant financial contribution to the Council and provides a proactive approach to the delivery of future inclusive growth.

7. RECOMMENDATIONS

7.1 As set out at the front of this report.

	A	B	C	D	E	F	G	H
6	Cultural Sector support & development	This will enable the cultural sector of Tameside to deliver events and projects in borough but crucially also enable them to be better placed to bid for much needed external investment. This will mean more content for events and activities in Town Centres and across our venues.	This will fund the current Cultural framework development (funded by ACE and the Council) to a Cultural Strategy stage. Curated Place was appointed to deliver the framework and are now commissioned to continue the work of turning the framework into a strategy. This will also fund the setup of a cultural compact to support the delivery of the strategy. The cultural framework is now moving from a framework to a strategy. Additionally, grants are being created for artists and the creative sector in Tameside to bid for, these grants can act as catalysts for further external investment for the organisations but also as delivery money for activities and events within the borough. The fund will also support external bid writers to develop grant applications for the sector. It has been identified through interviews and consultation with funders and local arts organisations and creatives that a lack of bid writing skills and capacity is hindering the sector successfully bidding for funds to deliver activity and organisational development. This will enable the borough to increase external cultural investment into Tameside benefitting both the cultural sector and residents alike.	Low		0.105	0.052	0.157
7	Footfall data for town centres	Footfall data enables us to carry out analysis and assess health checks and visitor numbers for our town centres.	This project is in the early stages of procurement and will be used by TMBC in our continued town centre monitoring efforts. We have met with suppliers that use mobile phone data to record the footfall in the required areas and assess service offers. A specification is due to be agreed and sent out to prospective suppliers for quotations.	Low		0.037	0	0.037
8	Hyde Outdoor Market	This work would create a more viable and attractive offer for both local market traders and the local community as well as open up the possibilities of the shopping centre.	The UKSPF funded Tameside Market Study project that is currently in progress will feed into the proposal for Hyde Outdoor Market. The Market Study is due to be completed Mid-August, further updates will be available after the study has taken place.	Low		0.075	0	0.075
9	Hyde Town Centre Engagement Unit	A Hyde Town Centre masterplan has been commissioned. As part of the work in preparing the masterplan, UKSPF would enable the refurbishment of a vacant unit in the town centre that by the local community for gatherings and for consultation events to support the preparation of the Hyde Town Centre Masterplan which sits within the Hyde Triangle Growth Location.	Opportunities to identify suitable space within the town centre is currently being explored for the project to meet the expected outcome. This space will be for the local community to meet and for social enterprise to flourish.	Low		0.025	0	0.025
10	Improvements to Parks, Play Areas & Countryside Sites and Town Centre cleanliness (Litter hubs)	This funding will be used to deliver capital projects in three themes. Increasing access to parks and countryside will be achieved through infrastructure improvements such as repairs to paths. We will enhance existing play provision by providing more play equipment suitable for young people with disabilities. We will support the local community by providing funding towards litter hubs.	Projects priority list has been approved by the Director of Place and Executive Members, we can move forward with the project plan which includes improved accessibility to play facilities at parks and play areas across Tameside. Plans for accessible play are being developed in conjunction with consultation with local families. Capital work is set to begin November 2023.	Low	0.008	0.226	0.116	0.35

	A	B	C	D	E	F	G	H
11	Social Value	The proposal submitted to GMCA stated that funding will be used to recruit a Social Value Officer for the 2.5 year period. The role will focus on maximising social value across all work but with priority given to UKSPF. This will increase outputs around employment for residents, skills improvements and sponsorship to be used as additional funding for projects within Tameside. The role will build on the work in its infancy which has achieved results including sponsorship of Jobs Fair and digital skills events.	Social value work is currently being undertaken internally, providing a base for this project to build on. Working with STAR who gather information from the social value portal to share with contracting managers examples of where Social Value has been delivered at a high standard. This work is on going throughout the funding period to the end of March 2025.	Low		0.075	0.05	0.125
12	St Petersfield Fountains	To repair mechanisms and bring the fountains back into use, which would provide a significant feature to the public realm and are in line with the ambitions of the St Petersfield masterplan.	Fountains & Features Ltd have been appointed to provide work and parts to enable the functioning of the fountains feature in St Petersfield opposite Ashton Old Baths. It will also fund a 12-month maintenance package to run concurrently with the repair works. This company have undertaken a feasibility report on the fountain mechanism. Fountain & Features also maintain the Council's other fountains and water features across the borough. This work has now been completed.	Low		0.04	0	0.04
13	Stalybridge Civic Hall	The Civic Hall is at the forefront of the High Street Heritage Action zone scheme this work will secure its long-term future, including work to the roof and other internal works. This will ensure the Civic Hall is retained at the heart of the cultural quarter and the town centre as an asset to the people of the town and the Borough.	The Civic Hall scheme started on site in August 2023 and is due for completion in May 2024. In addition to UKSPF this project is being funded via the High Street Heritage Action Zone, UK Capital Regeneration Funding, and the Council's Capital Programme. Progress on delivery is being reported quarterly to Strategic Planning and Capital Monitoring Panel.	Low		0.18	0.14	0.32
14	Stalybridge Old Town Hall site	Additional work to enable the site to meet its potential as an attractive and inviting space, to complement the public realm works along Market Street.	Initial survey work is being progressed and the site will form part of the wider public realm works for the Town Centre to be delivered utilising the UK Capital Regeneration Funding secured for Stalybridge.	Low		0.02	0	0.02
15	Stalybridge West Delivery Strategy	To deliver this next stage in the work programme to produce a development prospectus, next stage planning and delivery strategies and undertake a Soft Market Test around the development opportunity in Stalybridge around the emerging Masterplan from the Evergreen work.	The first phase of this project to prepare a development prospectus for Stalybridge West and undertake a soft market testing has been completed. Further work will be progressed later in 2023 in relation to the potential to procure a development partner and implement enabling infrastructure works utilising the UK Capital Regeneration Funding secured for Stalybridge.	Low		0.035	0	0.035

	A	B	C	D	E	F	G	H
16	Street Fest	This family friendly community event is for those with a penchant for good food, good drink, good music and good friends situated in Stalybridge. Six events that bring the very best street food and local musicians to make Stalybridge Street Fest spectacular and something that everyone can enjoy. Positioned in the picturesque Armentieres Square with the canal running through the centre and adjacent to the Victoria Market Hall.	The May & June events have taken place the remaining events are due to take place on the 2nd Friday of each month until September 2023. Unfortunately, our July event was cancelled due to adverse weather conditions. Alexandra Rucki, Communications Manager at the GMCA requested images from the events for Street Fest to be used as a positive UKSPF story in the UKSPF Local Partnership Board meeting held on the 19th of June 2023.	Low		0.033	0	0.033
17	Tameside Markets Study	The study will review the current position of Tameside markets (Hyde and Ashton) with a primary to make recommendations for a proposed future market offer across the Borough	A company called Market Curator have been awarded the contract. The study is estimated time scale for completion is 8 weeks. Inception meeting took place on the 29/06/2023, regular review meetings are now in place to receive updates on progress. This study will support three additional UKSPF capital projects, Hyde Outdoor Market, Ashton Market Hall and Hyde Town Centre Engagement Unit which focuses on making recommendations for a proposed future in both areas, further updates on these projects will be provided when this study has been completed.	Low		0.03	0	0.03
18				Total	0.01	1.265	0.704	1.979
19			*22/23 funding has been fully spent in line with the budget allocation shown in Table 1					

Project Name	Project Summary	Update	Risk
<p align="center">Business Support Officer</p>	<p>Business Support Officer to work across Tameside and encourage new business birth, working to raise Tameside's position currently at the lowest business birth rate in GM. This role will also support the new SME workspace available and highlight the opportunity to growing SME's (Small and medium-sized enterprise's).</p>	<p>Supported in organising latest Tameside Means Business Networking Event, which saw over 50 businesses attend. Frequently liaises with enterprises at Ashton Old Baths and entrepreneurs who attend the Tameside Talks Business monthly drop-in. Work collaboratively with Business Community Champions to provide businesses with crucial free support. Orchestrated a cake business taking on one of the council's cared for and looked after young people through Youth Employment Support scheme. Brought some of the borough's biggest employers into the Tameside Means Business network following meetings. Up to the end of June 2023 our Business Support Officer has engaged and supported 74 businesses in the area. This role is fixed to the end of the funding period, March 2025.</p>	<p align="center">Low</p>
<p align="center">Ashton Old Baths / SME (Small and medium-sized enterprise) workspace</p>	<p>Ashton Old Baths is an established and successful conversion of a Grade II* Listed Building to an architectural award-winning incubation hub for media, technology and design along with a new Data Centre to ensure the very best in digital connectivity. This project will include the creation of undeveloped space in Ashton Old Baths that will result in new office floorspace - approximately 240m². The result of the work to Ashton Old Baths will mean space for new SMEs (Small and medium-sized enterprise's) in the building, bringing new jobs and a sustainable future for this state of the art building.</p>	<p>A cost plan of work is currently being revised to obtain up to date costings for the work that has been agreed. Once the revised cost plan has been completed a priority plan of work is to be created for capital work to begin. Creation of new SME (Small and medium-sized enterprise) workspace from undeveloped space within AOB is linked to the capital work above and will provide support for growing and new businesses which is currently limited across all of Tameside. SME worksace improvements have arleady began & survey's needed for the capital work at AOB to take place start to take place in the coming months.</p>	<p align="center">Low</p>

Project	23/24			24/25		Total	
	Budget Allocation £m	Spend to 31 Aug 23 £m	Total Forecast £m	Budget Allocation £m	Forecast Spend £m	Budget Allocation £m	Forecast Spend £m
Ashton Old Baths / SME workspace	0.224	0	0.224	0.91	0.91	1.134	1.134
Business Support Officer	0.038	0.013	0.038	0.043	0.043	0.081	0.081
Total	0.262	0.013	0.262	0.953	0.953	1.215	1.215

Agenda Item 8

Report to: EXECUTIVE CABINET

Date: 25 October 2023

Executive Member: Councillor Jan Jackson, Executive Member (Planning, Transport and Connectivity)
Councillor Denise Ward, Executive Member (Climate Emergency and Environmental Services)

Reporting Officer: Julian Jackson, Director of Place

Subject: BIODIVERSITY NET GAIN

Report Summary: The report outlines the new mandatory net gain requirement for biodiversity introduced by the Environment Act 2021 becoming a requirement that applies from January 2024 for developments in the Town and Country Planning Act 1990, unless they are exempt, and to small sites from April 2024 applying for planning permission. It further outlines a range of activities which have been undertaken in readiness for the new requirement and details the opportunities which exist to the council as a landowner.

Recommendations: Executive Cabinet are recommended to:

1. Note the impending requirement for biodiversity net gain for most new development and the consequential demand this will create for biodiversity offsetting;
2. Note the process required to bring Tameside owned sites forward to be ready to provide potential biodiversity offset locations as set out within Section 3 of this report;
3. Note the outcomes of the supply and demand work as set out in **Appendix 1**;
4. Endorse the approach of assessing our own land with the principal that this be used as a potential offset site, subject to further member reporting.

Corporate Plan: Biodiversity Net Gain assists the corporate plan priorities around infrastructure and environment, in particular by ensuring a sustainable environment that works for all and future generations.

Policy Implications: Net gain requirements for biodiversity have been introduced by the Environment Act 2021, becoming a requirement that applies from January 2024 for developments in the Town and Country Planning Act 1990, unless they are exempt, and to small sites from April 2024 applying for planning permission. This report does not seek to introduce new policy in-itself but seeks to maximise the potential opportunities which present themselves through the new legislation whilst minimising a number of risks.

Financial Implications: (Authorised by the statutory Section 151 Officer & Chief Finance Officer) The Council have been allocated revenue grant funding from Defra to support Biodiversity Net Gain readiness works in both 22/23 and 23/24. The table overleaf shows the remaining balance available from 22/23 and the allocation for 23/24.

Year	£
22/23 carried forward	£15,807

23/24	£26,807
Total	£42,614

One of the ways in which the Council can ready itself for the biodiversity net gain requirements is by carrying out full assessments on the pieces of Council owned land identified in **Appendix 2**. It is expected that the cost of these assessments, of approximately £31,000, will be fully funded through the allocated grant. As the available grant is greater than the costs of the assessments, there is not an expectation this will cause pressure to the General Fund revenue position. Cost overruns will have to be constrained within existing resources in Place.

Once the assessments are completed, the Council may be able to market and sell offsetting credits to developers. This will be subject to further Member reporting to consider the outcomes of the assessments and suitability of the identified sites for achieving net gain for biodiversity. Subsequently, further work will also be needed to determine an appropriate charge that could be levied for a unit, considering all potential costs and market pricing. The outcome of this costing exercise will also be subject to further Member approval, which will be sought at the same time as seeking authority to put the Council's land into the marketplace.

There is the potential that in developing and maintaining offsetting sites as a chargeable service, the Council could reduce some existing costs associated with managing these sites resulting in a favourable impact on revenue budgets, or reduced pressure on existing capacity, within the Place directorate. This will need to be monitored with any ongoing reduction in cost factored into the Medium Term Financial Strategy.

It is expected the new national requirement will not place significant pressures on capacity within the Planning Department and instead, most resourcing pressures will fall upon the Greater Manchester Ecology Unit (GMEU) as the Council's ecological advisors. The Council pay an annual contribution to the GMEU of £16,586 which supports the review of statutory ecological assessments currently carried out as part of considering planning applications. This contribution is made as part of the Council's payment to GMCA and the budget sits within the Governance Directorate. As a result of the increased resource pressures on GMEU, an additional contribution has been requested through GMCA equating to £3,500 from each Local Authority. Subject to this being approved at both a local and Greater Manchester level, this can be funded from the Biodiversity Net Gain funding already received as a one off in year. Any recurrent variation to the agreement between the Council and GMEU must be managed within existing budgets.

Whilst the budget for the GMCA contribution sits within Governance, it should be noted that the revenue budget for Planning is supported by income generated through fees and charges. As planning fees are set nationally, the Council do not have the authority to increase fees to recover any additional costs and it is not yet known if there will be any national increase to reflect the new requirements linked to biodiversity net gain which could support this request on a recurrent basis.

Legal Implications:

The legal implications are contained in the main body of the report

**(Authorised by the
Borough Solicitor)**

Risk Management:

The report seeks to manage risk to the council across a number of areas. Most notably that if there is not consideration of making use of council land to receive off-site investment in ecological mitigation from development, there is the potential that this investment leaves Tameside which has both financial and reputational risks but also ecological too. Further to which there are risks that if off-site opportunities are not readily available the development pipeline becomes stifled as off-site opportunities become more challenging to come by and as a consequence so does achieving planning permission. In addition, there are risks with taking forward council owned land for potential biodiversity offsetting, including financial, reputation and liability and further work will need to be undertaken to fully understand and manage these risks.


Access to Information:

Appendix 1 sites considered as part of desk-based assessment.

Appendix 2 potential opportunity sites.

Background Information:

The background papers relating to this report can be inspected by contacting Graham Holland, Planning Policy Manager or Nicola Marshall, Greenspace Development Manager

 Telephone: 07970456260 / 07814541623

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 e-mail: nicola.marshall@tameside.gov.uk

1. INTRODUCTION

- 1.1 The Environment Act 2021 legislates for mandatory net gain for biodiversity as a requirement of most new development consented by a local planning authority. Biodiversity net gain is a significant part of the government's objective to improve the environment for future generations as endorsed by the 25 Year Environment Plan¹ as it is a way to contribute to the recovery of nature whilst developing land.
- 1.2 The net gain requirement was to apply from November 2023, however this has moved back to January 2024 through recent government announcement², for developments in the Town and Country Planning Act 1990, unless they are exempt, and to small sites from April 2024. The requirement to achieve a measurable uplift in biodiversity of at least 10% compared to the baseline of a site before development has implications for a range of parties, most notably local planning authorities and developers, but also land managers.
- 1.3 The Council as a local planning authority will have to approve a biodiversity net gain plan where this forms a requirement of an application for planning permission to ensure that a net gain will be achieved. In doing so it will consult with the Greater Manchester Ecology Unit who service Tameside, amongst the other Greater Manchester boroughs, with specialist ecological advice.
- 1.4 In readiness for the new requirement being introduced across England, several council officers have and continue to be involved in a range of work streams with the GMCA, GM Ecology Unit, peers across the other GM districts and a range of statutory and advisory bodies including Natural England and the Planning Advisory Service to ensure a smooth introduction to the new requirements.
- 1.5 Further to the above, government grant funding of close to £60,000 has been successfully accessed for the financial years 2022/23 and 2023/24 to assist in delivering a range of associated activities and training, some of which form the basis of this report, to ensure Tameside is ready for the introduction of the net gain requirement.

2. BIODIVERSITY OFFSETTING

- 2.1 As a developer the new requirement continues to advocate that the loss of habitats should be avoided in the first instance and that net gain should first be delivered on the development site itself, through avoidance, minimising loss and seeking restoration of what already exists. If however this cannot be achieved they must create a habitat either on-site or off-site. The process to determine and measure what the requirement is applies what is known as a biodiversity metric. The metric establishes a baseline, scoring the ecological value of a site against a set of nationally standardised criteria.
- 2.2 Where enhancement is to be provided on site, this should be provided within the red edge of an application. Off-site gains however can be on any land away from the development site, either within a developer's direct control or where a biodiversity unit has been bought from a third-party land manager. As a last resort, where off site land is not available, credits can be bought directly from the government, who will then invest this money in habitat creation as appropriate nationally. All of these options may occur in combination to achieve an overall net gain of at least 10%.
- 2.3 Developers will be able to choose how to source off-site credits. They will not be in the form of a payment to the local planning authority, but instead there will be an open market for biodiversity credits with developers able to choose who they wish to achieve their off-site

¹ <https://www.gov.uk/government/publications/25-year-environment-plan>

² <https://www.gov.uk/government/news/biodiversity-net-gain-moves-step-closer-with-timetable-set-out>

credit with. Given the general challenges and constraints of bringing development land forward there is expected to be significant demand for off-site credits.

- 2.4 The way in which the biodiversity metric works means that units created closer to a development site will be weighted more favourably than those further away or of a lesser ecological priority. This in effect incentivises a developer to shop closer to home when looking for off-site credits.
- 2.5 However, there is a risk that sites outside of Tameside, either in other Greater Manchester districts or even beyond the city region, could be used to offset biodiversity losses caused by development here, particularly if local options do not materialise. Further, risk exists of losing investment in Tameside habitats and ecological priorities, encouraging a process of localised ecological decline if local off-set sites are not ready, available and competitive within the biodiversity net gain off-site marketplace.
- 2.6 It is therefore considered imperative, in managing the above risks, that where the Council has land, over which it has a direct ability to influence its management, that these should be explored as potential off-set sites where developers could invest in to achieve their net gain requirements.

3. GREENSPACE

- 3.1 The Council owns and manages a portfolio of greenspace sites with a diverse range of habitats including mixed deciduous woodland at river valley sites such as Hulmes and Hardy Wood; modified grassland at Copperas Fields; ponds and upland acid grassland at Carrbrook.
- 3.2 The Council currently maintains these sites within the resources available through Operations and Greenspace staff and with the assistance of Greenspace Volunteers. Whilst the management of all sites is acceptable, and in some cases good, resources do not allow the Council to enhance these habitats to their full potential. The Council's resources are rightly focused on maintaining safe public access and conservation work is carried out with the assistance of volunteers.
- 3.3 Biodiversity Net Gain is a great opportunity for the Council to receive external funding to enhance the biodiversity standards on its own land. This will not only enhance the sites but can also assist the Council in meeting its targets around sustainability and achieving carbon net zero.
- 3.4 The land available for enhancement will remain in Council ownership and there will be a contract in place which commits the Council and/or its partners to carry out the enhancement work and then maintain the site for 30 years to the relevant standard as set out in a Management Plan. Therefore, the Council needs to carefully consider the land where it makes units available for sale; once the land is part of a biodiversity net gain agreement it will not be available for sale or commercial/residential development for 30 years. On this basis Officers are currently focusing assessment work on existing recreation areas and countryside sites to be considered for enhancement through net gain. Officers have consulted with Estates and Planning on the list of sites.
- 3.5 In order to understand the amount of biodiversity units available, and the likely cost per unit, Officers worked with colleagues in Greater Manchester Ecology Unit to carry out a desk-based assessment of Council owned land, as well as three sites where there is Council owned land adjacent to land in the ownership of Land Care Ltd and the Hyde War Memorial Trust. The Greater Manchester Ecology Unit looked at the type and condition of habitat on each site and the size of each site in order to establish how many units may be available.

- 3.6 The work carried out by Greater Manchester Ecology Unit demonstrated that within Tameside there was likely to be a need for over 300 units from potential development looking forward. A realistic assessment of the number of units available from the 15 sites listed at **Appendix 1** is 400 units. This is across both Council and non-Council land.
- 3.7 Following the desk-based exercise carried out by the Ecology Unit the Council has commissioned Greater Manchester Environment Fund to carry out full biodiversity net gain assessments on 5 Council sites listed at **Appendix 2**. These sites were identified as they are likely to offer most units, are distributed across the Borough and are within the Council's gift to manage accordingly. This work is to be funded through the government grant referred to above at 1.5 and through the Greenspace revenue budget if this becomes necessary. A further 5 sites are to be assessed in 2024, these sites are listed at **Appendix 2**.
- 3.8 The outcomes of the full assessments of the first 5 sites will be available in October, at which point Officers will be able to publish these sites on the Greater Manchester Unit catalogue which will be maintained by Greater Manchester Ecology Unit and will be available to developers, subject to further member reporting as set out in recommendation 4. The Council could then enter into agreements with developers for these sites.

4. CONCLUSION

- 4.1 The mandatory requirement for new development to provide a demonstrable net gain in biodiversity will have implications for developers and the council both as local planning authority and landowner. A range of activities have been undertaken to prepare for this new requirement as detailed in this report, and work is ongoing to take advantage of the opportunities available to the council. It is expected that as preparatory work continues, notably in regard to assessing and committing council-owned land for offsetting opportunities, that this will be updated through further reporting.

5. RECOMMENDATIONS

- 5.1 As set out at the front of the report.

APPENDIX 1

15 Sites Considered As Part of Desk Based Assessment.

Note: not all these sites are in Council ownership but all seemed likely sites for biodiversity net gain units.

1. Back Wood
2. Carrbrook Valley
3. Castle Clough
4. Copperas Fields
5. Daisy Nook
6. Gower Hey Wood
7. Great Wood
8. Haughton Dale
9. Hulmes and Hardy Wood
10. Jet Amber Fields
11. Roaches
12. Smallshaw Lane Fields
13. Stalybridge Country Park South
14. Sunny Bank Vale
15. Werneth Low Country Park

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APPENDIX 2

5 Sites Currently Being Assessed by Greater Manchester Environment Fund

1. Back Wood
2. Copperas Lane
3. Roaches
4. Smallshaw Lane Fields
5. Stalybridge Country Park

5 sites to be assessed by Greater Manchester Environment Fund 2024

6. Daisy Nook Country Park
7. Gower Hey Wood
8. Great Wood
9. Haughton Dale
10. Hulmes and Hardy Wood

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Agenda Item 9

Report to: EXECUTIVE CABINET

Date: 25 October 2023

Executive Member: Councillor Jan Jackson, Executive Member for Planning, Transport and Connectivity

Reporting Officer: Emma Varnam, Assistant Director of Operations & Neighbourhoods

Subject: PROPOSAL STREET LIGHTING SAVINGS - DIMMING AND TRIMMING

Report Summary: The purpose of this report is to consider options for the council to reduce energy consumption for street lighting. The council seeks to decrease its energy consumption to achieve its commitment to 'Net Zero' by 2038. Options are presented to 'dim and trim' or turn off lighting on the public highway or public realm.

Recommendations: That Executive Cabinet APPROVES:

The implementation of option C2 in principle, to trim and dim the lighting provisions on the council's main road lanterns, subject to:

- options to finance the capital investment of £0.284m required to carry out improvements to the street lighting columns to facilitate dimming and trimming, and this be delegated to the Director of Place in consultation with the Section 151 Officer.
- Progress reporting to on the programme forming part of the regular report to Strategic Planning and Capital Monitoring Panel meetings.

Corporate Plan: The scheme set out in this report supports the objectives of the Corporate Plan, in particular the "Infrastructure and Environment" strand of the Corporate Plan.

Policy Implications: This project will support the councils Climate Change and Environmental Strategy 2021-26 by reducing energy consumption.

Financial Implications: There is an annual revenue budget for the running costs associated with street lighting. These budgets cover the costs associated with street lighting columns and other lit street furniture such as bollards and lit signs. Major repairs or improvements to Street lighting (such as replacement of lamp columns and upgrade to LED lighting) have previously been funded through Capital budgets.

(Authorised by the statutory Section 151 Officer & Chief Finance Officer)

Street Lighting - Electricity		£m
2022/23 Net Revenue Budget		1.310
2022/23 Outturn		1.592
(Under) / Over spend		0.282

Street Lighting - Repairs and maintenance		£m
2022/23 Net Revenue Budget		0.417
2022/23 Outturn		0.420
(Under) / Over spend		0.003

This report is concerned with options to reduce energy consumption, which in turn should generate cost savings. The total cost of electricity for street lighting includes both variable and fixed elements, and the impact of energy consumption reductions will not impact the budget proportionately. The main elements of the gross electricity costs in 2022/23 are summarised below – the changes proposed in this report will only impact on the £0.929m of energy consumption costs for lighting columns.

Electricity Gross Expenditure analysis	£m
Energy Consumption - Lighting Columns	0.929
Energy Consumption - Other lit street furniture	0.368
Distribution & transmission charges	0.272
Other charges & tariffs	0.080
Total Gross Expenditure	1.649

The 2023/24 Budget proposals approved by Full Council in February 2023 included a savings proposal for street lighting of £0.108m which was predicated on the ability to dim, trim or turn off lamp columns. This savings proposal has reduced the net budget available for street lighting energy in 2023/24.

Irrespective of options proposed and then approved by the Executive Cabinet, the savings proposal will not be delivered in 2023/24. Procurement of goods and retrofitting the entire street lighting column estate will take at least 12 months. As such, the savings proposal cannot be considered viable until at least October 2024.

The Section 151 Officer has reviewed the process for budget setting and reported to Executive Cabinet in June 2023 on the changes in train to improve governance and savings delivery for future years, however this proposal is an example of ambitious delivery and lacking the necessary information around up front investment for Members to take strategic decisions around approving the Council budget, which all Members of the Council share in equally. Had the correct information and timeframes been provided, this proposal would not be placing adverse pressure on the General Fund in 2023/24 as it would be correctly profiled to deliver from 2024/25. As such, Place Directorate have put in place management actions to offset the pressure in 2023/24 – but the key point is they need not have done with the right information and delivery planning.

Appendix 1 provides details of the various options that have been considered for reducing street lighting energy consumption, and the related costs. One option is being recommended for approval (C2) which is the dimming (reducing brightness) and trimming (reducing the operating hours) of main road street lights. This option is expected to deliver cost savings of £0.074m based on 2022/23 tariffs. (The saving increases to £0.104m if calculated using the 2023/24 tariff). The annual level of saving or cost avoidance will be dependent on the annual tariff, and will reduce if energy prices drop.

Implementation of option C2 will require capital investment of £0.284m to fit dimming and trimming components to the lamp columns. The Council passed a resolution to not undertake external borrowing and does not have sufficient capital reserves or receipts to finance this investment. To progress with this implementation

requires Executive Cabinet to review its Capital Programme and determine which schemes it wishes to pause or delay starting until such time as receipts are increased to deliver them. Until such a time as this is undertaken, the Section 151 Officer cannot recommend progressing with the actions proposed in this report as the power is not delegated to Officers without Executive Cabinet approval on budget allocation.

**Legal Implications:
(Authorised by the
Borough Solicitor)**

Under Section 28 of the Local Government Act 1966 the Council has the power to provide lighting for the purposes of any highway and also has the power to alter that lighting.

The proposals are part of a savings strategy which includes an investment to upgrade with lighting system in order that the lighting can be dimmed and trimmed. The rationale for this invest to save is set out in the main body of the report and the financial implications.

A compliant procurement exercise supported by STaR should be undertaken for the delivery of the improvement works and such works should be closely managed to ensure that costs remain as set out in this report.

It would be advisable for there to be a period of monitoring after the dimming and trimming has been implemented to ensure that there are no adverse impacts arising.

Risk Management:

- Inclement weather preventing commencement and completion of schemes.

A comprehensive programme of works will be agreed between partners to ensure completion by approved dates. However, should the programme not be achieved it may be necessary to arrange for any outstanding financial resources to be transferred into the following financial year.

- Inability of suppliers to deliver materials within a time frame to meet completion targets.

If the successful supplier cannot meet the demand in line with the proposed installation schedule, then approval will be sought to carry over the project into the subsequent year for completion.

- The ability of the Council's own Engineering Services or external contractors to implement the programme in the timescale of the project.

This risk will be managed by ensuring that should Engineering Services or the external contractor be unable to complete the works during the timescale, approval will be sought to carry over the project into the subsequent year for completion.

- Reduction in lighting levels

Any changes in the lighting levels will be in accordance with the design codes to ensure the Council still has compliant highway lighting in terms of levels of uniformity for the specific area in question.

Access to Information:

This report is not confidential

Background Information:

The background papers relating to this report can be inspected by contacting Lee Holland, Head of Engineering Services:
Telephone: 07970456314
e-mail: Lee.Holland@tameside.gov.uk

1. INTRODUCTION

Proposed approach to variable lighting in Tameside.

- 1.1 The council currently supplies dusk till dawn street lighting on the adopted highway network. The purpose of this report is to consider options for the council to reduce energy consumption and the financial cost of providing the service. The report considers how this will impact the council and its residents, and also if there could be further implications should the council deviate from following recommended best practice and guidance.
- 1.2 The Council has significantly impacted our environmental ambitions by installing LED street lighting across 98% of columns within the borough. The report looks to further reduce the energy consumption and negative impact on our environment by reducing the lighting on our highways and public realm.
- 1.3 The term “street lighting” encompasses all illuminated assets on the adopted highway including streetlights, signs, and bollards. Under the Highways Act 1980, the council has the power (ability), but not a duty (obligation) to provide street lighting. The council currently manages and maintains 25,491 streetlights as well as illuminated signs and bollards on the adopted highway. The inventory grows as new developments are adopted although no extra funding is given to the council, by the developers, to cover these additional revenue costs.
- 1.4 Dimming (reduction in lighting levels) and trimming (putting lights on at a later time and switching off lights at an earlier time) of street lighting are well established options for local authorities looking to make savings. A number of local authorities that have implemented a variable lighting option include Blackpool MBC, Rochdale MBC and Oldham MBC as well as Cornwall County Council, and Northamptonshire County Council. Any decision to reduce lighting levels needs to consider the potential impacts as street lighting plays an important role in relation to crime prevention (including the operation of CCTV) and reducing fear of crime. Street lighting is also relevant to traffic management and road safety and a factor in relation to promoting the night time economy in town centres.
- 1.5 Lighting levels can be set at the individual lighting columns. It is therefore possible to deploy variable lighting that takes account of the characteristics of different areas. This means that the potential benefits of dimming and trimming can be achieved whilst ensuring other objectives are not compromised.
- 1.6 As well as dimming and trimming, another option is switching off streetlights, either for the entire period of darkness or during specific periods (i.e. midnight until 5am). It should be noted that, based on the design standards, a robust risk assessment would be required to justify switching streetlights off on sections of the highway.
- 1.7 The basic premise of the approach set out in this report is that the degree of dimming and trimming should be determined by the requirements of the area in which the street light is situated. This is to mitigate against any adverse impacts while retaining the opportunity to reduce energy consumption. The pros and cons of each option are summarised in section 4 and **Appendix 1** to this report.

2. CURRENT LIGHTING PROVISION

- 2.1 The need for street lighting varies by location. It is generally accepted that urban and residential areas should be provided with street lighting. However, the level and standard of lighting provided will be dependent upon a number of factors.
- 2.2 For example, city and large urban areas may have relatively higher crime rates and may benefit from the provision of a high level of street lighting whereas environmental factors in rural areas may constrain the level and type of lighting considered necessary.

2.3 Councils do not legally have to provide street lighting, however, once provided, the local authority does have a duty to maintain the system in a safe condition. The standards for street lighting are laid down in British Standard: BS 5489 and European Standard BS EN 13201; lighting to these standards is considered best practice, and reasonable justification should be provided if not achieved. Any decisions to implement dimming, trimming or switching off of Street Lighting need to consider whether standards are being met, and any deviation from these standards will need to be justified.

Benefits and Costs of Street Lighting

2.4 The benefits of street lighting are:

- Reduce road traffic accidents;
- Reduce the severity of road traffic accidents;
- Reduce the fear of crime; and
- Promote the night-time economy.

2.5 The costs of street lighting are:

- Financial: Capital, maintenance and energy costs;
- Environmental: Carbon emissions and light pollution; and
- Amenity: Visual and aesthetic impact

3. CURRENT ENERGY COSTS

3.1 Energy costs have significantly increased in the past 18 months due to a volatile electricity supply market. It is imperative that the council reduces its electricity consumption in order to reduce costs. The impact of trimming and dimming will reduce the amount of energy used to light the highway. In financial year 21/22 the council spent £1.113m (8.04300p/kWh) to provide energy to our general street lighting network. The unprecedented energy cost rise has caused significant pressure to the council’s energy budget, in 22/23 the energy cost rose to £1.592m (22.40996p/kWh). An increase of £0.480m compared to the previous year, this equates to a 30.15% increase on 21/22 on energy used only). Further increases in the electricity tariff are expected in the 2023/24 (31.5590p/kWh) financial year this will increase the energy by another 29.02% to £2.243m (estimated).

3.2 Overall in summary the energy consumption increase from 21/22 to 23/24 has increased by £1.13m (50.38%), had we not reduced our energy consumption considerably from 15/16 this figure would have been £5.33m this financial year (14364107.1kW x 31.5590 pence x 17.5% (associated tariffs)

4. OPTIONS FOR REDUCING STREET LIGHTING ENERGY UTILISATION

4.1 As set out in section 1, there are three main options for reducing the energy consumption of street lighting: Dimming, Trimming and Switching Off.

Dimming

4.2 Dimming is turning the light levels down (reducing the brightness), hence using less energy. The light level reduction is not always noticeable as it is a slight reduction in the lighting but does have an impact on the electricity usage of each street lamp.

4.3

Pros	Cons
<ul style="list-style-type: none"> • Reduces energy consumption whilst still providing lighting. 	<ul style="list-style-type: none"> • The side road lanterns would be problematic to dim, given they

<ul style="list-style-type: none"> • Dimming to appropriate levels can be justified within the design standards. • Dimming would still provide residents a level of vision, comfort and security. • There are lots of dimming options available, for example 22:00-05:00 or 00:00-06:00. 	<p>have been designed already to the minimum levels.</p>
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Trimming

4.4 Trimming is reducing the operating hours of the lighting, so that lights go on & off when it's darker.

Pros	Cons
<ul style="list-style-type: none"> • Will provide minimum impact to the public, it will be darker when the lights come on and go off. • The Council will remain within the guidelines of the design standards. 	<ul style="list-style-type: none"> • Minimum savings are achieved and the option is not cost effective unless combined with an additional option.

Switching Off

4.5 Switching Off Street Lighting columns can be considered either as a permanent switch off or to switch off lights between a certain period such as Midnight to 5am.

Pros	Cons
<ul style="list-style-type: none"> • Switching off of street lights will maximise the energy and cost savings to the Council. • Provides the maximum opportunity to reduce the carbon footprint of street lighting. • Switching off lighting columns may reduce light pollution and can have benefits for wildlife and biodiversity. 	<ul style="list-style-type: none"> • Switching off of street lights requires a robust independent risk assessment for each lighting column. This risk assessment process will incur significant revenue costs. • Switching off lighting columns would deviate from the design standards and would need to be justified. • There are potential implications for community safety and traffic safety which would be considered as part of the risk assessment. • Switching off is more noticeable and visible for residents, which may lead to fears for safety.

4.6 To implement dimming, trimming or switching off, each individual light will need to be upgraded with new components. Capital Investment will be needed to complete the work required.

5. PROPOSED OPTIONS

5.1 The Council has looked at a variety of options for reducing energy consumption, with the main road and side road assets separated to provide more flexibility to try and achieve affordable options within an acceptable "payback period".

5.2 **Appendix 1** provides further detail on the options that have been considered, which are summarised as follows:

- **Option A – Trimming** - Reducing the operating hours of street lighting so the lights go on and off when it is darker. Option A1 covers side roads, Option A2 covers main roads.
- **Option B – Dimming** – Reducing the brightness of street lighting to minimum standards (already in place for side roads). Option A1 covers side roads, Option A2 covers main roads.
- **Option C – Trimming and Dimming** – reducing brightness and reducing the operating hours so lights go on and off when it is darker. Option C1 covers side roads, Option C2 covers main roads
- **Option D – Trimming and Switching lights off between certain times.** Option D1 covers side roads, Option D2 covers main roads.

5.3 Options discounted

- **Option A** - Trimming only, on either the main roads or side roads is not a viable option because the payback period is too long
- **Option B** - Dimming only, on the side roads is not a viable option because there is no scope to dim these lights, as they have been designed to the minimum levels already
- **Option D** – would not be feasible for the majority of the network, if not the complete network, given that significant justification would be required to turn street lighting off. The savings calculated, in **Appendix 1**, assume that all lanterns could be switched off which is unlikely

5.4 Risk & Insurance advice regarding proposal to switch off street lighting

The risks in switching off street lighting include, but are not limited to:

- Increased pedestrian slip/trip personal injury claims
- Potential severity of claims due to a lack of lighting
- Crime rates could increase
- Accessibility issues for elderly or disabled residents
- Economical effect of residents not venturing out in the dark

5.5 Possible Insurance Implications:-

- Likelihood of an increased frequency and severity of Public Liability vehicle claims and or personal injury claims from residents
- The decision of turning off the street lights could reduce the chances of being able to successfully defend a claim
- The Council has an Excess of £500,000 per claim for public liability claims so most claims would have to be self-funded by ourselves and it would be highly likely that the Council would be advised to increase the Insurance reserve fund
- Any claim that exceeds the excess level is funded by Insurers and this increases the risk that the council could face additional premium costs at future renewal dates
- Turning off the lights or dimming them is a material fact that the Council would need to disclose to its insurers.

5.6 TMBC's appointed insurance broker has advised that GM authorities in the past have approached Insurers about turning off street lights and Insurers have not supported the decision

5.7 Whilst there are examples of Local Authorities who have tried switching off street lights, roll out has been limited:

- In Derbyshire County Council, a largely rural council, switching off technology has been fitted on approximately 6,500 columns out of a total of more than 89,000 (7% of all columns) and no new switch offs have been identified since 2012
- In Leeds City Council, a small trial was undertaken in a residential area, but feedback from residents and risk assessments concluded that no further roll outs would take place
- Wigan and Bury have fitted switch off controls to a small number of columns in car parks and areas of anti social behaviour but there has been no large scale roll out

5.8 Using dimming only or trimming only will not achieve the required energy savings and the payback period is too long, therefore not viable unless both dimming and trimming are combined as an option. Switching off is not considered to be viable due to the risk assessment process and expectation that only a small number of lanterns could be suitable for switching off in a busy urban area. Option C2 – dimming and trimming on the main roads – is the recommended option.

5.9 **RECOMMENDED OPTION C2 - Trimming and dimming on the main road lanterns only.**

Main Road Lanterns	Savings at 22/23 prices	Cost to implement	Payback at current rate
Trimming – slightly increased darkness switch on/off & dimming to 75% light output 00.00-06.00	£73,614 per annum	£284,200	£284,200 ÷ £73,614 = 3.9 years

Energy savings Main Road Lanterns	Current energy consumption per kWh	Energy savings per kWh	Energy savings per column
Number of columns- 8,120	2,454,805.63	328,454	40.45 kWh

5.10 The council could only feasibly complete this option on the main road lighting stock, as the side road lighting has very limited scope to dim, however savings would be achieved and the council would still be lighting to the required standards.

6. CAPITAL INVESTMENT REQUIREMENTS.

6.1 Capital investment is required to carry out improvements to the street lighting columns to facilitate dimming and trimming. Each street light will need a new component to dim the level of lighting and also to change the time that the light comes on and goes off. The investment required is £0.284m for the main road street lights with the payback period for this being 3.9 years but following the payback period the council will still generate £0.074m saving year on year (at the current tariff). It is important that the council reduces energy costs as they are currently in a volatile market with unprecedented high cost and to reduce the carbon footprint of the council.

6.2 It is anticipated that the scheme will take 12 months to complete. This allows for the procurement process to purchase the new components and the installation period.

7. RECOMMENDATIONS

7.1 As stated on the cover of this report.

APPENDIX 1

Summary of Options:

- **Option A – Trimming - Reducing the operating hours of street lighting so the lights go on and off when it is darker.**
- **Option B – Dimming – Reducing the brightness of street lighting to minimum standards (already in place for side roads).**
- **Option C – Trimming and Dimming – reducing brightness and reducing the operating hours so lights go on and off when it is darker.**
- **Option D – Trimming and Switching lights off between certain times. D(1) would switch lights off between midnight and 5am, D(2) would switch lights off between midnight and 6am.**

Option A- Trimming is reducing the operating hours of the lighting, so the lights go on & off when it's darker.

Option A1 Side Road Lanterns	Savings at current rate	Cost to implement	Payback at current rate
Trimming- slightly increased darkness switch on/off	£3,676 per annum	£614,950	$£614,950 \div £3,676 = 167.3$ years

A1 Energy savings Side Road Lanterns	Current energy consumption per kWh	Energy savings per kWh	Energy savings per column
Number of columns- 17,570	1,692,520	16,404	0.93 kWh

Option A2 Main Road Lanterns	Savings at current rate	Cost to implement	Payback at current rate
Trimming- slightly increased darkness switch on/off	£5,332 per annum	£284,200	$£284,200 \div £5,332 = 53.3$ years

A2 Energy savings Main Road Lanterns	Current energy consumption per kWh	Energy savings per kWh	Energy savings per column
Number of columns- 8,120	2,454,806	23,793	2.93 kWh

Option B- Dimming, turning the light levels down.

Option B1 Side Road Lanterns	Savings at current rate	Cost to implement	Payback at current rate
Dimming to 75% light output 00.00-06.00	£0	£ 0	N/A

B1 Energy savings Side Road Lanterns	Current energy consumption per kWh	Energy savings per kWh	Energy savings per column
Number of columns- 17,570	1,692,520	N/A	N/A

There is no scope to dim the side road lanterns, as these have already been designed to the minimum level allowable.

Option B2 Main Road Lanterns	Savings at current rate	Cost to implement	Payback at current rate
Dimming to 75% light output 00.00-06.00	£59,984	£284,200	$£284,200 \div £59,584 = 3.4$ years

<u>B2 Energy savings</u> Main Road Lanterns	Current energy consumption per kWh	Energy savings per kWh	Energy savings per column
Number of columns- 8,120	2,454,806	267,667	32.96 kWh

Option C- Trimming and dimming, reducing the operating hours and turning the light levels down.

<u>Option C1</u> Side Road Lanterns	Savings at current rate	Cost to implement	Payback at current rate
Trimming- less darker switch on/off & dimming to 75% light output 00.00-06.00 (No scope to dim side roads further)	£5,330	£614,950	115 years

<u>C1 Energy savings</u> Side Road Lanterns	Current energy consumption per kWh	Energy savings per kWh	Energy savings per column
Number of columns- 17,570	1,692,520	23,786	

<u>Option C2</u> Main Road Lanterns	Savings at current rate	Cost to implement	Payback at current rate
Trimming- less darker switch on/off & dimming to 75% light output 00.00-06.00	£73,614 per annum	£284,200	$£284,200 \div £73,614 = 3.9$ years

<u>C2 Energy savings</u> Main Road Lanterns	Current energy consumption per kWh	Energy savings per kWh	Energy savings per column
Number of columns- 8,120	2,454,806	328,487	40.45 kWh

Option D - Trimming and switching off the lights during specific times.

<u>Option D1</u> Side Road Lanterns	Savings at current rate	Cost to implement	Payback at current rate
A. Trimming- slightly increased darkness switch on/off 00.00-05.00	£168,738 per annum	£797,870	4.7 years
B. Trimming- slightly increased darkness switch on/off 00.00-06.00	£191,990 per annum		4.2 years

<u>D1 Energy savings</u> Side Road Lanterns	Current energy consumption per kWh	Energy savings per kWh	Energy savings per column
A. Number of columns- 17,570	1,692,519.84	750,732	42.85 kWh
B. Number of columns- 17,570	1,692,519.84	856,713	44.88 kWh

<u>Option D2</u> Main Road Lanterns	Savings at current rate	Cost to implement	Payback at current rate
A. Trimming- slightly increased darkness switch on/off 00.00-05.00	£244,736 per annum	£351,060	1.4 years
B. Trimming- slightly increased darkness switch on/off 00.00-06.00	£278,460 per annum		1.3 years

<u>D2 Energy savings</u> Main Road Lanterns	Current energy consumption per kWh	Energy savings per kWh	Energy savings per column
A. Number of columns- 8,120	2,454,805.63	1,092,059	134.49 kWh
B. Number of columns- 8,120	2,454,805.63	1,242,522	140.86 kWh

1. Side Roads		Current	Option A1	Option B1	Option C1	Option D1 (A)	Option D2 (B)
Number of lanterns		17,570	17,570	17,570	17,570	17,570	17,570
22/23 Consumption Total (kWh)		1,692,520	1,676,116	1,692,520	1,668,734	939,560	835,802
22/23 Energy Consumption Charge (per kWh)		0.2241	0.2241	0.2241	0.2241	0.2241	0.2241
22/23 Energy Usage Cost		£379,294	£375,618	£379,294	£373,963	£210,555	£187,303
23/24 Energy Consumption Charge (per kWh)		0.3156	0.3156	0.3156	0.3156	0.3156	0.3156
23/24 Forecast Energy Usage Cost		£534,159	£528,982	£534,159	£526,652	£296,525	£263,779
Cost saving at 22/23 prices			-£3,676	£0	-£5,330	-£168,738	-£191,991
Cost saving at 23/24 prices			-£5,177	£0	-£7,507	-£237,634	-£270,380
Implementation Cost			£614,950	£0	£614,950	£797,870	£797,870
Payback period (22/23 prices)			167.3	n/a	115.4	4.7	4.2
Payback period (23/24 prices)			118.8	n/a	81.9	3.4	3.0
2. Main Roads		Current	Option A2	Option B2	Option C2	Option D2 (A)	Option D2 (B)
Number of lanterns		8,120	8,120	8,120	8,120	8,120	8,120
22/23 Consumption Total (kWh)		2,454,806	2,431,013	2,187,139	2,126,319	1,362,724	1,212,235
22/23 Energy Consumption Charge (per kWh)		0.2241	0.2241	0.2241	0.2241	0.2241	0.2241
22/23 Energy Usage Cost		£550,122	£544,790	£490,138	£476,508	£305,386	£271,662
23/24 Energy Consumption Charge (per kWh)		0.3156	0.3156	0.3156	0.3156	0.3156	0.3156
23/24 Forecast Energy Usage Cost		£774,737	£767,228	£690,261	£671,066	£430,076	£382,581
Cost saving at 22/23 prices			-£5,332	-£59,984	-£73,614	-£244,736	-£278,460
Cost saving at 23/24 prices			-£7,509	-£84,476	-£103,670	-£344,661	-£392,155
Implementation Cost			£284,200	£284,200	£284,200	£351,060	£351,060
Payback period (22/23 prices)			53.3	4.7	3.9	1.4	1.3
Payback period (23/24 prices)			37.8	3.4	2.7	1.0	0.9
Total Potential Savings			Option A	Option B	Option C	Option D (1)	Option D (2)
Cost saving at 22/23 prices			-£9,008	-£59,984	-£78,944	-£413,474	-£470,451
Cost saving at 23/24 prices			-£12,686	-£84,475	-£111,177	-£582,295	-£662,535

Report to:	EXECUTIVE CABINET
Date:	25 October 2023
Executive Member:	Councillor John Taylor - Adult Social Care, Homelessness & Inclusivity
Reporting Officer:	Stephanie Butterworth – Director of Adult Services
Subject:	CONTRACT FOR THE PROVISION OF AN E-CONTRACT PERFORMANCE SYSTEM
Report Summary:	The Commissioning and Home for All Team wishes to procure and implement an electronic contracts performance system with the intention that the system is utilised to support the quality assurance and monitoring of the care market. This would initially focus on accommodation and community based services, namely care at home, care homes (residential and nursing), supported living and extra care housing.
Recommendations:	To approve the procurement of the Provider Assessment and Market Management System (PAMMS), as a call off contract, to be procured via the Government Cloud (G-Cloud). G-Cloud is a UK government initiative to ease procurement of cloud services by government departments and promote government-wide adoption of cloud computing.
Corporate Plan:	This would help the Council deliver its priorities: <ul style="list-style-type: none">• Help people to live independent lifestyles supported by responsible communities.• Improve Health and wellbeing of residents• Protect the most vulnerable
Policy Implications:	None
Financial Implications: (Authorised by the statutory Section 151 Officer & Chief Finance Officer)	<p>The recommendation in this report seeks approval to procure a e-contract performance system as a direct award for PAMMS provided by The Access Group.</p> <p>Budget within Adult Social Care has been identified from the Improved Better Care Fund (iBCF) to fund the system, totalling £0.033m per annum. This is a recurrent grant received from the Department for Levelling Up, Housing and Communities.</p> <p>Part year implementation of the system, following procurement, in 2023/24 would result in a cost of £0.003m to the service for each month of operation.</p> <p>Although the PAMMS system currently only supports the Adult Social Care sector, as stated in 4.19 of the report below, there may be scope to expand/adapt this to other portfolios in the future, e.g., population health, children’s services. This could lead to future years budgetary savings and efficiencies due to economies of scale.</p> <p>The Directorate need to ensure that appropriate break clauses are included within any contract arrangement. This will ensure that the commissioned service can either be reduced or withdrawn in the</p>

event of the same impact on related funding. This is to mitigate any adverse financial impact on the Council.

Any uplift in commissioned contract values due to inflation, demand or service configuration will need to be taken into account within the service specification to ensure that it is affordable within the available annual budget allocation for the contract duration.

It is essential that value for money is evaluated as part of the direct award and that this is clearly evidenced and retained for section 151 officer assurance.

In addition an Executive Decision will be required to award the resultant contract. This is in accordance with the value thresholds within the Council's Financial Regulations approved at full Council on 5 October 2021 – section 4 Procurement Decisions – Award Of New Contracts within the section headed 'Financial Delegations' refers. The Council's Financial Regulations are available for reference via the following link.

[Financial Regulations \(moderngov.co.uk\)](https://www.moderngov.co.uk)

**Legal Implications:
(Authorised by the
Borough Solicitor)**

Advice has been sought from STaR procurement to ensure that a compliant procurement process has been followed and Best Value delivered.

Risk Management:

Risks will be identified and managed by the appropriate officers.

Access to Information:

The background papers relating to this report can be inspected by contacting



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1. INTRODUCTION

- 1.1 Over the last 4 years there has been significant 'interest' in the registered care home market across Greater Manchester (including Tameside) as the outcomes from Care Quality Commission inspections had previously identified GM as one of the worst performing area in England. Since then, performance had significantly increased. However, following the pandemic, Tameside's care homes (older people) have reduced from 86% rated Good or Outstanding to 79% (with two providers rated Inadequate). Whilst the situation has recently improved this was following significant input from the council and allied health partners.
- 1.2 PAMMS (Provider Assessment and Market Management System) has previously been demonstrated to GM Heads of Commissioning, as well as being implemented by Bolton, Salford & Oldham in 2019. Tameside was also considering adopting PAMMS but the impact of the pandemic delayed this, but we are now back in a position to reconsider the implementation.
- 1.3 Tameside's current contract performance process has been in place since November 2017 and has contributed to the significant improvement in CQC ratings in the borough; however, the system does not support easy reporting as it's manually intensive when gathering/reporting on data.
- 1.4 The 'People at the Heart of Care – 10-year adult social care strategy' notes that *"In partnership with providers, local authorities and their partners, we will review current data collections and publications, ensuring they have a clear purpose and are proportionate, and fill remaining data gaps to ensure we have robust data flows. For the data that are collected, we want to ensure they are shared more widely so that those in the sector have the data and local intelligence needed to operate effectively and deliver improved outcomes for those receiving care and support. The commitment to implement digital social care records over the next three years (chapter 4) will also benefit providers by enabling the automated collection of necessary data in a secure and transparent way, reducing the administrative burden on providing information and freeing up more time to care"*.
- 1.5 Part on the ongoing review of processes, which includes the recent introduction of an Escalation and Accountability Framework, is to look at information and data flow to support services to improve. The PAMMS will create a digital interface to support this improvement by enhancing the Council's ability to interrogate the data in a timely manner.
- 1.6 Better use of the data will help to identify potential issues sooner, will hopefully enable preventative action to take place (via the Escalation and Accountability Framework and Multi-Agency Concern process embedded within it), therefore reducing the risk of poor delivery of care & support to vulnerable people.
- 1.7 The Council will soon be under the regulation of the Care Quality Commission and access to timely information/reports with regards to the current market position (in relation to quality) is necessary to demonstrate the Council has robust systems/procedures in place to support providers, take action (where necessary), with the ultimate aim of ensuring that people receive good quality care and support.
- 1.8 Implementation of the PAMMS will assist with the information sharing with other local authorities (and vice versa), i.e. it will allow the Council to be able to quickly see the outcome of a host authority contracts visit (for those Councils that also use PAMMS) and for all interested parties to work in partnership to support the provider to improve their services. This will also help with managing the market on a wider footprint.

2. CURRENT POSITION

- 2.1 The Commissioning & Home for All Team currently uses a contracts performance process which uses electronic tools, but cannot be used to easily produce reports, i.e., the reporting tools are completed (typed in), but to identify any issues the 'compliance' level data needs to be transferred to a separate spreadsheet for any reports to be run. This is both time consuming and can be prone to errors as data is manually transferred. Any necessary service improvement actions from each visit also needs to be identified separately and some may be overlooked when service development improvements plans are being developed.
- 2.2 Contracts Performance visits to nursing homes are undertaken jointly with colleagues from the Individualised Commissioning Team on GM ICB (Tameside).
- 2.3 Information/outcomes from contracts visits to all care home, support at home and supported living providers, along with a range of other information, is aggregated and reviewed by various operational quality groups, as well as by a strategic quality group. All these groups are operated in conjunction with the GM ICB (Tameside), and again, the aggregation of data to inform the various groups is time consuming and prone to human error.
- 2.4 The existing process does not allow the provider to challenge the outcome of the performance visit and, as a result of this potential lack of transparency/approval from the provider, the outcome of the visit is not shared publicly.
- 2.5 There is currently a lack of consensus across Greater Manchester as to a preferred quality assurance and market management tool, albeit three GM Councils have adopted the PAMMS system (Bolton, Oldham and Salford).
- 2.6 Rochdale and Wigan have implemented Sundown, and another three areas use this system as a bed tracking tool (vacancy monitoring).
- 2.7 Trafford are planning to implement In-tend, but this is primarily aimed at collecting KPI data, rather than a full contracts performance system (which includes quality assurance).
- 2.8 Lancashire (along with Blackpool Council, Blackburn with Darwen and the respective ICB) have recently tendered for an eContracts Management system. They received three tenders – The Access Group (PAMMS), Adam & from an organisation that would effectively undertake the contracts performance process and provide reports. Adam pulled out of the tender process as this system was purchased by The Access Group. Following an evaluation PAMMS was deemed to be the most appropriate and is being implemented.

3. DEMONSTRATIONS

- 3.1 Given the view of best practice within the 'People at the Heart of Care' i.e., to work collaboratively across a region, a group of people viewed both the PAMMS and Sundown systems.
- 3.2 This group consisted of a number of people involved in overseeing contracts performance within the Commissioning and Homes for All Team i.e., Trevor Tench, Tim Wilde, Siobhan Gough, Ruth Stevens, Jane Seel, Catherine Worsnip, Jennie Pimlott and Juliet Edwards, as well as others from the NHS GMICB i.e., Jayne Wilkinson, Jane Bennett and Anna Livingstone.
- 3.3 After both the presentations the following feedback was received:
 - 3.3.1 PAMMS was good, easy to use and seemed very 'slick', liked the potential to share outcomes online, has additional functionality should we need it (market position statement, demand model, risk profiler)

3.3.2 Sundown seemed to do similar things, but needed further work to give us what we wanted e.g., reporting; it seemed more basic; didn't appear as easy to use as PAMMS

3.4 Overwhelmingly, those who viewed both products preferred the PAMMS.

4. PROPOSAL

4.1 Tameside needs to move to an eContracts Quality Assurance/Performance process to ensure that accurate reports can be easily run, as well as to help manage risk within the sector.

4.2 Information from STAR Procurement noted that, if a suitable system is on G-Cloud, the Council could either do a min call-off from that list or, if there is only one product that matches our requirements, undertake a direct award.

4.3 There were two systems in the G-Cloud that seemed to focus on the social care market (Adam & PAMMS), both of which are now owned by The Access Group, and Adam has been absorbed by PAMMS. Please note that Sundown is not on the G-Cloud. Therefore, we are proposing a direct award to The Access Group (who own and operate PAMMS).

4.4 The suite of modules on offer, via PAMMS, includes:

Quality Assurance - assessment and corrective action planning tool to support collaborative working with Providers to increase quality.

- Provider Returns - digitising providers' self-assessment as well as other regular or emergency returns, to support contract management. This will reduce the administrative burden on providers as they will only need to review information for subsequent returns.
- Social Care Landscape - Delivers actionable intelligence to monitor risk and support contract management through market insight packs including population & demand, spend & activity, capacity & availability and quality & risk.
- Market Position Statement - use your social care data to construct interactive and automatically updated Market Position Statements.
- Demand Model - a market management tool that helps Local Authorities closely monitor their activity levels and makes highly accurate predictions about future demand / budget requirements.
- Risk Profiler - bring together intelligence sources to evidence quality and financial risks amongst care Providers to support commissioning decisions and target help where needed.

4.5 The Council would need to work with the NHS GMICB (Tameside) and the providers to determine whether the outcome of contracts visit is published, in line with other Council that have adopted the system e.g., East ADASS ([PAMMS Provider Portal](#)).

4.6 The initial proposal is to purchase the Quality Assurance & Provider return modules (similar to Bolton, Salford & Oldham). The MQIS (Market Quality & Insight System) developed in the NW will provide additional information re: the social care landscape and risk profiler.

4.7 The purchase of the two modules will also keep the costs lower and allow for an evaluation of the system to determine if other modules may be beneficial.

4.8 The cost associated with the system is noted in the financial section (these costs will be fixed for a two-year contract).

4.9 The annual cost of the system is noted below. To ensure the best use of the system it is recommended that the Quality Assurance and Provider return modules are purchased

together:

Pricing Options	Cost Per Month	Annual Cost	Notes
Quality Assurance (10 Licences)	£2,306	£27,667	Includes implementation, support and hosting
Provider Returns	£1,756	£21,067	Includes implementation, support and hosting
Combined Price (QA 10 Licences +PR)	£2,734	£32,814	Includes implementation, support and hosting

- 4.10 Additional QA licences can be purchased at £75 per licence per month.
- 4.11 Initially, it is anticipated the Council would need to purchase 10 licences.
- 4.12 At present the system is focussed on Adults Social Care - mainly care homes and domiciliary care providers. However, there may be scope to expand/adapt this to other portfolios in the future, e.g., population health, children's services.

5. ALTERNATIVE OPTIONS

- 5.1 **Alternative Option 1:** Not to implement eContracts Performance and continue with the current process.
- 5.2 Pros:
 - 5.2.1 No additional expenditure required
 - 5.2.2 No loss of direct control of how the contracts performance process operates
- 5.3 Cons:
 - 5.3.1 Current risk profiling and contracts compliance processes are time/resource intensive and may be prone to errors
 - 5.3.2 Reports cannot be easily generated
 - 5.3.3 No information sharing with other authorities that use PAMMS (currently three other GM Councils, Yorkshire & Humber, East ADASS region and six Councils in Liverpool City region)
 - 5.3.4 Lack of transparency with publishing reports
- 5.4 Not to have a Market Management System and continue with the current process. This would mean that capacity within the Commissioning and Homes for All Team would not be targeted based on appropriate information, it would therefore not be as effective in the use of resources. This could potentially result in less effective responses to safeguarding concerns and less effective quality and performance management.
- 5.5 **Alternative Option 2:** To go out to market via a procurement process. The potential risks to this approach are as follows:
- 5.6 The highest scoring tender may not provide the full capabilities available via PAMMS, as tested effectively in the East of England.
- 5.7 Based on the recent tender by Lancashire – there are no other providers who offer the same capability as the PAMMS system, so tendering would not yield any results.

6. IT IMPLICATIONS

- 6.1 Discussion have taken place with the Council's IT Department and the initial view is that because the system is hosted by the provider on their servers, there does not appear to be any IT implications/requirements if the Council purchases the system.
- 6.2 However, if a direct award is approved, a meeting will be arranged with the System Management Team to ensure there are no implications.
- 6.3 In the interim, a Cyber Security Questionnaire has been shared with the provider for completion and, if a direct award is approved, a DPIA (Data Protection Impact Assessment) will also be completed/agreed (please note no personal information will be stored on the system).
- 6.4 Any contract will be subject to the satisfactory completion/assessment of the Cyber Security questionnaire.

7. CONCLUSION

- 7.1 The implementation of PAMMS will have several benefits to the Commissioning and Homes for All Team e.g.:
 - 7.1.1 To aid the implementation of the White Paper's recommendation i.e., "*... review data collections and publications, ensuring they have a clear purpose and are proportionate, and fill remaining data gaps to ensure we have robust data flows...*", the implementation of PAMMS.
 - 7.1.2 To provide information on the outcomes of visits in a more timely, less resource intensive manner.
 - 7.1.3 Reduce potential inaccuracies in copying data to provide reports.
 - 7.1.4 Assist to provide appropriate evidence to the Care Quality Commission that the Council has robust systems/procedures in place to ensure providers are delivering the appropriate care and support to the people who need the service. This also provides evidence that the Council's is supporting its Care Act Duty to "*facilitate a vibrant, diverse and sustainable market for high quality care and support*".
 - 7.1.5 Allow for the sharing of information between Commissioners, some of whom may be funding people in care homes in Tameside.
 - 7.1.6 Allow for publishing the outcomes of the Council's contracts performance process, which can be viewed alongside the CQC ratings, to give prospective residents a better understanding of the service.

8. RECOMMENDATIONS

- 8.1 As set out at the front of the report.

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REPORT TO:	EXECUTIVE CABINET
Date:	25 October 2023
Executive Member:	Councillor John Taylor - Executive Member (Adult Social Care, Homelessness & Inclusivity)
Reporting Officer:	Stephanie Butterworth – Director Adult Services
Subject:	ADULT SERVICES HOUSING AND ACCOMMODATION WITH SUPPORT. PRIVATE RENTED ADULT SERVICES HOUSING OPPORTUNITIES IN THE PRIVATE RENTED SECTOR TO SUPPORT ADULTS RESETTLEMENT PROGRAMME
Report Summary:	<p>As outlined in the Adult Services Housing and Accommodation with Support 2021-2026 report that was approved at Strategic Commissioning Board (SCB) 16 December 2020 - the demand for accommodation with support in Tameside is now outstripping supply. There are currently 55 people on the waiting list held in Adult Services by its Accommodation Options Group (AOG), and there are 8 people identified for transition in the next two years from Children's Services requiring 24-hour support who need to be planned for. In addition, the number of people with a learning disability or mental health needs living in costly out of borough places has increased recently, primarily due to the lack of supported accommodation capacity locally to meet need. There is a real concern that without increasing capacity such costly placements will very quickly become long term and the opportunity to return people to supported living in the borough at a reduced cost will be lost. The report outlined a range of accommodation schemes needed over the coming 3-5 years to meet current and future need across all adult groups.</p> <p>The properties being offered by Private Sector Landlords are in line with the range of accommodation identified in the SCB report and would provide quality accommodation to meet the needs of a group of service users that are currently placed in out of borough placements realising a potential cost saving to the authority.</p>
Recommendations:	<ol style="list-style-type: none">1) That approval is given for Adult Services to progress accommodation options through the private rented sector, to increase capacity in the borough for the provision of supported accommodation for adults with care act eligible needs to live in their own homes.2) That authority is given to the Director of Adult Services to agree terms, in consultation with the Head of Legal to enter agreements to secure property to deliver 24 hour supported accommodation for individuals with care act eligible needs.3) That authority is given to the Director of Adult Services to agree, in consultation with the Head of Legal and Director of Resources, the delivery of the care and support through the in house homemaker service at each property given the complex needs of the people identified for resettlement, thereby delivering best value for the Council.
Corporate Plan:	<p>The service links into the Council's priorities :-</p> <ul style="list-style-type: none">• Help people to live independent lifestyles supported by responsible communities.• Improve Health and wellbeing of residents

- Protect the most vulnerable

Policy Implications:

The “People at the Heart of Care: Adult Social 10 year strategy to include all those who interact with social care. Not just those accessing direct services that have been identified as having eligible needs under the Care Act 2014 or assessed as requiring preventative services to delay eligibility and entrance to eligible services. It also includes new burdens on local authorities for those who currently self-fund their care and support needs.

Financial Implications:

(Authorised by the statutory Section 151 Officer & Chief Finance Officer)

The recommendations in this report seek to obtain authority to enter into agreements with private landlords to gain access to the private rental sector to alleviate the current demand for properties for Adult Social Care services users.

There are current demand pressures and overspends within adult social care, particularly in high cost supported accommodation and residential placements. The period 5 financial position was a forecast overspend of £4.428m for the service. The recommendations in this report look to reduce costs within adult social care by obtaining in borough private rented accommodation to reduce the need for more expensive out of borough placements. Based on the scenarios in Appendix A of the report, there is an estimated annual cost saving of £0.533m. The part year impact in 2023/24 will need to be calculated when individual properties are secured and service users resettled into the properties.

The service is looking to enter into tri-party agreements with private landlord and registered providers to obtain access to private rental properties. The rental cost and services charges would be entirely covered by housing benefit claims by the service user under exempted accommodation. The cost to the Council would be the support provided as part of the service users care package.

The service has also stated that an additional Assistant Team Manager may be required if the internal homemaker service took on an additional 5 properties. This would be an additional cost pressure which would need to be factored in when considering any new properties for the internal service. Any request for additional recruitment would need to be made as part of an Executive Decision to bring any private properties online with the service.

The main financial risks around this approach would be the cost to the Council of any void periods. As the properties are rented from private landlords, the rental charge will be at full market value. This will result in a higher cost for any void periods compared properties rental from the social housing sector. The service would need to ensure that any void periods are minimised to fully achieve any saving against external provision.

Other financial risks include the risk of any change to current housing benefit regulations, this could result in the full rental value or service charge not being covered by the housing benefit claim. While the likelihood of this risk is minimal as there are no current plans to change housing benefit regulations, this could be a risk in any future agreement with private landlords.

The service can mitigate this risk by having increased flexibility on rental terms with private landlords, where smaller rental terms such as 12 months can be agreed. Social Landlords usually ask for lengthier terms to secure the rental income for properties.

The scenarios in Appendix A of the report are costed using 6 current service users with high-cost packages of care who are included on the resettlement plans as part of the current year savings requirement of £0.750m. The comparison used in Appendix B is between the current weekly cost of the service user's package and the cost of providing the same package of care in borough using the Councils in-house homemaker service.

While these scenarios are given as a guide to the potential savings that could be made. Each potential property that comes into scope would require a detailed business case to ensure that the property is both suitable for the individual and is financially viable compared to the current cost of the care package.

As part of the business case, all options should be considered including providing the care support from external parties to achieve best value for money for the Council.

The Directorate need to ensure that appropriate break clauses are included within any future contract arrangements. This will ensure that the commissioned service can either be reduced or withdrawn in the event of the same impact on related funding. This is to mitigate any adverse financial impact on the Council.

Any uplift in commissioned contract values due to inflation, demand or service configuration will need to be taken into account within the service specification to ensure that it is affordable within the available annual budget allocation for the contract duration.

It is essential that value for money is evaluated as part of the tender submission review process and that this is clearly evidenced and retained for section 151 officer assurance.

In addition an Executive Decision will be required prior to award of the resultant contract. This is in accordance with the value thresholds within the Council's Financial Regulations approved at full Council on 5 October 2021 – section 4 Procurement Decisions – Award Of New Contracts within the section headed 'Financial Delegations' refers.

The Council's Financial Regulations are available for reference via the following link.

[Financial Regulations \(moderngov.co.uk\)](https://www.moderngov.co.uk)

**Legal Implications:
(Authorised by the
Borough Solicitor)**

As set out in the main body of the report an opportunity has arisen which could assist the current position relating to adults accommodation.

Legal services will support the project officers to ensure that appropriate legal agreements are entered into including the tri parte agreement, leases and commissioning arrangements with due diligence being undertaken prior to any legally binding agreements being entered into.

Risk Management:

Risks will be identified and managed by the appropriate officers.

Background Papers:

The background papers relating to this report can be inspected by contacting Adam Lomas

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1. INTRODUCTION

- 1.1 The Council has a proud record of supporting adults who have complex needs requiring 24 hours per day support in ordinary housing – in both group homes and in larger schemes of self-contained flats. This started in the early 1990s with supporting people to move out of institutional care - both from long stay hospitals and local authority hostels - into ordinary housing in the community with the support required to meet assessed needs.
- 1.2 The demand for supported living schemes in Tameside is outstripping supply and there is therefore a need to expand the amount of supported accommodation to meet this. There are currently:
- 55 people on the waiting list held by Adult Services Accommodation Options Group (AOG).
 - 29 people identified for transition from Children’s Services in the next four years (16 within the next two years) all of whom require 24-hour support.
 - 22 people that are currently supported by family in the community who will require supported accommodation in the longer term.
 - 25 people supported in 10 shared houses which have been identified as not fit for purpose for their longer-term needs.
 - In addition, the number of adults with complex needs living in costly out of borough placements continues to increase primarily due to the lack of capacity in services locally to meet need. Without increasing capacity such costly placements will very quickly become long term and the opportunity to return people to supported living in the borough will be lost.
- 1.3 Information from the Tameside Housing Needs Assessment (December 2017) highlights that:
- By 2031 there will be a need for an additional 83 units of specialist accommodation for people with learning disabilities
 - Within the same timescale a need for an additional 281 units of supported accommodation for people with mental health needs
 - By 2035 we need an extra 720 wheelchair friendly homes, including 187 fully wheelchair adapted properties.
- 1.4 This need has been further clarified in Adult Services Market Position Statement, which was agreed at the September 2023 Cabinet. This statement highlights a need for seven two-four bed houses for individuals with learning disabilities/ autism care needs, and ten three-five bed houses for individuals who require bespoke housing solutions.
- 1.5 As part of the Council’s cross cutting budget work, we continue to develop a programme including resource requirements, provision, and type of accommodation to meet the current identified need and projections. This will focus on supporting all adults to Live Well at Home, whilst we will continue to source new accommodation from the marketplace with partners to deliver this in a timely manner utilising existing and new resources.
- 1.6 The Council continues to face significant budgetary challenges and Adult Services has been proactive in reviewing its models of service delivery, looking at innovative approaches to deliver high quality services whilst reducing the cost of provision significantly.
- 1.7 One significant area of service delivery, and therefore adult social care budget, is the delivery of 24 hour supported living for people with complex needs. In particular, the provision of support in single service accommodation were out of area and off contract provision is high cost. The move to larger schemes of self-contained flats offering 24-hour support to people with complex needs, such as Mount Street have successfully challenged the need for group living delivering positive outcomes, and in the process improving the quality of lives of people who have complex needs living for the first time in their own apartments. However, there are

an identified cohort of young adults who require individual services whose complex needs cannot be met in larger schemes, so an alternative option is required.

- 1.8 Alongside this new demand, Adult Services constantly reviews the accommodation it uses to provide support to people and concluded that 10 of the properties currently being used are no longer fit for purpose and do not match the ambition Adult Services has for the people it supports. It is also the case that not all the people living in group homes need to remain in such settings and are ready, to move into their own self-contained accommodation in larger schemes with appropriate access to 24-hour support.
- 1.9 Consultation with individuals via the 'My House, My Home' exercise has identified people's choices and preferences for where they live, and for a significant number this model of living is proving to have enhanced their feeling of personal self-worth and improving their outcomes. The proposed properties may allow for some of these outdated properties to be removed from the housing stock as choice of homes is widened and individuals are able to move into their chose accommodation with appropriate support.
- 1.10 With the success seen in Tameside's in house and contracted supported living schemes Adult Services have been looking at opportunities to apply this approach further to deliver the benefits of supported accommodation for people. The aim is to increase the capacity of accommodation in the Borough to allow for individuals to return from costly out of borough or off contract placements, meeting their identified needs locally and reconnecting them to their local family and support networks, and in so doing delivering wherever possible savings or avoiding/managing costs as demand grows over the coming years.
- 1.11 A report was presented to Strategic Commissioning Board (SCB) on 16 December 2020 outlining a range of accommodation schemes needed over a period of 3-5 years to meet current and future need across all adult groups. The Adult Services Market Position statement that was approved at Cabinet on 27 September 2023 provides confirmation for the plans presented by Adult Services working with colleagues in Growth to increase capacity in the borough for the provision of accommodation with support for the range of adult service users enabling them to live in their own homes.
- 1.12 Work has progressed significantly in relation to defining the current and future housing requirement across Adult Services which is designed to meet the growing number of people requiring support to "Live Well at Home". Increasing the availability of high-quality accommodation with support will ensure that Tameside people can continue to live in Tameside, closer to family and local links rather than be placed due to lack of capacity or expertise in high-cost placements outside of the Borough.

2. PROPOSAL

- 2.1 The ambition of Adult Services is to seek modern accommodation, either existing property built within the last ten years or totally new build schemes that meet existing and future needs. No longer should the service compromise its ambition for the people it supports by accepting properties that are simply just "good enough" to provide a short-term solution to prevalent pressures rather than developing long term answers that provide "homes for life".
- 2.2 Working with the approval given at SCB in December 2020, and confirmed in the Market Position Statement in September 2023, discussions have been ongoing with a range of providers in relation to the accommodation needs of all adult groups. An opportunity has been identified working closely with Housing colleagues in Place Directorate to work with a range of Private Rented Sector Landlords for the exclusive use of a range of their privately rented stock across Tameside that fit the ambition of Adult Services.

- 2.3 The Council has worked successfully with Private Landlords on a range of supported housing schemes along with a larger a block of self-contained flats successfully meeting the needs of our service users.
- 2.4 The Private Sector Landlords have offered a number of properties to TMBC Adult Services for the provision of supported accommodation. There is potential for more of properties to be offered in the future as they become available, and they will need to meet our supported accommodation requirements. The proposal is for Service Users to become permanent tenants of the identified accommodation and the local authority to commission the support. All properties offered are within Tameside and all future offers will be within Tameside.
- 2.5 Due to the pace of the market this report has been produced before due diligence work has been completed. This will be completed with advice and guidance from legal and finance teams before any agreements are entered into.
- 2.6 The proposed offer is that TMBC enter into a Support/Management agreement behind the letting guaranteeing 100% rights of nomination. The terms of this are yet to be agreed, however the identified landlords are willing to work with a Registered Provider partner (RP), identified via the Tameside Registered Provider Partnership, though a triparty agreement which would be the preferred option from TMBC Adult Services and is in line with existing arrangements.
- 2.7 A tri-party agreement would be utilised so the landlord and the identified RP would undertake all the building repairs, maintenance and tenancy management arrangements, and TMBC provide the commissioning of the support. This option allows the housing and support to be separate agreements allowing TMBC more flexibility in commissioning the support contracts allowing for increased efficiencies.
- 2.8 The tri party agreement would set out the roles of each party, the Landlords would in the agreement retain ownership of the property and offers the direct tenancy to the Adult Services nominations. The RP acts and the landlord's managing agent and undertakes all the property and tenancy management responsibilities, with Adult Services acting as the commissioner with the responsibility for providing the support.
- 2.9 Through their participation in the Registered Provider Partnership, a group of registered providers have provisionally agreed to undertake the role of the supporting RP. A request for a partner will be sought via the partnership whereby TMBC will have right of nomination and responsibility for the commissioning of the care and support provision and all property related matters will be managed via the partner RP.
- 2.10 The rent will be covered via housing benefit using exempted rents so there will be no subsidy loss to the Council when a property is tenanted. The owner/landlord will retain all responsibility for all repairs and maintenance, property insurance etc. funded via the eligible service charges.
- 2.11 The Adult Services 'Homes for All' team have considered the properties for identified service users who are currently placed OOB and feel they could be appropriate for identified needs, subject to any works required.

3. SUPPORT OPTIONS

- 3.1 Given the potential complexity of the support provision, and the potential speed of delivery, it is proposed that TMBC provide the support via the TMBC Long Term Support Homemaker services. Provisional estimated costings have been drafted with information from Homemakers and Finance to give estimated costings for the identified individuals

- 3.2 Whilst soft market testing of exiting LD contractors it has been decided that given the complexity of the people to be resettled, the speed needed to access the private rented sector properties, and the mobilisation of staffing to support people, the best value option to progress the resettlement would, be to progress with the in-house provider for the people identified for this project.
- 3.3 The in-house service has a very strong record of supporting people with very complex needs, providing improved quality of life and opportunities, and moving people to requiring less support in reasonably sort time scales. For example, a young man returned to a new build property in the borough – had a staff team put in place with two people working with the individual at all times and given the work over the last two years this individual is now ready to move on to shared accommodation with the next goal of moving to their own tenancy.
- 3.4 It is also worth noting that the in house provider has taken on properties from our external provision where complexity of individuals and/or their families has forced our independent providers to hand properties back to the Council. Whilst this is rare having situations where properties are handed back is far from ideal, is costly and is not in the best interests of the individuals being supported perspectives.
- 3.5 At this stage no tendering route has been considered given the potential speed of delivery of the properties. If, however the Homemaker Services is unable to meet the demand, pen pictures of need could be shared through the GM LD framework Procurement Route for each individual property may be an appropriate solution.

4. IDENTIFICATION OF POTENTIAL SAVINGS

- 4.1 These properties have been identified as part of wider plans to build supported living capacity to support people to live in their own homes in the borough.
- 4.2 The additional properties are in line with the range of accommodation identified in the report approved in December 2020 and the Market Position Statement approved in September 2023 and would provide quality accommodation to meet the needs of up to six people currently placed in out of borough placements.
- 4.3 The properties will be for the housing of a younger adults currently supported in an out of borough or off contract placements. These packages are currently costing the Council £2.307m per annum. Once the individuals are settled after a period of transition, we are working towards the cost of support being reduced to achieve a saving of £0.533 per annum. The formulation of these figures can be found in annex A
- 4.4 The accommodation outlined is critical in contributing to the management of costs in relation to current and future demand.
- 4.5 The additional capacity supporting these individuals within the borough will require more staff – new jobs will therefore also be created locally, and individuals being supported will be spending their income in the local area.
- 4.6 The rent for the two bed single occupancy properties is estimated to be set at £275.00 per week, with an additional service charge estimated to be £63.91 per week. The three bed properties are estimated to have a rent of £323.00 per week with an estimated service charge of £63.91. In consultation with the Council's Property Management Team this level of rent, for the single person occupancy, whilst at the higher end, is not unusual where supported accommodation is being made available for people with complex needs. The increased rental cost is due to the private rented sector not being able to access grant funding to reduce capital investment leading the rental cost to be reflective of the full market value cost. Work will be undertaken with Estates colleagues to ensure best possible value is negotiated for the

authority. The added value to the authority of the increased cost is increase opportunity to access high quality property which is available for occupation in the immediate/ short term to meet our most acute demand.

- 4.7 The RP partner will be providing a housing management function at the proposed scheme and will retain the eligible service charges identified above. These charges are added to the core rent on the full rent schedule to fund the additional work required in recognition of the delivery housing for individuals with long term complex needs. Examples of these duties include increased tenancy support, housing repair and maintenance funding, additional insurances etc. Such charges will be in line with those currently levied on similar schemes.
- 4.8 The rent and service charges will be funded via Housing benefit as the proposed services qualify for exempted housing benefit rates.
- 4.9 The Landlords have explained they are requesting for an initial agreement with the Council for up to five years, but there will be available an option to terminate at the third year, giving a six month notice period.
- 4.10 The RP partner and Landlords will provide the building management and housing management function at the property so the rent and service charge will be directed in their entirety. The Council will hold 100% right of nomination to the properties and nomination will be agreed via Accommodation Options Group. The Council will be liable to cover the cost of any voids (i.e. empty units), however, this is considered to be a low risk because of the demand for accommodation and the properties being sourced to meet identified accommodation need. If the individuals identified are able to step down into less intensive support models the properties would be reallocated to other individuals in specialist accommodation need.

5. ALTERNATIVES CONSIDERED

- 5.1 The options considered were detailed in the SCB report of 16 December 2020 and Market Position Statement. Where approval was given to expand the portfolio of accommodation to meet existing and future needs of the population in Tameside.
- 5.2 Whilst plans for new build accommodation are in place and will be delivered in summer 2024 there is a pressing need to resettle people as soon as is practicably possible – certainly from a quality of life perspective for individuals in out of borough placements, but also in relation to delivering efficiency and savings for the Council
- 5.3 The option of seeking property via the Social Housing providers continues to be explored and all previous reports have been approved to work with RP partners to develop new housing stock for people with Adult Service needs. However, there is currently a lack of available housing to meet the immediate needs of the individuals we support. Due to this the need to explore costly out of area placements has increased meaning increased financial burden to the authority. This is further compounded by increasing care costs due to a lack of placements within the market leading to significant increases in care costs. The option to utilise the private rented sector will allow for Adult Services to meet its aspiration of supporting people to live well at home in their local communities, close to their support networks.

6. EQUALITIES

- 6.1 It is not anticipated that there are any negative equality and diversity issues with this proposal as identified in the EIA presented in the report to SCB on 16 December 2020 and in line with the Market Position Statement.

7. RISK MANAGEMENT

- 7.1 Any risks of poor service delivery will be mitigated by close monitoring of the service by close working relationships between officers representing the Council, Landlords and the RP partner to ensure that the agreements are being fully met and that subsequently people accessing the accommodation enjoy the agreed quality of accommodation. The triparty agreement will document the roles and responsibilities of each individual partner to agree expected standards and response times. The agreement will be monitored via open communication between the support provider and RP, with a bi-annual update meeting and annual property inspection.
- 7.2 There is a significant risk that not expanding the quantity of supported accommodation available for people with an eligible need to meet growing demand will mean that the Council would not fulfil its statutory and legal duty to provide support services in appropriate settings in a homely environment whilst meeting eligible needs.
- 7.3 There is a risk in the Council entering long term arrangements surrounding the properties. The justification for entering into longer term commitments on these properties is to reflect the ambition of Adult Services to source modern accommodation, either existing property built within the last ten years or totally new build schemes that meet existing and future needs alongside wherever possible offering "homes for life". Schemes such as this offer opportunities to deliver significant savings/cost avoidance and going forward operate at the optimum level of financial efficiency in supporting people with complex needs requiring 24-hour support in their own homes. The Council is clear that this very vulnerable group of people, who are increasing in numbers, will require support for the rest of their lives – the modern high-quality accommodation proposed will allow people to live in their own homes.
- 7.4 There is a financial risk to the Council in relation to covering any voids, however, this risk is mitigated by the demand for the accommodation as set out above. Adult services maintains a waiting list for individuals seeks supported accommodation via the Accommodation Options Group (AOG). When an individual is identified for a step down or change in provision AOG would ensure a nomination is presented to minimise any potential void period reducing the risk of unplanned expenditure to the Council.
- 7.5 These types of agreement also tend to give rise to a financial liability for the Council upon the happening of certain events e.g. damage to the property by an occupant where the cost of repair is not recoverable from the occupant. Such risks should be managed through close working with the providers and through support from Long Term Support.

8. CONCLUSION

- 8.1 As outlined in the Adult Services Housing and Accommodation with Support 2021-2026 report that was approved at SCB on 16 December 2020 - the demand for accommodation with support in Tameside is now outstripping supply. There are currently 55 people on the waiting list held in Adult Services by its Accommodation Options Group (AOG), and there are 16 people identified for transition in the next two years from Children's Services requiring 24 hour support who need to be planned for. In addition, the number of people with a learning disability or mental health needs living in costly out of borough places has increased recently, primarily due to the lack of supported accommodation capacity locally to meet need. There is a real concern that without increasing capacity such costly placements will very quickly become long term and the opportunity to return people to supported living in the borough at a reduced cost will be lost. The report outlined a range of accommodation schemes needed over the coming 3-5 years to meet current and future need across all adult groups.
- 8.2 The properties offered by the Private Sector Landlords are in line with the range of accommodation identified in the SCB report to meet this identified need.

- 8.3 The properties will be for the housing of a younger adults currently supported in an out of borough placement whose care package is currently costing the Council £2.307m per annum. Once the individuals are settled after a period of transition we are working towards the cost of support being reduce to realise a saving of £0.533m per annum.
- 8.4 In supporting the progression of this provisions the Council is making a strong commitment to meeting the needs of people with an eligible need by prioritising the continuation of the provision of 24 hour supported living services locally.

9. RECOMMENDATIONS

- 9.1 As set out on the front sheet.

Annex A – Estimated Savings Cost Calculations

Property	People For Consideration	Current Cost Per Week (£)	Estimated Cost per week (£)	Staff Model	Saving or Cost Avoidance (£)
3 bed house	SU 1	£8,804	£8,574	3:1 1 sleep and 1 waking night	£230 per week £11,960 per annum This would be a saving
2 bed house	SU 2	£9,016	£8,574	3:1 1 sleep and 1 waking night	£442 per week £22,984 per annum This would be cost avoidance
3 bed house	SU 3	£8,490	£3,900	1:1 1 waking night	£4,590 per week £238,680 per annum This would be a saving
2 bed house	SU 4	£10,244	£6,100	2:1 1 waking night	£4,144 per week £215,488 per annum This would be a saving
3 bed house	SU 5	£3,910	£3,900	1:1 1 Shared waking night	£10 per week £520 per annum This would be a saving
	SU 6	£3,040	£2,200	1:1 1 Shared waking night	£840 per week £43,680 per annum This would be a saving
Total Estimated Savings	£10,256 per week £0.533m per annum				

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Report to:	EXECUTIVE CABINET
Date:	25 October 2023
Executive Member:	Councillor Jacqueline North – First Deputy – Finance Resources & Transformation.
Reporting Officer:	Chris Fairbrother, Head of Estates
Subject:	FORMER ACTIVE TAMESIDE SITES – ASHTON SWIMMING POOL AND LONGDENDALE RECREATION CENTRE
Report Summary:	<p>The Council has agreed to accept a surrender of the lease of Ashton Swimming Pool and Longdendale Recreation Centre from the existing lease agreement between the Council and Active Tameside.</p> <p>As part of that approval, the report seeks Executive Cabinet approval to declare both sites surplus to Council requirements in accordance with the Council’s disposal policy, and to seek approval to demolish both existing buildings. Accordingly, this report is seeking approval to progress with the surplus declaration process together and approval to demolish both existing buildings.</p> <p>This report also addresses the petition received 22 August 2023 to save the Active Ashton Centre</p>
Recommendations:	<p>That Executive Cabinet:</p> <ol style="list-style-type: none">1. Having considered carefully the petition to save Active Ashton and other correspondence of a similar nature, the costs required to address the condition and health and safety of the pool together with ongoing revenue costs including utility costs and declare the former Ashton Swimming Pool and Longdendale Recreation Centre sites, and adjacent Council owned car park at Longdendale, as surplus to the Councils operational requirements. This is consistent with the Cabinet decision made in 20162. Approve the proposed demolition of the existing buildings on each site based on the estimated costs of £1.771m in this report.3. Approve the creation of a capital budget of £2.000m for the demolition of the existing buildings in the capital programme to cover demolitions estimates and contingency.4. Approve the use of un-earmarked reserves, noting this will reduce the available capital reserves to support risk smoothing, transformation and other Corporate Priorities and that the costs of the demolition works will need be capitalised as part of a wider programme of works to deliver enhancements to Ashton Town Centre.5. That the Council accept the Sport England funding award and administer the payment to Active Tameside subject to the Council’s S151 officer and Head of Legal Services being satisfied that the terms and conditions of the grant do not create any additional risks for the Council and noting that the grant awarded can only be used to provide revenue support

towards the utility costs at Active Copley and Active Hyde and no other venue or centre.

6. Approve the submission of a bid by the 17 October 2023 for Phase 2 funding as outlined in Section 6 to reduce future revenue costs at Denton Wellness Centre and Active Copley.

Corporate Plan:

The future use of the sites need to help contribute to delivering corporate priorities around housing, economic growth and employment.

Policy Implications:

The Council are seeking to comply with the Disposal Policy approved by Executive Cabinet in September 2020, by acting in a fair and transparent manner.

**Financial Implications:
(Authorised by the
statutory Section 151
Officer & Chief Finance
Officer)**

The Council does not have a revenue budget or a budget in the capital programme for these demolition works, estimated at a total £1.771m. There is no funding source identified with these demolition works. They can only be capitalised as part of a wider programme of works to deliver enhancements to the site.

If these are capitalised works, there are 4 options to finance the scheme:

1. Delay or stop currently proposed capital schemes and transfer the funding from these schemes to the demolition budget
2. Approve the use of unearmarked reserves, reducing the available capital reserves to support risk smoothing, transformation and other Corporate Priorities by £2.000m
3. Fund from the revenue budget, which at month 4 had underlying risks of £11m to the position and financing these works will make the use of reserves all the more likely to support the revenue budget
4. Borrow the funding from an external source such as the Public Works Loans Board as part of a wider scheme to deliver a comprehensive outcome from which the Council benefits its General Fund.

Option 1 is recommended as allocated funding not yet used can be recycled into the urgent demolitions works and future capital receipts can support the delayed schemes. Options 2-4 are detrimental to the revenue position and are not recommended.

Ashton Swimming Pool

There is no existing revenue budget for Ashton Pool. The lease agreement with Active Tameside requires that all running costs, internal repairs and maintenance are met by Active Tameside. Termination of this facility in the lease will result in the Council taking on responsibility for Business Rates of £0.051m per annum and any costs associated with security, maintenance and ensuring the building is safe. A condition survey undertaken in 2021 identified £0.610m backlog maintenance costs and the building condition has significantly deteriorated since then as the building is now outside its normal lifespan.

Due to the condition and estimated backlog maintenance on the building, continued operation of the site is not considered to be financially viable. Demolition and disposal of the site is therefore

being considered. The costs of demolition will result in budget pressures which will need to be funded. High-level estimates for demolition have now been received, with an estimated cost of demolition of £0.964m, but these costs can be capitalised and financed from a future capital receipt if demolition is considered to enhance the future value of the site.

Longdendale Recreation Centre

There is a small revenue budget for Longdendale Recreation Centre which covers the cost of grounds maintenance. Budget and Actuals in 2022/23 were as follows:

Longdendale Sports Centre	
2022/23 Budget	£0.007m
2022/23 Actual Expenditure	£0.007m

The lease agreement with Active Tameside requires that all running costs, internal repairs and maintenance are met by Active Tameside. Termination of this facility in the lease will result in the Council taking on responsibility for Business Rates of £0.023m per annum and any costs associated with security, maintenance and ensuring the building is safe, a condition survey undertaken in 2021 identified a backlog maintenance liability of £0.290m.

The Council will be liable for the on-going occupational costs, for which there is no budget, and this will place a pressure on the existing revenue budget. Demolition and disposal of the site is therefore being considered, the costs of demolition will result in budget pressures which will need to be funded. High-level estimates for demolition have now been received, with an estimated cost of demolition of £0.807m but these costs can be capitalised and met from a future capital receipt if demolition is considered to enhance the future value of the site.

Please note that the demolition costs for both buildings are based upon a high-level estimate of the demolition costs of the former Denton Baths, with an allowance for inflation, contingency and an allowance for the removal of asbestos, however the final cost for each building is dependent upon intrusive surveys being undertaken, and for which it has only been possible to instruct recently. It is recommended that approval of the final costs when received, if greater than the costs estimated are delegated to the First Deputy, Cllr North, in consultation with the S151 officer.

Swimming Pool Support Fund

The Council has been successful in its bid under Phase 1 of the Swimming Pool Support Fund. The following grant has been awarded to provide revenue support towards utility costs across sites at Active Copley and Active Hyde;

Active Copley	£110,000
Active Hyde	£197,500
Total	£307,500

The funding will be transferred to Active Tameside in order to alleviate in year cost pressures in line with the intended purpose of the grant.

Work is ongoing to formulate a bid for Phase 2 funding as outlined in Section 6. This bid will be for capital investment in order to reduce future revenue costs at Denton Wellness Centre and Active Copley.

The deadline for the bid is 17 October 2023, further updates will be provided in due course.

**Legal Implications:
(Authorised by the
Borough Solicitor)**

As the tenant has now surrendered these properties the council needs to consider their future both in terms of service delivery and the council's disposals policy.

For the reasons set out in the report the proposed option is for demolition of the current buildings and the disposal of the two sites.

The council has a robust and transparent process to declare the assets surplus which has been followed. In due course further due diligence and decision making will be required as the sites are disposed of to ensure that all relevant legislation including S123 Local Government Act 1972 is fulfilled.

There is a basic requirement for planning permission to be obtained for demolition which will be managed by the project officers.

The terms of the Sports England funding are reasonable and proportionate. The project officers must ensure that they utilise the funding in accordance with the terms of the funding so as not to trigger the clawback provisions. This will be achieved by way or robust project management.

As set out in section 3 of the report the council has not only given careful consideration to the petition to save the swimming pool but in particular given careful consideration to the ongoing provision swimming lessons which has been secured.

Risk Management:


The Council's Disposal Policy ensures that a robust and transparent process is undertaken when assets are declared surplus to the Council. Moreover, the policy seeks to ensure that any disposal is carried out in a fair and transparent manner. Through compliance with the policy, it is anticipated that any risks associated with the sale of surplus land and property is mitigated.

Access to Information:

Appendix 1	Longdendale active site plan
Appendix 2:	Ashton Swimming Pool site plan
Appendix 3:	Tameside Active Swimming Pools revised schedule
Appendix 4:	Location of Active pools
Appendix 5:	EIA Ashton Active
Appendix 6:	EIA Longdendale Active

Background Information:

The background papers relating to this report can be inspected by contacting Chris Fairbrother

 Telephone: 0161 342 8355

 e-mail: chris.fairbrother@tameside.gov.uk

1. INTRODUCTION

- 1.1 In 1999, the Tameside Sports Trust was established, which operates under the trading name of Active Tameside. The Tameside Sports Trust is a registered charity contracted by the Council to operate nine sport and leisure facilities under a lease agreement and a community physical activity and wellbeing programme. An annual management fee is paid to Active Tameside to deliver public benefit and health outcomes, in keeping with its charitable objectives, with all surplus revenues retained to support its reserves policy and/or re-invested into services and facilities.
- 1.2 On 3 July 2023, Active Tameside publicly announced the closure of three sites from their existing portfolio of leisure facilities and are seeking to return these sites to the Council. The three sites affected are Ashton Swimming Pool, Longdendale Recreation Centre and the Etherow Centre. The last operating day by Active Tameside for Etherow was Friday 01 September 2023, followed closely by the Ashton and Longdendale facilities which closed on Sunday 03 September 2023. The Etherow Centre is a property, which the Council leases and a short-term arrangement has been agreed with the Etherow Trust to enable the facility to remain open to the public until a sustainable solution can be identified.
- 1.3 The Council owns the freehold interest of the Ashton Swimming Pool and Longdendale Recreation Centre sites but has no funding to continue to run the premises with the current activities. In order to provide a more attractive development opportunity for the Longdendale Recreation site, it is proposed to include the adjacent council owned car park and ancillary land identified edged red on the plan in **Appendix 1**. The Longdendale Recreation Centre is edged blue, which would otherwise remain as an unused area of land. This would not be released until practical completion of the new Hawthorn school, in September 2024, as it is currently used for the site's contractor vehicle parking.
- 1.3 This report is seeking approval to progress the surplus declaration process for both sites and also for the Council owned car park and ancillary land as identified as edged red on the plan in **Appendix 1**, and approve the demolition of both buildings, based upon the costs detailed in this report.

2. CURRENT POSITION

Ashton Swimming Pool

- 2.1 The property comprises a single storey swimming baths, which was extended in 2010. The property is situated on the southern side of Katherine Street and to the north of Water Street. The extent of the property, which is demised to Active Tameside under a lease is identified outlined in red on the attached plan in **Appendix 2**.
- 2.2 The current rateable value is £100,000, which will represent an annual rates payable liability to the Council of £51,200. The Council will become liable for the payment of the business rates after expiry of the initial 3 months relief. The property was transferred back to the Council on the 15 September 2023. In addition, there will be the costs of management, security and maintenance. The building has reached the end of its economic life, requiring significant levels of investment to keep it operational. A condition survey undertaken in 2021 which identified £0.610m of backlog maintenance was required and the building condition has significantly deteriorated since then.
- 2.3 High level estimates for demolition have now been received, with an estimated cost of demolition of £0.964m, but these costs can be capitalised and financed from a future capital receipt if demolition is considered to enhance the future value of the site.
- 2.4 The Council was notified that an application to list Ashton Leisure Centre has been submitted to Historic England in September 2023 and on the 3 October 2023 Historic England

confirmed to the Council that following their investigation, advice and recommendation that the Secretary of State has decided that it would not be listed.

Longdendale Recreation Centre

- 2.5 The property comprises two high bayed steel portal frame warehouses with part brick elevations and part cladding to upper parts and roof. The main building extends to circa 1,236 square metres which includes two main halls, a dance studio together with reception, changing rooms, office and ancillary accommodation. The extent of the property demised to Active Tameside under the existing lease, is outlined in blue on the attached plan in **Appendix 1**.

The current rateable value is £47,000, which represents an annual rates liability of c£23,000. When the property is surrendered from the lease, the Council will become liable for the business rates after expiry of the initial 3 months empty rates allowance, the property was transferred back to the Council on 15 September 2023. In addition, there will be the costs of management, security and maintenance. A condition survey undertaken in 2021 identified a backlog maintenance liability of £0.290m.

- 2.7 In terms of mitigating the empty building costs liability post-surrender, the aim is to reduce the Council's liability and maximise the value of any capital receipt, it is proposed to undertake a marketing exercise inviting offers to purchase and develop this site along with the larger adjacent council owned car park, which should prove attractive for residential development.
- 2.6 The site is located adjacent to the new Hawthorns school, currently under construction and due to complete September 2024. The Academy which will be occupying the new school has expressed an interest in the site, so they would be able to submit an offer as part of the marketing process, it is important to recognise that the Council will be seeking to mitigate its liabilities and maximise a capital receipt from the disposal
- 2.7 There is a small detached changing room adjacent to the Longdendale recreation building, which can be identified on the plan in **Appendix 1**, which is currently proposed to be refurbished for use by the teams using the new playing pitches to be constructed on the Hawthorn School site. This will now have to be reviewed in the light of the Active Longdendale closure and a separate report will be submitted to a future Executive Cabinet addressing both this and the successful outcome of the Football Foundation grant application for the two pitches, which has recently been received.
- 2.8 The demolition costs for both these buildings are a high-level estimate based upon the costs of demolishing the former Denton Baths, with an allowance for inflation and contingency, and an allowance has been made for the removal of asbestos, however, the final cost for each building is dependent upon intrusive surveys, which it has only been possible to undertake recently.

3. PETITION RECEIVED TO RECONSIDER CLOSING THE ACTIVE ASHTON SWIMMING POOL

- 3.1 A petition with 7,000 signatures was lodged with the Council on 22 August 2023, requesting the Council to consider keeping the Active Ashton Pool building open. Additionally, there have been numerous other similar correspondence seeking the same.
- 3.2 The Council has carefully considered this request as part of this report and has taken account of a number of issues before reaching its conclusion. Active Tameside's proposal to close these facilities was of course disappointing for everyone especially Active Tameside. Active are an independent, not-for-profit charity, and provide some of the best health and wellbeing services across Tameside. However, there are a number of issues, which have to be taken into account when reviewing the building's future. The Ashton leisure centre was constructed

over 50 years ago, it is highly inefficient, and with rising energy costs and inflation, was being run at a considerable financial loss to Active Tameside. As highlighted earlier in this report, the building has reached the end of its economic life, requiring significant levels of investment to keep it operational. A condition survey undertaken in 2021 identified £0.610m backlog maintenance was required and the building condition has significantly deteriorated since then. The closure of this building along with the Longdendale and Etherow centres was made to enable Active Tameside to sustain their current business model and secure the future of the whole leisure offer through the remainder of their estate.

- 3.3 The Council's finances means that it is not in a position to pay more for the services and Active have not until now been able to access any government support to deal with the excessive energy costs. With the ongoing increased running costs, and the Ashton facility being past its end of life and requiring significant investment, it is no longer feasible to keep this building open.

In considering need, it has been confirmed that all the group activities, which took place in Ashton swimming pool, such as school swimming lessons and swimming clubs are still being delivered within the Borough and have all been successfully relocated and accommodated within the four remaining Tameside Active Swimming Pools. These are detailed in the table in **Appendix 3**, and the alternative locations are identified on the plan in **Appendix 4**. All are located within 3.6 miles from Ashton Swimming Pool. These being: Active Copley, 2.8miles; Active Hyde, 3.6miles; Active Medlock, 3.4miles and the Tameside Wellness Centre (Denton), 2.7miles from Active Ashton. The Council will continue to seek assurances and clarification from Active on the clubs and school swimming lessons to ensure that they continue to be delivered and will support Active Tameside like we would any other organisation to ensure the best outcome possible for residents.

- 3.4 Consequently, the Council is unable to support the Petition received to keep Ashton Swimming Pool open as it has insufficient capital to repair and maintain in a safe condition and insufficient revenue to manage the day to day running costs.

4. DECLARING ASSETS SURPLUS TO REQUIREMENTS

- 4.1 In accordance with the Council's Corporate Policy: Disposal of Council Land (September 2020), there are three clearly defined stages of governance for the disposal of any Council owned land or buildings. These comprise (i) Executive Cabinet approval to declare an asset surplus to requirements; (ii) approval of the route to market; and (iii) approval for the proposed price and terms. This report seeks approval to progress the first stage of the process which is to seek Executive Cabinet approval to declare the two sites surplus to requirements.

- 4.2 Within the disposal policy there is a clear criteria by which an asset shall be deemed surplus to the Council's operational requirements, through application of the 'surplus test.' Under this test, an asset will be deemed surplus where:

- It makes no contribution to the delivery of the Council's services, strategic or corporate objective.
- An alternative site has been identified that would be more costs effective in delivering the Council's services, strategic or corporate objectives.
- It has no potential for strategic or regeneration/redevelopment purposes in the near future.
- It will not contribute to the provision of a suitable pattern of development; and
- It will make no contribution to protecting and enhancing the natural, built and historic environment, including making no contribution to helping biodiversity.

- 4.3 Following closure of the Active Tameside Facilities, it is considered that the proposal to declare Ashton Swimming Pool and Longdendale Recreation Centre surplus, would be consistent with the surplus criteria stipulated in the disposal policy.

5. EQUALITIES IMPACT ASSESSMENT

- 5.1 Active Tameside have completed an Equalities Impact Assessment (EIA) in relation to the closure of each site. A copy of the EIA for Ashton Leisure Centre is in **Appendix 5**, with the EIA for Longdendale Recreation Centre in **Appendix 6**.
- 5.2 There has been public concern over the closure of the Active Ashton centre, given the impact on swimming and other exercise classes. However, Tameside Active have sought to mitigate this impact by moving such classes and sessions to their other sites. It can be confirmed that all group activities, such as school swimming lessons and swimming clubs are still being delivered within the Borough and have all been successfully relocated and accommodated within the four remaining Tameside Active Swimming Pools. These are identified on the plan in **Appendix 4**, all are located within 3.6 miles from Ashton Swimming Pool, these being: Active Copley, 2.8miles; Active Hyde, 3.6miles; Active Medlock, 3.4miles and the Tameside Wellness Centre (Denton), 2.7miles from Active Ashton.
- 5.3 Aside from the facilities provided by Active Tameside, there are private sector pool facilities that are available across the area, including in Ashton (Village Hotel 25 metres), Hyde (Village Hotel 25 metres) and Stalybridge Gymetc 18 metres).
- 5.4 Tameside's public provision compares favourably to its neighbouring councils:
- In Tameside there are 5 pools operating (Ashton, Copley, Hyde, Medlock, Denton) dropping to 4 with the closure of Active Ashton.
 - Stockport have 5 pools in operation at this point in time.
 - Oldham have 5 pools in operation at this point in time.
 - Rochdale have 3 pools in operation at this point in time (Middleton, Rochdale, Heywood).
 - Bury have 3 pools in operation at this point in time (Castle, Radcliffe, Ramsbottom).
 - Trafford have 5 pools in operation at this point in time.
 - Bolton have 5 pools in operation at this point in time.
- 5.5 Additionally Active Oxford Park, Ashton is in close proximity and has sport hall and gym provision accessible to the public and groups within the community.

6. SWIMMING POOL SUPPORT FUND

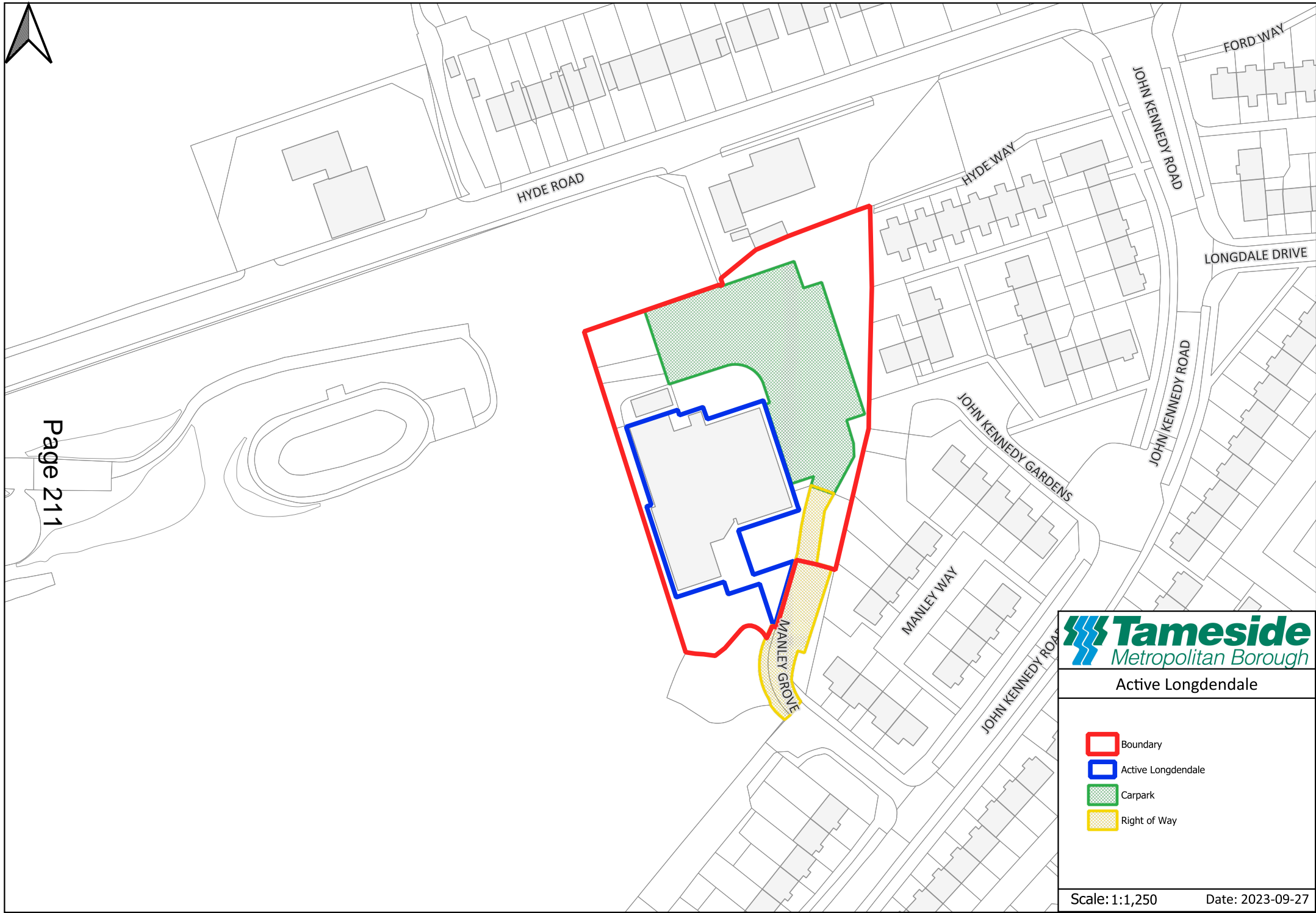
- 6.1 In the 2023 Spring Budget, the Chancellor announced the Swimming Pool Support Fund (SPSF), making available £60 million support for public swimming pool providers. The funding is to be distributed in two phases: Phase I offers £20 million to alleviate immediate cost pressures by providing revenue support. Phase II will allocate £40 million in capital investment to enhance the energy efficiency of facilities and help secure their financial stability for the future. This capital investment will be accompanied by an additional £20m of capital funding provided by Sport England to support investment in local authority swimming pools to support the reduction of operating costs and energy consumption over the medium term. The overarching purpose of the programme is to support the survival of public sector swimming pools facing increased operating costs and thereby protect the wider health outcomes, economic and lifesaving water safety benefits they provide.
- 6.2 The Phase 1 fund opened to all councils in England back in July 2023 with a maximum of £500,000 available per applicant, based on data showing the impact of rising costs. Local authorities needed to submit one application covering the publicly-accessible pools in their area. An application to the fund was submitted by the Council in August. The Council has now received notification from Sport England, the scheme administrator, that an award of £307,500 has been provisionally made to the Council to support the operational costs of Active Tameside at Active Copley and Active Hyde specifically subject to the Council's acceptance of the schemes standard terms and condition.

- 6.3 It is proposed that the Council accept the terms and conditions of Sport England award and administer the payment to Active Tameside accordingly subject to the S151 officer and the Head of Legal being satisfied there are no adverse requirements that cannot be mitigated so the Council is not left exposed to significant risks of recovery of the grant.
- 6.4 Swimming Pool Support Fund: Phase II – Capital has been opened by the government on the 7 September 2023 to the 17 October 2023 for submissions from facilities with public leisure facilities with swimming pools with increased cost pressures. Phase II will fund eligible costs relating to capital investments that reduce swimming pool facilities' energy consumption levels.
- 6.5 In addition, the 151 officer is authorised to submit a phase 2 application to Sport England for Denton Wellness Centre and Active Copley which we believe matches the criteria.





8. RECOMMENDATIONS

- 8.1 As set out at the front of the report.

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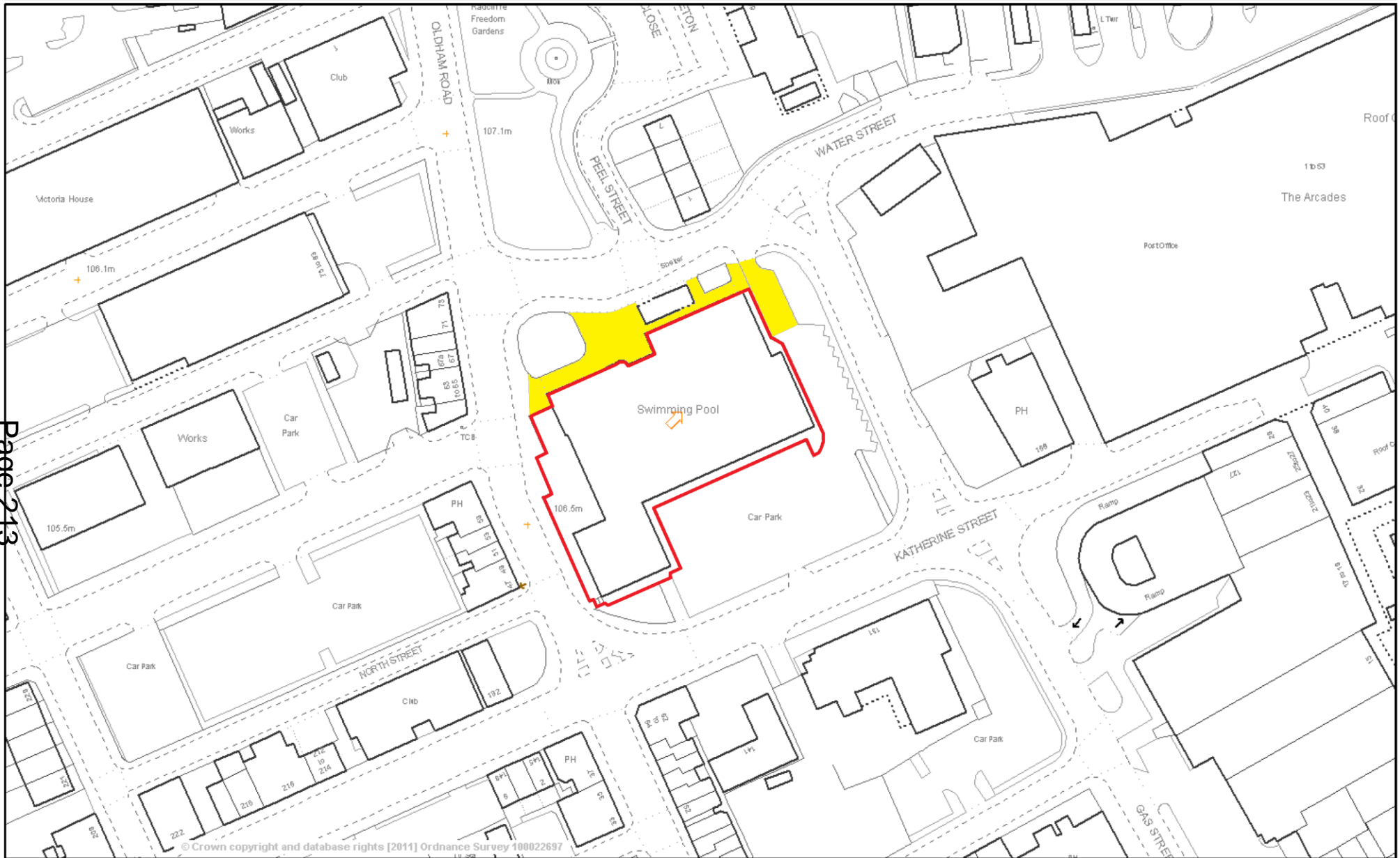


Active Longdendale

-  Boundary
-  Active Longdendale
-  Carpark
-  Right of Way

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Ashton Swimming Baths, Water Street, Ashton-under-Lyne



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Scale 1/1250

Centre = 393601 E 399140 N

Date 17/10/2022

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Ashton School Swimming 22/23

TIMES	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
9.20-10.00	Ducklings 9.00 – 9.45am Hyde same time	St Mary's Dukinfield* 36 Hyde Monday 9.20 – 10.00am	Canon Burrows* 36 Medlock Monday 9.20 – 10.00am		AWE 36 Medlock Friday 10.00 – 10.40
10.00-10.40		Holden Clough* 36 Medlock Monday 2.20 – 3.00pm	Canon Burrows* 36 Medlock Monday 10.00 – 10.40am	St James*26 Hyde Thursday 10.00 – 10.40am	AWE 36 Medlock Friday 10.40 – 11.20am
10.40-11.20	Aqua fit 11.00 – 11.45 Hyde same time	Hurst Knoll* 36 Copley Wednesday 11.20 – 12.00		St James*36 No transport HT 5&6 Hyde Thursday 10.40 – 11.20	
11.20-12.00			Aqua Fit 11.30 – 12.15 Hyde @ 11am		
1.00-1.40	Holy Trinity 36 Medlock Monday 10.40 – 11.20	Lyndhurst* 36 No transport HT 5&6 Hyde Thursday 10.00 – 10.40am	Ducklings 1.15 – 2pm	Our Lady's*36 Copley Thursday 2.20 – 3.00pm	Holden Clough* 36 POP UP POOL
1.40-2.20	Canon Johnson 36 Medlock Wednesday 1.40 – 2.20pm	Broad oak* 36 Medlock Tuesday 1.40 – 2.20pm	Adult lessons 2pm – 3.00pm Additional teacher at Hyde Wednesday am or add an additional session Wednesday evening 8/9pm	St Christopher's*36 Copley Thursday 10.00 – 10.40am	St Peters* 36 Medlock Friday 2.20 – 3.00pm but potential to ask St Stephens Droylsden to move.
2.20-3.00	Holy Trinity 36 Medlock Monday 11.20 – 12.00			Home School Groups Megan, Paula, Oonagh Hyde same day same time	

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Ladies only Sunday 2 – 5 pm sole use gym and studio, then pool from 3 – 5.00pm aqua included in ladies only 3.00 -3.45pm at Hyde Pool

Clubs Ashton Swimming Club Hyde Tue and Wed
Snorkeling moved to Medlock, same day & Time (Fri 19:30)

Staff training Medlock 5.00 – 7.15pm

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Legend

- Active Ashton,
- Active Copley, 2.8 miles from Active Ashton
- Active Hyde, 3.6 miles from Active Ashton
- Active Medlock, 3.4 miles from Active Ashton
- Tameside Wellness Centre, 2.7 miles from Active Ashton



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Subject / Title	Active Tameside – Active Ashton
------------------------	---------------------------------

Team	Department	Directorate
Active Tameside	All service areas	Reg Patel

Start Date	Completion Date
July 1 st 2023	

Project Lead Officer	Shaun Higgins
Contract / Commissioning Manager	Julian Jackson
Assistant Director/ Director	Ben Middleton

EIA Group (Lead contact first)	Job title	Service
Reg Patel/ Darren Driver	CEO / Area Manager	
Shaun Higgins	Director of health & Social outcomes	
Dan Higgins	Inclusion & Diversity Manger	
Chelsea Mear/Andy Taylor	Live Active Manager	

PART 1 – INITIAL SCREENING

An Equality Impact Assessment (EIA) is required for all formal decisions that involve changes to service delivery and/or provision. Note: all other changes – whether a formal decision or not – require consideration for an EIA.

The Initial screening is a quick and easy process which aims to identify:

- those projects, proposals and service or contract changes which require a full EIA by looking at the potential impact on, or relevance to, any of the equality groups.
- prioritise when a full EIA should be completed.
- explain and record the reasons why it is deemed a full EIA is not required.

A full EIA should always be undertaken if the project, proposal and service / contract change is likely to have an impact upon, or relevance to, people with a protected characteristic. This should be undertaken irrespective of whether the impact or relevancy is major or minor, or on a large or small group of people. If the initial screening concludes a full EIA is not required, please fully explain the reasons for this at 1e and ensure this form is signed off by the relevant Contract / Commissioning Manager and the Assistant Director / Director.

1a.	What is the project, proposal or service / contract change?	Active Tameside
1b.	What are the main aims of the project, proposal or service / contract change?	To offer an opportunity for all Tameside residents to `Live Their Best Life` Long term sustainability and affordability envelope for Active Tameside

1c. Will the project, proposal or service / contract change have either a direct or indirect impact on, or relevance to, any groups of people with protected equality characteristics? Where there is a direct or indirect impact on, or relevance to, a group of people with protected equality characteristics because of the project, proposal or service / contract change please explain why and how that group of people will be affected.

Protected Characteristic	Direct Impact/Relevance	Indirect Impact/Relevance	Little / No Impact/Relevance	Explanation
Age	Yes -transport link centrally			<u>See section 3</u>
Disability	Yes			<u>See section 3</u>
Ethnicity	Yes -demography of area that it serves			<u>See section 3</u>
Sex			No Impact	<u>See section 3</u>
Religion or Belief	Yes			<u>See section 3</u>
Sexual Orientation			No Impact	<u>See section 3</u>
Gender Reassignment			No Impact	<u>See section 3</u>
Pregnancy & Maternity	Yes			<u>See section 3</u>
Marriage & Civil Partnership			No Impact	<u>See section 3</u>

Other protected groups determined locally by Tameside Commission?

Group (Please state)	Direct Impact/Relevance	Indirect Impact/Relevance	Little / No Impact/Relevance	Explanation
Mental Health	Yes			Individuals that are not able to access facilities within their local community.
Carers	Yes			Individuals that are not able to access facilities within their local community.
Military Veterans	Yes			Individuals that are not able to access facilities within their local community.

Breast Feeding	Yes			Individuals that are not able to access facilities within their local community.
Are there any other groups who you feel may be impacted by the project, proposal or service/contract change or which it may have relevance to? (e.g., vulnerable residents, isolated residents, low-income households, those who are homeless)				
Group (Please state)	Direct Impact/Relevance	Indirect Impact/Relevance	Little / No Impact/Relevance	Explanation

Wherever a direct or indirect impact or relevance has been identified you should consider undertaking a full EIA or be able to adequately explain your reasoning for not doing so. Where little / no impact or relevance is anticipated, this can be explored in more detail when undertaking a full EIA.

1d.	Does the project, proposal or service / contract change require a full EIA?		
		Yes, with the impending closure	
1e.	What are your reasons for the decision made at 1d?	<p>The closure of Active Ashton will mean several protected characteristic groups are likely to be impact disproportionately in a negative way.</p> <p>With the present financial cost of living crisis and the current utility increase across the estate Active Tameside needed to look at the rationale across the full estate which will look at the long-term viability of an aging building to make a balanced budget.</p> <p>At no point are we looking to reduce provision or opportunity for access to all residents due to other facilities within a 2.5-mile radius.</p> <p>In parallel with the EIA Active Tameside is currently undertaking a review of concessionary pricing in partnership with TMBC for implementation September 1st, 2023.</p> <p>The report will ensure that all characteristic groups are catered for at Active Tameside Centres through considered programming.</p> <p>The following full EIA will document the evidence of the impact and the steps that can be put in place by Active Tameside to mitigate against the impacts.</p>	

If a full EIA is required, please progress to Part 2.
PART 2 – FULL EQUALITY IMPACT ASSESSMENT

2a. Summary

Active Tameside is currently undergoing a period of sustained financial pressure following the COVID 19 pandemic and recent market forces pressure including the circa 200% rise in utilities and ongoing running costs. During this time, supported by the council Active Tameside has not needed any extra funding from the council above and beyond the management fee that was agreed in 2021. It is also clear that due to the financial challenges faced by TMBC, they are not able to further support Active Tameside financially during this period.

For 23/24 we have budgeted that Active Ashton would cost circa £200,000+ annually to keep open, this is due to the fabric and age of the building which is not fit for purpose to run a modern-day leisure facility. This was highlighted in a council commissioned report where it was recommended that Active Ashton be considered for replacement as noted in the built estate strategy.

The only viable financial option is to proceed with the closure of Active Ashton, this will enable the whole business to continue to deliver a positive impact on the population of Tameside, ensuring Active Tameside remains financially viable and able to deliver services.

This will have many impacts on the local population but with other centres in the vicinity we feel we can mitigate them short term but eventually, this may have a greater impact in terms of Active lives and healthy life expectancy.

The current service that Active deliver at the centre will impact a range of groups.

Additional to this will be the potential loss of users which is mitigated by offering spaces and times for similar activities across the existing estate the effected numbers are listed below.

- 1048 current 4-10 years on learn to swim lessons.
- 16 schools accessing education swimming on site- total 500 young people per week.
- 1534 Gym Members that will have 9 months that will be able to access any other site for this period before changing their home club.
- Live Active service has 2100 active members, from these 155 clients from the OL6 postcode and 94 clients from OL7 postcode are currently active members.
- All other aquatic activity has been relocated including the women's only session on Sunday which will be the same time and day at Active Hyde (3.1 miles)

The approach to the closure in terms of redistribution of services, the various proximities to other centres etc essentially the general mitigation for everyone before we consider specific mitigation, or the various groups as identified below.

Only viable option is to proceed with the closure of Ashton this EIA will help to ensure that the most in need disadvantaged groups are able to access other facilities across the estate. Although for the local community and health and wellbeing benefits leaving Active Ashton open would have a positive impact on the community which it serves.

Travel infrastructure around Active Ashton ensure a large proportion of the user travel in by public transport and although other centres will cover activity some don't have the travel infrastructure that's is comparable to Active Ashton.

This EIA concerns the development of a new approach to Facilities & programming for Active Tameside, and this seeks to redesign and realign budget constraints, utility and cost uplifts & health and care services to provide a joined-up way of working to ensure that all services are accessible for Tameside residents and that Active Tameside continues to be an ongoing concern for the good of the local community.

With this approach Active Tameside will continue to work with key stakeholders and partners to conquer inactivity within the borough.

It is proposed that any future service model will have the following key principles at its heart and link to TMBC strategies for starting well, living well, aging well, and working well.

- Have a universal reach but focus for sections of the community and demographic areas where the needs are greatest, and health is poorest.
- Builds on the assets in communities (Leisure Centres) recognising the contribution they can make to improve health and wellbeing.
- Recognises that many people never access services and plans to provide interventions that are more acceptable and attractive to these people.
- It will be founded in good social marketing intelligence using key data and Tameside Insight.
- Include investment in environmental/ social interventions which will shape the landscape in which people are attempting to change their lifestyles.
- The offer will be tailored to individual's needs and all aspects of health and wellbeing lifestyle support will be available via simple access points.
- The approach will encompass both mental and physical health, social isolation for all Tameside residents.
- It will be linked and aligned to Tameside Neighbourhood Offer to ensure that social economic inequalities which underpin many health inequalities are able to be addressed as part of a holistic approach.
- There will be unification of services wherever possible to free up resources and ensure that local resources are utilised to maximum effect.
- It will have four key elements, a service element, stronger communities' element, mental health and wellbeing and behaviour change programme which will work synergistically to support all activities.

[Tameside Adult Activity Levels November 2019-20 | Greater Manchester Moving \(gmmoving.co.uk\)](https://www.gmmoving.co.uk)

Active Tameside can offer a reduced level of services within other facilities but because of the displacement of some of the public programming which will be due to the numbers of people that will be affected.

2b. Issues to Consider

Meeting our Equality Duty

In considering the Equality Act and the wider programme to conquer inactivity in Tameside, Active will lead to a significantly improved offer for Tameside residents with resources being directed at marginalised groups, community groups and integrated services which will provide a single point of contact for residents needing more structured support to be active, change behaviour and live their best life. This will ensure that we have a significant leisure offer across Tameside despite the rationale to reduce facilities.

Finance

The offer will predicate on the closure of Active Ashton for reason stated above.

Generic commercial pricing which will ensure long term sustainability across all Active centres.

Generic concessionary pricing scheme aligned to strategic aims of TMBC.

Demographic specific programming and pricing interventions (Asian swimming, women’s only, LGBTQ+, Looked after children, veterans)

The approach has been informed and developed by Active Tameside board in association with senior officers to identify a recovery plan to ensure sustainability of Active Tameside.

Consultation, engagement, and feedback

The approach has been informed and developed by Active Tameside and TMBC in late March 2023. Additionally, to this a consultation was not possible due to time constraints related to the forecasted savings and viability timeframe.

Tameside residents have seen an improvement over the last 10 years in levels of physical activity but also healthy life expectancy due to the work carried out in partnership with our key stakeholder in Tameside due to our diverse offer to all our population through the life course.

Demographics, please see section 3 below



Active Ashton - Floor Plans as Existing (G&S)

Appendix F - Active Ashton.pdf

Lifecycle - Active Ashton.xlsx

Maintenance Register - Active Ashton.xlsx

Section 3 – Impact

IMPACT- Impact of changes in the provision of programming for Active Tameside

For males in Tameside Life Expectancy is 75.8 and Healthy Life Expectancy is 61.6, compared to 80.5 for Life Expectancy and 58.2 for Healthy Life Expectancy for women.

Nationally these numbers are higher; male Life Expectancy and Healthy Life Expectancy are 78.7 and 63.1 respectively. Female Life Expectancy and Healthy Life Expectancy are 82.8 and 63.9 respectively.

70.3% of adults in Tameside are classified as overweight or obese (higher than the 63.5% national number); 35.95% of children in year 6 are classified as obese (higher than the 32.5% national number); and 32.4% of the population are inactive (again, higher than the 27.2% national number)

Ashton has a higher proportion of residents of Indian and Pakistani ethnic background compared to Tameside and England averages.

Tameside has a slightly older population than average, the highest proportion of residents being between 50-54, (7.19%, 16,604 residents), compared to England where the highest proportion are between 30-34 (7.0%)

Ashton-under-Lyne Age Statistic

Age Band	Proportion
4 & under	7.33%
5 - 9 years	7.23%
10 - 15 years	8.69%
16 - 19 years	4.75%
20 - 24 years	6.54%
25 - 34 years	16.08%
35 - 49 years	20.43%
50 - 64 years	16.7%
65 - 74 years	7.33%
75 - 84 years	3.84%
85 years & over	1.09%

Ashton-under-Lyne Health Statistic

7.6% Poor Health (Self-Reported) 6th Highest in Tameside, average 7.3%)

22.2% Limiting Long Term Illness or Disability [(Tameside Average =20.9%)

135 per 100,000 u75 population Under-75 CVD Mortality Rate (DSR) (9th Highest in Tameside, average = 86.4)

Residents of Ashton have a higher level self-reported poor health and limiting long term illness or disability compared to the Tameside average. Male and female life expectancy within the ward are similar to the Tameside average. Levels of diagnosed CHD and CKD are higher within Ashton Waterloo population. Premature mortality rates for males are substantially elevated within the ward, whereas those for females are lower than average.

Area	VG	G	F	B	VB
St Peter's (Tameside)	44.63%	32.63%	14.89%	5.89%	1.96%
Tameside	45.31%	33.71%	14.37%	5.12%	1.49%
Northwest	47.73%	32.71%	13.36%	4.77%	1.43%
England	48.49%	33.71%	12.65%	3.98%	1.17%

VG = Very Good, G = Good, F = Fair, B = Bad & VB = Very Bad

Source: [Census 2021 \(Nomis/ONS\)](#)



Health-Deprivation-Percentiles - Map.png

IMD-Percentiles - Map.png

Income-Deprivation-Percentiles - Map.png

ITEM 7 - THE

THE COUNCILS
SPORT AND LEISURE

Please see above detail that underlines the impact the closures will have on the community, but at this present time we are able to plan mitigation that in the short term it will have minimal impact.

Age

Older people are actively encouraged to access services and facilities through an engaging programme and pricing model.

The proactive approach to risk stratification should ensure older people, those with long term conditions, will be offered additional service. Some service provided across the portfolio of facilities are defined as being specific to older people.

Age is currently considered within the current concession pricing policy.

- 1048 current 4-10 years on learn to swim lessons.
- 16 schools accessing education swimming on site- total 500 young people per week.
- 1534 Gym Members that will have 9 months that will be able to access any other site for this period before changing their home club.
- 35 Classes with 500 attendance per week -only able to place 6 of the current classes into other centres at the same day and time slots. (Additional options and maximum occupancy will be reviewed)
- Live Active service has 2100 active members, from these 155 clients from the OL6 postcode and 94 clients from OL7 post code are currently active members.

Gender

The current services are equally accessible to both male and female users and this is born out by usage data. The service model will enable Active Tameside to identify areas of service provision that need added resources to maximise reach, input and capacity which is more equitable access for men and women.

No impact – membership and service uptake are similar across all active travel sites, there is anticipated to be no difference in gender in the uptake of the redistributed services.

Disability

In the current provision for community health development, there is an objective to engage with hard-to-reach groups such as older people; people with disabilities or additional needs; BME communities and in priority neighbourhoods such as deprived communities. People with disabilities accessing these services will be impacted in the same way as other service users. None of the services are specifically defined as being for people with disabilities however services will have suitable resources and materials adapted for people with disabilities. Due to its age and construction method Ashton cannot have key equipment installed such as a pool hoist, unlike every other pool within the estate.

Ethnicity/Race

The current provision for community services, there is an objective to engage with hard-to-reach groups such as older people; people with disabilities or additional needs; BME communities and in priority neighbourhoods such as deprived communities. The current provision provides specialist services based on

ethnicity provided by Active Tameside at specific centres (Ashton & Hyde) Both the organisation and service users have contributed to the consultation around the new & existing current service offer. This approach to reducing inequalities and focusing on supporting vulnerable groups and priority groups such as BME communities will be a key principle in any new proposals, the new Stronger Communities programme in partnership with TMBC.

Sexual orientation.

Currently all wet change facilities are village style with mixed showers and toilets, except for Active Ashton which still has specific shower and toilets facilities in wet changing room due to age of the building, however accessible changing facilities are available at this site for all genders. Sites that currently have unisex toilets include Active Medlock, Copley, Hyde and Tameside Wellness. All sites have accessible toilet and changing facilities that can be accessed by either Sex.

Marriage or civil partnership

Active Tameside is non-judgmental in terms of this characteristic and no service or activity requires this information and currently we don't ask and will not ask for in the future.

Religion/belief

Appropriate space in the new wellness centre that can act as a prayer room. We currently make a space available for all clients or staff at relevant times to enable them to follow their religious practices.

Ladies only swimming at Active Ashton will stop and will be relocated at Active Hyde.

Allow individuals to follow religious beliefs when accessing swimming and sauna in terms of dress codes (Find attached normal operating procedures for all sites) This is displayed in several languages at all reception areas.

Adaptation to suit all religions are made across all centres but at no expense to safety to individuals or others.

In terms of access at times of fasting for certain client groups we provided alternative opportunity to access facilities.

Gender reassignment.

Active Tameside has a range of facility stock that has wide ranging scope in terms of age of designs. In the latest development unisex individual WCs and cubicles have been installed to remove any concerns. Active Ashton centre has a mixture of specific changing and toilet facilities which are aging and in need of constant repair and upkeep. The older stock has accessible toilets at each site and appropriate spaces for all.

Pregnancy /Maternity

Current delivery of products and services ensure open access for all clients, including breastfeeding policy for parents at all public facilities etc.

Section 4 – Proposals & Mitigation

PROPOSALS & MITIGATION

School swimming will be moved to various sites across Tameside, but schools will need to absorb the additional cost for transport as Active Ashton has a large percentage of walking schools.

Move and play and other early years session including little ducks will be incorporated into programmes across the estate. This could impact new mums/parents that travel on public transport and thus impact on school readiness.

Transport issues – we will have signposting on the website for members who travel to Ashton currently on how they get to other sites.

Socio economic deprivation – review of Active leisure pass that will go live in September 2023

Moving of ladies' swim to Active Hyde on the same day but the impact will be the travel to Hyde which is around 3.1 miles.

Disability – redistribution of Live Active 200+ members which will be impacted by travel across the borough to other centres.

As much as we can mitigate against many of the impact we will recommending to commissioner a strategic built estate review as Ashton has one of the most deprived and ethnically diverse communities in Tameside which would benefit from Active Tameside services in the heart of the community.

We will monitor impact of closure taking into consideration inequalities groups to ensure the closure is not felt more by one group – This will be done through the outcome's framework.

Active Tameside is to provide support to people to live their best life by addressing the factors that influence their health & wellbeing enabling them to be independent and resilient and support both themselves and people around them.

This will run alongside Active Tameside main offer that maximises the three key revenues streams of health & Fitness, swimming, and Gymnastics memberships.

Below is our strategy (2019, Tameside wellness centre) which will be affected by the closure in the short, medium, and long term.

The key principle is a person centred, not programme focused approach. We also want to develop support based on a community approach, building capacity to live healthy lives by addressing the factors that influence health and wellbeing. We want to provide early intervention services that are based on staff with the skills, knowledge and confidence to support people to change and build long-term relationships with our community and change behaviour to live a more active life.

It is proposed that any future service model will have the following key principles at its heart.

- Have a universal reach but focus on the communities where the needs are greatest, and health is poorest.
- Build on the assets in communities recognising the contribution that local people can make to improve health and wellbeing.
- Recognises that many people never access services and plans to provide interventions that are more acceptable and attractive to these people.
- It will address health inequalities by incentivising service providers to actively seek out and engage with those who find it hardest to change their unhealthy lifestyles.
- It will be founded in good social marketing intelligence using JSNA and Tameside Insight.
- It will include investment in environmental/ social interventions which will shape the landscape in which people are attempting to change their lifestyles.
- The intervention mix will be tailored to individuals needs and all aspects of health and wellbeing lifestyle support will be available via simple access points.

- The approach will encompass both mental and physical health.
- It will be linked and aligned to Tameside Neighbourhood Offer to ensure that socio economic inequalities which underpin many health inequalities are able to be addressed as part of a holistic approach.
- There will be unification of services wherever possible to free up resources and ensure that local resources are utilised to maximum effect.
- Opportunities to engage voluntary sector organisations within the delivery system will be fully exploited wherever the opportunities present themselves with a clear vision to shift more resource and community delivery into the third sector.
- It will have four key elements, a service element, Stronger Communities element, Mental Health and Wellbeing and Behaviour Change programme which will work synergistically to support each other's activities.

We are therefore proposing a service model that is delivered through four commissioned work programmes:

Integrated Wellness Service giving support with healthy lifestyles.

The Service providing a range of advice, guidance and tailored support delivered in the heart of our communities. Free support will be provided around key lifestyle issues through a single point of access to improve health including:

- Health & Wellbeing
- mental wellbeing
- managing your own health and conditions
- inclusion

Everybody Can programme -All current programmes will be relocated across the estate.

A range of programmes and services that remove barriers to that ensure everyone is given a chance to reach their potential. -range of services, looking at health & wellbeing, social development and a holistic person-centred approach for young people and adults that enable all to reach their potential.

- Disability Programme - Children and young people and adults have access to a range of community and holistic programmes across Active Tameside.
- Developing a pathway from education through to Employment and volunteering opportunities for all people with a disability or additional needs in Tameside through the life course increasing wellbeing resilience.
- Providing Adult day care service that provides a varied programme of both physical activity and social interaction that empowers clients to develop a holistic overview to wellbeing and independence.
- Promotion of the 5 ways to wellbeing amongst the population and targeted groups and settings such as older people and workplaces.

Going forward the aim is to embed wellbeing promotion throughout all services captured within the Offer and ensure people of all ages understand the 5 ways to wellbeing and take up opportunities to take up 5 ways in their daily lives.

Live Active - All current programmes will be relocated across the estate.

The service aims to improve health and wellbeing by working with various members of the population with a range of health complaints.

- Consultations and planned approach to improving activity levels.
- Developing a pathway for clients that includes an introduction to activity, low level classes, social interactions and key touch points for clients.
- Providing bespoke memberships offers that make the service accessible for all & empowers clients to develop a holistic overview to wellbeing.
- Promotion of the 5 ways to wellbeing amongst the population and targeted groups and settings such as older people and workplaces.

Active Education - All current programmes will be relocated across the estate.

The service delivers to over 7000 schools' children on a weekly basis, 13 weeks of high-quality holiday provision across several Active Tameside sites.

- Early years –a range of programmes that are structured to ensure young people aged 0-5 years start well and improve school readiness in Tameside.



Safeguarding
Children Policy.pdf

Swimming programmes -All current programmes will be relocated across the estate.

- SEN classes and disability one to one lessons – for those with additional needs
- Parent and tot sessions for under 5years old - Ducklings/wally walrus session
- Little ducks for children aged 3-5
- Learn to swim for aged 4+
- Swim academy and clubs for those that have progressed through the learn to swim schemes.
- Adult lessons

Health & Fitness Memberships-All current programmes will be relocated across the estate.

- Different types of membership packages available
- Peak and off-peak packages available
- High risk clientele is given extra support through the Live Active Service
- Variety of different types of classes available throughout the day such as cardio, mind and body, and strength and conditioning.

Concessions pricing and site-specific programmes

- Continue to honour current Active+ members and concessions.
- Looked after Children offer – continue with existing offer to cared for children -700 young people in the borough.



leisure pass
2023.docx

other document related to the impact of the facility closure.



Outcomes
framework metrics



Active Education
Strategy 18-21 (8).dc



everybody can
strategy new brandi



early years New
branding.docx



Health & Wellbeing
Strategy new brand

Section 5 – Monitoring

MONITORING PROGRESS

Julian Jackson – Director of Place – commissioner

This is done via Active Tameside outcomes framework and quarterly reports and performance meetings.

Issue / Action	Lead officer	Timescale
Required	Required	Required
Ensuring equitable access to services		Quarterly
Ensuring positive outcomes are maintained.		Quarterly
Any negative equalities impact of the proposal is continuously identified throughout the procurement and contract period – any negative impacts are identified, and appropriate action is taken to address these.		Ongoing

Signature of Contract / Commissioning Manager	Date
Signature of Assistant Director / Director	Date

Guidance below to be removed from the completed EIA template submitted to Executive Board, Executive Cabinet or Strategic Commissioning Board (SCB)

1c. Will the project, proposal or service / contract change have either a direct or indirect impact on, or relevance to, any groups of people with protected equality characteristics? Where there is a direct or indirect impact on, or relevance to, a group of people with protected equality characteristics because of the project, proposal or service / contract change please explain why and how that group of people will be affected.				
Protected Characteristic	Direct Impact/Relevance	Indirect Impact/Relevance	Little / No Impact/Relevance	Explanation
Age	✓			Ashton has a higher of older people that travel in on public transport to the centre
Disability		✓		Some users may be disabled but will have opportunity to attend other centres.
Ethnicity		✓		users come from a range of ethnic backgrounds within the locality.

Sex		✓		Active centres aren't sex specific
Religion or Belief		✓		Ashton has a diverse user group and looking at the local demography this will impact.
Sexual Orientation			✓	
Gender Reassignment			✓	
Pregnancy & Maternity			✓	
Marriage & Civil Partnership			✓	
NHS Tameside & Glossop Clinical Commissioning Group locally determined protected groups?				
Mental Health	✓			Physical activity is good for individuals who suffer from mental health
Carers		✓		
Military Veterans		✓		
Breast Feeding		✓		provide services to pregnant women and new mothers
Are there any other groups who you feel may be impacted by the project, proposal or service/contract change or which it may have relevance to? (e.g., vulnerable residents, isolated residents, low-income households, those who are homeless)				
Group (Please state)	Direct Impact/Relevance	Indirect Impact/Relevance	Little / No Impact/Relevance	Explanation
Lone Parents		✓		users may include lone parents
Disadvantaged families	✓			support the most disadvantaged families, with an aim to reduce inequalities in child development and school readiness.

Subject / Title	Active Tameside – Adventure Longdendale
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Team	Department	Directorate
Active Tameside	All service areas	Reg Patel

Start Date	Completion Date
July 1 st 2023	

Project Lead Officer	Shaun Higgins
Contract / Commissioning Manager	Julian Jackson
Assistant Director/ Director	Ben Middleton

EIA Group (Lead contact first)	Job title	Service
Reg Patel / Ian foden	CEO / Area Manager	
Shaun Higgins	Director of health & Social outcomes	
Dan Higgins	Inclusion & Diversity Manager	
Chelsea Mear/Andy Taylor	Live Active Manager	

PART 1 – INITIAL SCREENING

An Equality Impact Assessment (EIA) is required for all formal decisions that involve changes to service delivery and/or provision. Note: all other changes – whether a formal decision or not – require consideration for an EIA.

The Initial screening is a quick and easy process which aims to identify:

- *those projects, proposals and service or contract changes which require a full EIA by looking at the potential impact on, or relevance to, any of the equality groups.*
- *prioritise if and when a full EIA should be completed.*
- *explain and record the reasons why it is deemed a full EIA is not required.*

A full EIA should always be undertaken if the project, proposal and service / contract change is likely to have an impact upon, or relevance to, people with a protected characteristic. This should be undertaken irrespective of whether the impact or relevancy is major or minor, or on a large or small group of people. If the initial screening concludes a full EIA is not required, please fully explain the reasons for this at 1e and ensure this form is signed off by the relevant Contract / Commissioning Manager and the Assistant Director / Director.

1a.	What is the project, proposal or service / contract change?	Active Tameside
1b.	What are the main aims of the project, proposal or service / contract change?	To offer an opportunity for all Tameside residents to Live Their Best Life

1c. Will the project, proposal or service / contract change have either a direct or indirect impact on, or relevance to, any groups of people with protected equality characteristics?
Where there is a direct or indirect impact on, or relevance to, a group of people with protected equality characteristics as a result of the project, proposal or service / contract change please explain why and how that group of people will be affected.

Protected Characteristic	Direct Impact/Relevance	Indirect Impact/Relevance	Little / No Impact/Relevance	Explanation
Age	Yes -			This will impact on families and young children accessing the centre
Disability	yes			<u>See section 3</u>
Ethnicity	Yes			<u>See section 3</u>
Sex				<u>See section 3</u>
Religion or Belief	Yes			<u>See section 3</u>
Sexual Orientation				<u>See section 3</u>
Gender Reassignment				<u>See section 3</u>
Pregnancy & Maternity	Yes			Early years and soft play area
Marriage & Civil Partnership				<u>See section 3</u>

Other protected groups determined locally by Tameside and Glossop Strategic Commission?

Group (Please state)	Direct Impact/Relevance	Indirect Impact/Relevance	Little / No Impact/Relevance	Explanation
Mental Health	Yes			Individuals that are not able to access facilities within their local community.
Carers	Yes			Individuals that are not able to access facilities within their local community.
Military Veterans	Yes			Individuals that are not able to access facilities within their

				local community.
Breast Feeding	<u>yes</u>			Individuals that are not able to access facilities within their local community.
Are there any other groups who you feel may be impacted by the project, proposal or service/contract change or which it may have relevance to? (e.g., <i>vulnerable residents, isolated residents, low-income households, those who are homeless</i>)				
Group (Please state)	Direct Impact/Relevance	Indirect Impact/Relevance	Little / No Impact/Relevance	Explanation

Wherever a direct or indirect impact or relevance has been identified you should consider undertaking a full EIA or be able to adequately explain your reasoning for not doing so. Where little / no impact or relevance is anticipated, this can be explored in more detail when undertaking a full EIA.

1d.	Does the project, proposal or service / contract change require a full EIA?		
		Yes, with the impending closure	

<p>1e.</p> <p>What are your reasons for the decision made at 1d?</p>		<p>The closure of Adventure Longdendale will mean several protected characteristic groups are likely to be impacted disproportionately in a negative way.</p> <p>With the present financial cost of living crisis and the current utility increase across the estate Active Tameside needed to the look at the rationale across the full estate and decide to look at the long-term viability of an aging building to make a balanced budget.</p> <p>Current level of spend on repairs is circa £10k per year and back log other repairs that are essential to keep the building up to a standard.</p> <p>At no point are we able to relocate the service and the nearest trampoline centre is Oldham. Active can look to accommodate the Early years and youth offer due to other facilities within a 1.0 mile radius. (Active Ken Ward)</p> <p>In parallel with the EIA Active Tameside is currently undertaking a review of concessionary pricing in partnership with TMBC for implementation September 2023.</p> <p>The report will ensure that all characteristic groups are catered for at Active Tameside Centres through considered programming. This programme is</p> <ul style="list-style-type: none"> • Monday – Friday – Adult social care term time & Holidays • Friday – Sunday = public opening -trampoline, laser and soft play including parties. • Friday – Access all areas Youth session on • Fuel4fun Holiday activities • Schools – accessing all areas. • Thursday – Sunday = public opening for the Holiday times (Thursday & Friday from 12pm) <p>A full EIA will underpin specific initiatives.</p>

If a full EIA is required, please progress to Part 2.

PART 2 – FULL EQUALITY IMPACT ASSESSMENT

2a. Summary

Active Tameside is currently undergoing a period of sustained financial pressure following the COVID 19 pandemic and recent market forces pressure including the circa 200% rise in utilities and ongoing running costs. During this time, supported by the council Active Tameside has not needed any extra funding from the council above and beyond the management fee that was agreed in 2021. It is also clear that due to the financial challenges faced by the council they are not in a position to further support Active Tameside financially during this period.

For 23/24 we have budgeted that Adventure Longdendale would cost circa £108,000+ annually to keep open, this is due to the fabric and age of the building which is ageing and incomparable to a modern-day leisure facility.

This will have many impacts on the local population but with other centres in the vicinity we feel we can mitigate them short term but eventually, this may have a greater impact in terms of Active lives and healthy life expectancy.

The current service that Active deliver at the centre will impact a range of groups.

Additional to this will be the potential loss of users which is mitigated by offering spaces and times for similar activities across the existing estate the effected numbers are listed below

- Monday – Friday – Adult social care term time & Holidays
- Friday – Sunday = public opening -trampoline, laser and soft play including parties.
- Friday – Access all areas Youth session on
- Fuel4fun Holiday activities
- Schools – accessing all areas.
- Thursday – Sunday = public opening for the Holiday times (Thursday & Friday from 12pm)

The approach to the closure in terms of redistribution of services, the various proximities to other centres etc essentially the general mitigation for everyone before we consider specific mitigation, or the various groups as identified.

Only viable option is to proceed with the closure of Adventure Longdendale this EIA will help to ensure that the most in need disadvantaged groups are able to access other facilities across the estate. Although for the local community and health and wellbeing benefits leaving Adventure Longdendale open would have a positive impact on the community which it serves.

Travel infrastructure around Adventure Longdendale is limited for the users to travel in by public transport

This EIA concerns the development of a new approach to Facilities & programming for Active Tameside and this seeks to redesign and realign budget constraints, utility and cost uplifts & health and care services to provide a joined up way of working to ensure that all services are accessible for Tameside residents and that Active Tameside continues to be an ongoing concern for the good of the local community.

With this approach Active Tameside will continue to work with key stakeholders and partners to conquer inactivity within the borough.

It is proposed that any future service model will have the following key principles at its heart and link to TMBC strategies for starting well, living well, aging well, and working well.

- Have a universal reach but focus for sections of the community and demographic areas where the needs are greatest, and health is poorest.
- Builds on the assets in communities (Leisure Centres) recognising the contribution they can make to improve health and wellbeing.
- Recognises that many people never access services and plans to provide interventions that are more acceptable and attractive to these people.
- It will be founded in good social marketing intelligence using key data and Tameside Insight.
- Include investment in environmental/ social interventions which will shape the landscape in which people are attempting to change their lifestyles.
- The offer will be tailored to individual's needs and all aspects of health and wellbeing lifestyle support will be available via simple access points.
- The approach will encompass both mental and physical health, social isolation for all Tameside residents.
- It will be linked and aligned to Tameside Neighbourhood Offer to ensure that social economic inequalities which underpin many health inequalities are able to be addressed as part of a holistic approach.
- There will be unification of services wherever possible to free up resources and ensure that local resources are utilised to maximum effect.
- It will have four key elements, a service element, stronger communities' element, mental health and wellbeing and behaviour change programme which will work synergistically to support all activities.

The key change to the offer will be a significant shift in resources to local demographic and areas of deprivation in Tameside. The vision for future will enable the most in need client groups access to a range of services and centres at reduced rates thereby improving individual and community resilience and wellbeing for all. This would therefore support effective, accessible, and responsive health improvement opportunities throughout the life course and across all settings.

At a local level the current model doesn't meet the aspirations of Active Tameside with regards to the best life dynamic. Additional to this all-new programming will link to the relevant information released from Greater sport. (Below)



Tameside Active
Lives.csv

Active Tameside cannot offer the same range of services within other facilities due to the specifics of the services delivered on site. i.e trampolining park and laser arena. Soft play can be absorbed into the remaining soft play centre's,

2b. Issues to Consider

Meeting our Equality Duty

In considering the Equality Act and the wider programme to conquer inactivity in Tameside, Active will lead to a significantly improved offer for Tameside residents with more resources being directed at marginalised groups, community groups and integrated services which will provide a single point of contact for residents needing more structured support to be active, change behaviour and live their best life. This will ensure that we have a significant leisure offer across Tameside despite the rationale to reduce facilities.

Finance

The offer will predicate on the closure of Adventure Longendale for reason stated above.

Generic commercial pricing which will ensure long term sustainability across all Active centres.

Generic concessionary pricing scheme aligned to strategic aims of TMBC.

Demographic specific programming and pricing interventions.

The approach has been informed and developed by Active Tameside board in association with senior officers to identify a recovery plan to ensure sustainability of Active Tameside.

Additional to this will be the potential loss of users which is mitigated by offering spaces and times for similar activities across the existing estate the effected numbers are listed below.

- 80 youth each week tackling ASB per week.
- 120 Disabled adult users for social care and day services.
- 80 Disabled children's accessing weekly session specifically
- 180 accessing soft play that are Early years.
- 320 Accessing trampoline/Laser across all ages ranges.

Consultation, engagement, and feedback

The approach has been informed and developed by the Active Tameside

Additional to this a consultation was not possible due to time constraints related to forecasted savings and viability.



Active Longendale
Floor Plans.pdf



Appendix F -
Longendale Recreatio



Longendale -
Lifecycle.xlsx



Maintenance Register
- Longdale Recreation

Section 3 – Impact

IMPACT- Impact of changes in the provision of programming for Active Tameside

For males in Tameside Life Expectancy is 75.8 and Healthy Life Expectancy is 61.6, compared to 80.5 for Life Expectancy and 58.2 for Healthy Life Expectancy for women.

Nationally these numbers are higher; male Life Expectancy and Healthy Life Expectancy are 78.7 and 63.1 respectively. Female Life Expectancy and Healthy Life Expectancy are 82.8 and 63.9 respectively.

70.3% of adults in Tameside are classified as overweight or obese (higher than the 63.5% national number); 35.95% of children in year 6 are classified as obese (higher than the 32.5% national number); and 32.4% of the population are inactive (again, higher than the 27.2% national number)

Tameside has a slightly older population than average, the highest proportion of residents being between 50-54, (7.19%, 16,604 residents), compared to England where the highest proportion are between 30-34 (7.0%)

Longdendale Health Statistic

8.6% Poor Health (Self-Reported) 3rd Highest in Tameside, average 7.3%)

23.0% Limiting Long Term Illness or Disability (Tameside Average =20.9%)

149.1 per 100,000 u75 population Under-75 CVD Mortality Rate (DSR) (4th Highest in Tameside, average = 86.4)

Longdendale has the third highest level of self-reported poor health and limiting long term illness or disability out of all Tameside wards. Despite this however, life expectancy for both male and females within Longdendale is the 5th highest out of all Tameside wards and overall premature mortality rates are considerably lower than the Tameside average within the ward. However, the under-75 CVD mortality rate in Longdendale is 75% higher than the Tameside average. The diagnosed prevalence of CHD, stroke, diabetes, asthma, Heart Failure, Atrial Fibrillation and Peripheral Arterial Disease (PAD) are higher than the Tameside average

Population

9,950 Longdendale Population (-13.9% Since 2001) (Tameside Population +2.9% Since 2001)

49.2% Male Population 4,893 (Tameside Male Population 49.1%)

50.8% Female Population 5,057 (Tameside Female Population 50.9%)



Health-Deprivation-Percentiles - Map.png



IMD-Percentiles - Map.png



Income-Deprivation-Percentiles - Map.png



ITEM 7 - THE



THE COUNCILS

COUNCILS SPORT AND LEISURE

Please above detail that underlines the impact closure will have on the community but at this present time we are able to plan mitigation that short term only will have no impact.

Age

Older people are activity encouraged to access services and facilities through an engaging programme and pricing model.

The proactive approach to risk stratification should ensure older people, in particular those with long term conditions, will be offered additional service. Some service provided across the portfolio of facilities are defined as being specific to older people.

Age is currently considered within the current concession pricing policy.

Gender

The current services are equally accessible to both male and female users and this is born out by usage data. The service model will enable Active Tameside to identify areas of service provision that need added resources to maximise reach, input and capacity which is more equitable access for men and women.

Disability

In the current provision for community health development, there is an objective to engage with hard-to-reach groups such as older people; people with disabilities or additional needs; BME communities and in priority neighbourhoods such as deprived communities. People with disabilities accessing these services will be impacted in the same way as other service users. None of the services are specifically defined as being for people with disabilities however services will have suitable resources and materials adapted for people with disabilities.

Ethnicity/Race

The current provision for community services, there is an objective to engage with hard-to-reach groups such as older people; people with disabilities or additional needs; BME communities and in priority neighbourhoods such as deprived communities. The current provision provides specialist services based on ethnicity provided by Active Tameside at specific centres (Ashton & Hyde) Both the organisation and service users have contributed to the consultation around the new & existing current service offer. This approach to reducing inequalities and focusing on supporting vulnerable groups and priority groups such as BME communities will be a key principle in any new proposals, in particular the new Stronger Communities programme in partnership with TMBC.

Sexual orientation.

Currently all WC facilities on site are single sex, however accessible changing facilities are available at this site for all genders. Sites that currently have unisex toilets include Active Medlock, Copley, Hyde and Tameside Wellness. All sites have accessible toilet and changing facilities that can be accessed by either Sex.

Marriage or civil partnership

Active Tameside is non-judgmental in terms of this characteristic and no service or activity requires this information and currently we don't ask and will not ask for in the future.

Religion/belief

Appropriate space in the new wellness centre that can act as a prayer room. We currently make a space available for all clients and staff at relevant times enable them to follow their religious practices.

Adaptation to suit all religions are made across all centres but at no expense to safety to individuals or others.

In terms of access at times of fasting for certain client groups we provided alternative opportunism to access facilities.

Gender reassignment.

Active Tameside has a range of facility stock that has wide ranging scope in terms of age from Tameside residents.

Pregnancy /Maternity

Current delivery of products and services ensure open access for all clients, including breastfeeding policy for parents at all public facilities etc.

Section 4 – Proposals & Mitigation

PROPOSALS & MITIGATION

As much as we can mitigate against many of the impacts we will be recommending to commissioners a strategic built estate review in Tameside which would benefit from having Active Tameside services in the heart of the community.

We will monitor impact of closure taking into consideration inequalities groups to ensure the closure is not felt more by one group – This will be done through the outcome's framework.

Active Tameside is to provide support to people to live their best life by addressing the factors that influence their health & wellbeing enabling them to be independent and resilient and support both themselves and people around them.

This will run alongside Active Tameside main offer that maximises the three key revenues streams of health & Fitness, swimming, and Gymnastics memberships.

We aim to migrate most daytime activities to Oxford Park and the attractions activities into our other attraction offers across our estate.

Below is our strategy (2019, Tameside wellness centre) which will be affected by the closure in the short, medium, and long term.

Active Tameside is to provide support to people to live their best life by addressing the factors that influence their health & wellbeing enabling them to be independent and resilient and support both themselves and people around them.

This will run alongside Active Tameside main offer that maximises the three key revenues streams of health & Fitness, swimming, and Gymnastics memberships.

The key principle is a person centred, not programme focused approach. We also want to develop support based on a community approach, building capacity to live healthy lives by addressing the factors that influence health and wellbeing. We want to provide early intervention services that are based on staff with the skills, knowledge and confidence to support people to change and build long-term relationships with our community and change behaviour to live a more active life.

It is proposed that any future service model will have the following key principles at its heart.

- Have a universal reach but focus on the communities where the needs are greatest, and health is poorest.
- Builds on the assets in communities recognising the contribution that local people can make to improve health and wellbeing.
- Recognises that many people never access services and plans to provide interventions that are more acceptable and attractive to these people.
- It will address health inequalities by incentivising service providers to actively seek out and engage with those who find it hardest to change their unhealthy lifestyles.
- It will be founded in good social marketing intelligence using JSNA and Tameside Insight.
- It will include investment in environmental/ social interventions which will shape the landscape in which people are attempting to change their lifestyles.
- The intervention mix will be tailored to individuals needs and all aspects of health and wellbeing lifestyle support will be available via simple access points.
- The approach will encompass both mental and physical health.
- It will be linked and aligned to Tameside Neighbourhood Offer to ensure that socio economic inequalities which underpin many health inequalities are able to be addressed as part of a holistic approach.
- There will be unification of services wherever possible to free up resources and ensure that local resources are utilised to maximum effect.
- Opportunities to engage voluntary sector organisations within the delivery system will be fully exploited wherever the opportunities present themselves with a clear vision to shift more resource and community delivery into the third sector.
- It will have four key elements, a service element, Stronger Communities element, Mental Health and Wellbeing and Behaviour Change programme which will work synergistically to support each other's activities.

We are therefore proposing a service model that is delivered through four commissioned work programmes:

Integrated Wellness Service giving support with healthy lifestyles.

The Service providing a range of advice, guidance and tailored support delivered in the heart of our communities. Free support will be provided around key lifestyle issues through a single point of access to improve health including:

- Health & Wellbeing
- mental wellbeing
- managing your own health and conditions
- inclusion

Everybody Can programme -All current programmes will be relocated across the estate.

A range of programmes and services that remove barriers to that ensure everyone is given a chance to reach their potential. -range of services, looking at health & wellbeing, social development and a holistic person-centred approach for young people and adults that enable all to reach their potential.

- **Disability Programme** - Children and young people and adults have access to a range of community and holistic programmes across Active Tameside

- Developing a pathway from education through to Employment and volunteering opportunities for all people with a disability or additional needs in Tameside through the life course increasing wellbeing resilience.
- Providing Adult day care service that provides a varied programme of both physical activity and social interaction that empowers clients to develop a holistic overview to wellbeing and independence.
- Promotion of the 5 ways to wellbeing amongst the population and targeted groups and settings such as older people and workplaces.

Going forward the aim is to embed wellbeing promotion throughout all services captured within the Offer and ensure people of all ages understand the 5 ways to wellbeing and take up opportunities to take up 5 ways in their daily lives.

Live Active - All current programmes will be relocated across the estate.

The service aims to improve health and wellbeing by working with various members of the population with a range of health complaints.

- Consultations and planned approach to improving activity levels.
- Developing a pathway for clients that includes an introduction to activity, low levels classes, social interactions and key touch points for clients.
- Providing bespoke memberships offers that make the service accessible for all & empowers clients to develop a holistic overview to wellbeing.
- Promotion of the 5 ways to wellbeing amongst the population and targeted groups and settings such as older people and workplaces.
- Early years –a range of programmes that are structured to ensure young people aged 0-5 years start well and improve school readiness in Tameside.

Concessions pricing and site-specific programmes

- Continue to honour current Active+ members and concessions.
- Looked after Children offer – continue to offer LAC offer for 700 young people in the borough.



leisure pass
2023.docx

other document related to the impact of the facility closure.



Outcomes
framework metrics



Active Education
2Strategy 18-21 (8).dc



everybody can
strategy new brandi



early years New
branding.docx



Health & Wellbeing
Strategy new brand

Section 5 – Monitoring

MONITORING PROGRESS

Julian Jackson – Director of Place – commissioner

This done via Active Tameside outcomes framework and quarterly reports and performance meetings.

Issue / Action	Lead officer	Timescale
<i>Required</i>	<i>Required</i>	<i>Required</i>
Ensuring equitable access to services		Quarterly
Ensuring positive outcomes are maintained.		Quarterly
Any negative equalities impact of the proposal is continuously identified throughout the procurement and contract period – any negative impacts are identified, and appropriate action is taken to address these.		Ongoing

Signature of Contract / Commissioning Manager	Date
Signature of Assistant Director / Director	Date

Guidance below to be removed from the completed EIA template submitted to Executive Board, Executive Cabinet or Strategic Commissioning Board (SCB)

1c. Will the project, proposal or service / contract change have either a direct or indirect impact on, or relevance to, any groups of people with protected equality characteristics? Where there is a direct or indirect impact on, or relevance to, a group of people with protected equality characteristics as a result of the project, proposal or service / contract change please explain why and how that group of people will be affected.				
Protected Characteristic	Direct Impact/Relevance	Indirect Impact/Relevance	Little / No Impact/Relevance	Explanation
Age	✓			Adventure Longdendale has families and children who attend the centre
Disability		✓		Some users may be disabled but will have opportunity to attend other centres.
Ethnicity		✓		users come from a range of ethnic backgrounds within the locality.

Sex		✓		Active centres aren't sex specific
Religion or Belief			✓	
Sexual Orientation			✓	
Gender Reassignment			✓	
Pregnancy & Maternity	✓			Early Year Sessions
Marriage & Civil Partnership			✓	
NHS Tameside & Glossop Clinical Commissioning Group locally determined protected groups?				
Mental Health			✓	
Carers		✓		
Military Veterans			✓	
Breast Feeding	✓			provide services to pregnant women and new mothers
Are there any other groups who you feel may be impacted by the project, proposal or service/contract change or which it may have relevance to? (e.g., <i>vulnerable residents, isolated residents, low-income households, those who are homeless</i>)				
Group (Please state)	Direct Impact/Relevance	Indirect Impact/Relevance	Little / No Impact/Relevance	Explanation
Lone Parents		✓		users may include lone parents
Disadvantaged families	✓			support the most disadvantaged families, with an aim to reduce inequalities in child development and school readiness.

Report to:	EXECUTIVE CABINET
Date:	25 October 2023
Executive Member:	Councillor Jacqueline North, First Deputy – Finance Resources & Transformation.
Reporting Officer:	Ben Middleton, Assistant Director of Strategic Property
Subject:	LAND AT GRAFTON STREET, HYDE – DISPOSAL
Report Summary:	<p>The above land is not required for operational or investment purposes and can be considered surplus to the requirements of the Council. Consequently, the land would be available for sale to generate a capital receipt for the Council. An enquiry has been received from an interested party seeking to acquire the freehold interest in the four plots of land identified on the plan in Appendix 1 and provisionally agreed Heads of terms are reported in confidential Appendix 2.</p> <p>This report is seeking Executive Cabinet’s approval to declare the sites surplus to Council’s requirements and to approve the provisionally agreed terms of disposal.</p>
Recommendations:	<ol style="list-style-type: none">1. To declare the four plots of land outlined on the plan attached (Appendix 1) surplus to the requirements of the Council and available for disposal.2. To approve the disposal of the four plots of land detailed in Appendix 1, on the terms provisionally agreed subject to them being in line with the independent Red Book valuation.
Corporate Plan:	The sale of the sites covered in this report, would help contribute to delivering corporate priorities around economic growth and employment.
Policy Implications:	The Council are seeking to comply with the Disposal Policy approved by Executive Cabinet in September 2020, by acting in a fair and transparent manner.
Financial Implications: (Authorised by the statutory Section 151 Officer & Chief Finance Officer)	<p>The report sets out details for the Council’s proposal to dispose of land at Grafton Street, Hyde. The land is currently surplus to the requirements of the Council. A capital receipt, including professional fees, as detailed in appendix 2 would be received by the Council on completing the disposal. The disposal price will be supported by an independent external RICS “red book” valuation as required by valuation protocols.</p> <p>The value of a capital receipt received in any financial year if less than £10,000 per asset will be allocated to the Council’s revenue budget. Any capital receipt that exceeds this de-minimus value will be a corporate receipt to support the funding of the Council’s capital programme. If this site is sold at or above the minimum reserve price, this will be a capital receipt to support the capital programme.</p> <p>A critical source of funding required to finance the Council’s Capital Programme is capital receipts from the sale or disposal of Council owned land and buildings. Other sources of finance</p>

available include Government grants, borrowing (that requires repayment via existing revenue budgets), capital reserves and revenue financing (although due to increasing pressures on revenue budgets, this is no longer viable in many cases).

The current capital programme includes £22million of schemes which will need to be funded from Capital Receipts and existing Capital Reserves. The anticipated level of capital receipts is based on the disposal of surplus assets.

**Legal Implications:
(Authorised by the
Borough Solicitor)**

The report seeks approval to declare the sites surplus and approve terms for the disposal in order to receive a 'windfall' capital receipt. The Council will not advertise the plots for sale on the open market, given that the third party are a 'special purchaser', seeking to deliver a comprehensive development on the combined plots of land. The disposal price will be underpinned by an independent RICS Red Book compliant valuation in order to demonstrate Best Consideration, and compliance with s123 of the Local Government Act 1972.

Risk Management:

If a sale does not proceed the Council would retain the sites' maintenance and management liabilities, the proposed sale minimises this risk.

Access to Information:

CONFIDENTIAL

APPENDIX 2: Contains exempt information relating to paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 (as amended) in that it relates to information relating to the financial or business affairs of a particular person (including the authority holding that information).

Background Information:

The background papers relating to this report can be inspected by contacting Ben Middleton, Assistant Director, Strategic Property, Place.

Telephone: 0161 301 2950

Email: ben.middleton@tameside.gov.uk

1. INTRODUCTION

- 1.1 The Council owns four plots of land that previously formed part of a larger area used to support a series of highway schemes. Following completion of the schemes, the Council has retained the surplus plots, shown edged red on the attached plan (**Appendix 1**). These areas are now maintenance liabilities with potential costs but do not generate any revenue.
- 1.2 Plot 1, measures approximately 45 square metres, and has in the last few years, been landscaped by the owners of the adjoining site to form an attractive area of hard landscaping. More recently, signage has been introduced onto the land, which represents an encroachment which will be resolved by the proposed disposal.
- 1.3 Plots 2 and 3 are two areas of naturalised land, which wrap around the former residential properties known as 54-58 Clarendon Street that were acquired and demolished by a third party (possibly the Highways Agency) approximately 20 years ago. The Council land is largely indistinguishable from the third party owned land and the two plots measure 28 square metres and 102 square metres respectively.
- 1.4 Plot 4 is also an area of landscaped land that is largely naturalised, with several unmaintained trees covering the site. The land appears to have been in this state, for a number of years although, judging from a wall that wraps around part of the property, the land was previously developed as a building or yard area, perhaps prior to the construction of the nearby M67. This site is approximately 450 square metres.

2. CURRENT POSITION

- 2.1 The Council have been approached by an agent acting on behalf of a fast food restaurant and take away provider, who have agreed terms to acquire the freehold and leasehold interests from the freehold owner of the adjacent site who was seeking to sell the site as a redevelopment opportunity. The Council's Grafton St plots are of interest to a fast food restaurant and take away provider, who are ideally seeking to develop a 'Drive Thru' restaurant on the combined sites have advised that they require the the adjoining plots owned by the Council in order to develop a 'Drive Thru' restaurant.
- 2.2 Following this initial approach, and given the fact that, in isolation and in the absence of any comprehensive redevelopment proposals for the Council land, this report is seeking approval to declare the four plots owned by the Council surplus to requirements and seeking approval to a disposal of the freehold interests to the fast food restaurant and take away provider, which will be conditional upon planning permission being granted to construct a 'Drive Thru'.
- 2.3 The fast food restaurant and take away provider have agreed terms to purchase the four plots of land, for the council's interests. The offer is subject to contract, council approval, planning permission and the purchase of the freehold and leasehold interests of the adjacent site. The fast food restaurant and take away provider will require 18 months from exchange of contracts to obtain planning permission for the 'Drive Thru', with a 'long stop' date of 36 months from exchange of contracts if the planning application is subject to a Planning Appeal.
- 2.4 This approach would maximise the potential for the Council to generate a capital receipt for the Council to support the Capital Programme.
- 2.5 If the Council do not agree to sell the subject sites, the fast food restaurant and take away provider have confirmed that they will progress with a smaller, less ambitious scheme to develop a 'Drive To' restaurant, which would not require the Council's land. The fast food restaurant and take away provider's preference is to deliver a 'Drive Thru' facility on the combined sites.

- 2.6 It is recommended that the Council's freehold interest in the 4 plots shown edged red on the plan are declared surplus, as detailed on the plan in **Appendix 1**, and approval is granted to sell the freeholds of the four plots on the terms detailed in **Appendix 2** to a fast food restaurant and take away provider, thus generating a valuable capital receipt, for this underutilised asset. The completed development will also create new employment opportunities in the Borough. The disposal price will be supported by an independent external RICS "red book" valuation as required by valuation protocols. In accordance with the Council's disposal policy dated September 2020 consultation with local ward members will be undertaken as part of the process of declaring assets surplus to the Council's requirements.
- 2.7 Upon exchange of contracts, the fast food restaurant and take away provider will have 18 months in which to obtain planning permission for their scheme with a "long stop" period of 36 months if the planning application is subject to an Appeal. At expiry of the 36 month 'long stop' date, if planning permission has not been obtained the contract would terminate and the Council would retain the sites.

3. OPTIONS

- 3.1 There would be limited options for the Council, with the alternative being for the Authority not to declare the subject areas of land surplus at this time and retain the land, which will have limited redevelopment opportunities in isolation. If the Council decides to retain the land, it would retain the maintenance liability for the sites with no income to sustain it.

4. FINANCIAL SUMMARY

- 4.1 The report is seeking approval to declare the subject area of land surplus to requirements and approve terms for a disposal to a fast food restaurant and take away provider, on the Heads of Terms agreed in **Appendix 2**, in order to support a comprehensive redevelopment of the site. A capital receipt including the Council's professional fees would be received.

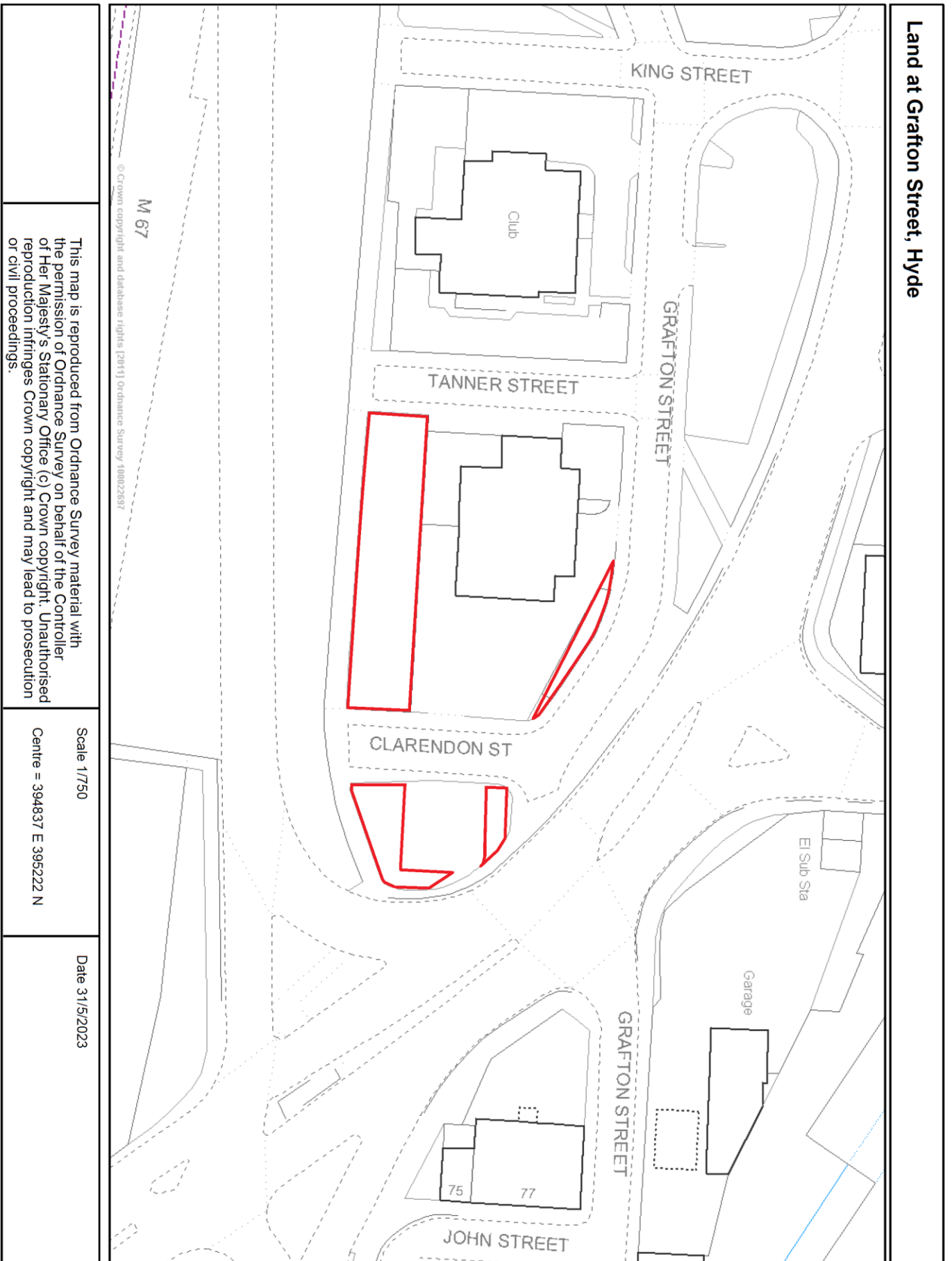
5. RISKS AND MITIGATION

- 5.1 The report seeks approval to declare the sites surplus and approve terms for the disposal in order to receive a capital receipt. The Council will not advertise the plots for sale on the open market, given that the fast food restaurant and take away provider are a 'special purchaser', seeking to deliver a comprehensive development on the combined plots of land. The disposal price will be underpinned by an independent RICS Red Book compliant valuation in order to demonstrate Best Consideration, and compliance with s123 of the Local Government Act 1972.
- 5.2 In addition, if a sale does not proceed the Council would retain the sites' maintenance and management liabilities, the proposed sale minimises this risk.

6. RECOMMENDATIONS

- 6.1 As set out at the front of the report.

Appendix 1



Land at Grafton Street, Hyde

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Date 31/5/2023

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