



Notice of a public meeting of

Corporate Scrutiny Committee

- To:** Councillors Fenton (Chair), Merrett (Vice-Chair), Ayre, Baxter, Coles, Perrett, Taylor, Watson and Widdowson
- Date:** Monday, 2 March 2026
- Time:** 5.30 pm
- Venue:** West Offices - Station Rise, York YO1 6GA

AGENDA

1. Apologies for Absence

To receive and note apologies for absence.

2. Declarations of Interest (Pages 5 - 6)

At this point in the meeting, Members and co-opted members are asked to declare any disclosable pecuniary interest, or other registerable interest, they might have in respect of business on this agenda, if they have not already done so in advance on the Register of Interests. The disclosure must include the nature of the interest.

An interest must also be disclosed in the meeting when it becomes apparent to the member during the meeting.

(Please see the attached sheet for further guidance for Members.)

3. Minutes (Pages 7 - 10)

To approve the minutes of the meeting held on 19 January 2026.

4. Public Participation

At this point in the meeting members of the public who have registered to speak can do so. Members of the public may speak on agenda items or on matters within the remit of the committee.

Please note that our registration deadlines are set as two working days before the meeting, in order to facilitate the management of public participation at our meetings. The deadline for registering at this meeting is **5.00pm on Thursday, 26 February 2026.**

To register to speak please visit www.york.gov.uk/AttendCouncilMeetings to fill in an online registration form. If you have any questions about the registration form or the meeting, please contact Democratic Services. Contact details can be found at the foot of this agenda.

Webcasting of Public Meetings

Please note that, subject to available resources, this meeting will be webcast including any registered public speakers who have given their permission. The meeting can be viewed live and on demand at www.york.gov.uk/webcasts

5. Business Sustainability Programme (Pages 11 - 30)

To receive a report from the Chief Strategy Officer providing a summary of the programme in relation to the activity in York.

6. Scrutiny Recommendation Tracking (Pages 31 - 38)

To receive a report from the Director of Governance presenting a proposed approach for monitoring and tracking scrutiny recommendations.

7. Work Plan

(Pages 39 - 50)

To receive a report from the Head of Democratic Services inviting the Committee to consider and agree its work plan for the remainder of the municipal year.

8. Urgent Business

Any other business which the Chair considers urgent under the Local Government Act 1972.

Contact details

Jane Meller, Democracy Officer
Telephone: (01904) 555209
E-mail: jane.meller@york.gov.uk

For more information about any of the following please contact the Democracy Officer responsible for servicing this meeting:

- Registering to speak
- Business of the meeting
- Any special arrangements
- Copies of reports and
- For receiving reports in other formats

Contact details are set out above.

Alternative formats

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我們也用您們的語言提供這個信息 (Cantonese)

এই তথ্য আপনার নিজের ভাষায় দেয়া যেতে পারে। (Bengali)

Ta informacja może być dostarczona w twoim własnym języku. (Polish)

Bu bilgiyi kendi dilinizde almanız mümkündür. (Turkish)

یہ معلومات آپ کی اپنی زبان (بولی) میں بھی مہیا کی جاسکتی ہیں۔ (Urdu)

Declarations of Interest – guidance for Members

- (1) Members must consider their interests, and act according to the following:

Type of Interest	You must
Disclosable Pecuniary Interests	Disclose the interest, not participate in the discussion or vote, and leave the meeting <u>unless</u> you have a dispensation.
Other Registrable Interests (Directly Related) OR Non-Registrable Interests (Directly Related)	Disclose the interest; speak on the item <u>only if</u> the public are also allowed to speak, but otherwise not participate in the discussion or vote, and leave the meeting <u>unless</u> you have a dispensation.
Other Registrable Interests (Affects) OR Non-Registrable Interests (Affects)	Disclose the interest; remain in the meeting, participate and vote <u>unless</u> the matter affects the financial interest or well-being: (a) to a greater extent than it affects the financial interest or well-being of a majority of inhabitants of the affected ward; and (b) a reasonable member of the public knowing all the facts would believe that it would affect your view of the wider public interest. In which case, speak on the item <u>only if</u> the public are also allowed to speak, but otherwise do not participate in the discussion or vote, and leave the meeting <u>unless</u> you have a dispensation.

- (2) Disclosable pecuniary interests relate to the Member concerned or their spouse/partner.
- (3) Members in arrears of Council Tax by more than two months must not vote in decisions on, or which might affect, budget calculations,

and must disclose at the meeting that this restriction applies to them. A failure to comply with these requirements is a criminal offence under section 106 of the Local Government Finance Act 1992.

City of York Council

Committee Minutes

Meeting	Corporate Scrutiny Committee
Date	19 January 2026
Present	Councillors Fenton (Chair), Merrett (Vice-Chair), Ayre, Baxter, Wells, Widdowson, Waller (Substitute) and Whitcroft (Substitute)
Apologies	Councillors Coles, Watson and Taylor
In attendance	Councillor Rose
Officers Present	Debbie Mitchell, Chief Finance Officer Patrick Looker, Assistant Director of Finance Guy Close, Democratic Services Manager James Parker, Scrutiny Officer

40. Apologies for Absence (5.31 pm)

Apologies were received and noted from Cllrs Coles, Watson and Taylor. Cllr Waller substituted for Cllr Watson and Cllr Whitcroft substituted for Cllr Taylor.

41. Declarations of Interest (5.31 pm)

Members were asked to declare at this point in the meeting any disclosable pecuniary interests or other registrable interests that they might have in the business on the agenda, if they had not already done so in advance on the Register of Interests.

None were declared

42. Minutes (5.32 pm)

Resolved: That the minutes be approved as a correct record for the meeting held on 10 November 2025.

43. Public Participation (5.33 pm)

It was reported that there were no registrations to speak at the meeting under the Council's Public Participation Scheme.

44. Draft Report of the Budget and Medium-Term Financial Strategy Task and Finish Group (5.33 pm)

Cllr Baxter, Chair of the Budget and Medium-Term Financial Strategy (MTFS) Task and Finish Group (TFG), thanked the TFG members, and those finance and democratic services officers involved, for their contributions to the task and then introduced the report. She highlighted the importance of both understanding how council money was spent and effectively communicating messages relating to council finances to residents

During the discussion of the report, the Chair of Corporate Scrutiny asked members to consider each of the seven recommendations in turn. Members praised the new approach taken in the format and presentation of the task and finish group report, and commented on monitoring savings delivery, the proposed joint task and finish group with People scrutiny committee, the financial settlement figures, member training and the communications and engagement strategy. Following an amendment to recommendation two (outlined below), the recommendations were approved unanimously.

In drawing this item to a close, the Corporate Scrutiny Chair put on record his thanks to those involved with the task and finish group.

Resolved:

- i. That recommendation two be amended to read as follows:

That the re-established Task and Finish Group reviews the format of budget and budget monitoring (including how savings are being delivered) reports with a view to ensuring greater accessibility and a sufficient level of detail to understand the impact of decisions taken on the budget.

- ii. That the report and recommendations, subject to the amendment above, be approved.
- iii. That the report be presented to the Executive at their meeting, 3 March 2026.
- iv. The Chair of People Scrutiny be notified of the recommendation for a joint task and finish group, and that this be added to the People work

plan.

- v. That the task and finish group be re-established. Cllrs Baxter and Ayre agreed to remain as members of the group and Labour and Liberal Democrats to each nominate one other Member. The Chair of Corporate Scrutiny to contact the Conservative Group Leader for a nomination.

Reason: To contribute to the development of a structured and consistent approach to budget scrutiny into the new municipal year and beyond.

45. Work Plan (6.18 pm)

Members considered the draft work plan for the committee and the overview scrutiny work plan for the scrutiny committees.

The Chair noted that he was in discussions with officers with a view to receiving an update on the York Central project.

The Scrutiny Officer suggested that a proposal be brought to the next meeting in relation to tracking Scrutiny recommendations, which would address recommendation seven of the previous item.

The following briefing / possible TFG items, relating to Customer Services, were suggested:

- Digital information provision
- AI
- User Journey via the CYC website

Resolved:

- i. That the work plan be noted.
- ii. That a proposal report on tracking scrutiny recommendations be brought to the next committee meeting in March.
- iii. The procurement TFG be removed from the plan.

Reason: To ensure an overview of the scrutiny work plan.

Cllr S Fenton, Chair

[The meeting started at 5.31 pm and finished at 6.33 pm].

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Corporate Scrutiny

2 March 2026

Report of the Chief Strategy Officer

Business Sustainability Programme

Summary

1. The York and North Yorkshire Business Sustainability Programme (BSP) ran from May 2025 to March 2026. This report provides a summary of the programme in relation to activity in York.
2. The BSP is funded through UK Shared Prosperity Fund (UKSPF) and is a continuation of the previous Business Decarbonisation Programme, which provided fully funded energy audits and renewable feasibility studies to businesses across York.
3. The Programme has the ambition to increase the number of enterprises adopting new technologies or processes, to reduce greenhouse gas emissions and to improve businesses bottom-line.
4. A total capital fund of £1,524,393 was allocated, for business grants, with revenue funding provided to the Combined Authority and the Local Authorities to cover costs of administering the fund.
5. As of February 2026, 98% of funding has been allocated to businesses and farms across York and North Yorkshire.
6. Project Summary:

Programme Value	£1,524,393 of capital funding
Application Window	From May 2025 to September 2025. To maximise the delivery timeframe for what are often complex projects requiring external works, grant awards will be made on a rolling basis to projects approved at monthly decision panels, until such time as the fund is exhausted. Early applications are encouraged to avoid disappointment.
Amount of Funding Available	Grants from £2,000 to £49,950
Match Funding Required	The Business Sustainability Programme can fund up to 60% of total project costs – businesses are expected to contribute 40% of project costs

Delivery Window	From July 2025 until February 2026 – projects must be completed by February 2026
Number of applications received	85 Total (funding ask of £2,154,057) 63 Businesses 22 Farms
Projects funded	59 Total (funding allocated of £1,490,907) 41 businesses 18 farms
Carbon Dioxide equivalent (CO ₂ e) savings (per annum)	390tCO ₂ e total 180tCO ₂ e businesses 110tCO ₂ e farms

7. Scrutiny Committee are invited to review the report and reflect on the delivery of the BSP, with feedback welcomed to inform future iterations of the programme.

Background

8. The York and North Yorkshire Combined Authority allocated a proportion of its UKSPF allocation to deliver a Business Sustainability Programme. The programme, co-designed by York and North Yorkshire Combined Authority, North Yorkshire Council and City of York Council, builds on the success of previous UKSPF Business Sustainability programmes across the region.
9. In 2023-2025, City of York Council provided fully funded energy audits and renewable feasibility studies to businesses across the city. A total of 63 decarbonisation plans were completed for York businesses, identifying opportunities with a total implementation cost of over £3m and the potential to reduce carbon dioxide equivalent (CO₂e) emissions by 935tonnes per year, with annual cost savings of £914,000.
10. The BSP was subsequently designed to support these businesses to implement the opportunities identified, delivering climate action and contributing to the economic growth of our region. All businesses and farms across the region that had received a decarbonisation/energy audit from a qualified assessor were eligible for the BSP.
11. Reflecting the value of informed decision making, the BSP also extended the offer of fully funded decarbonisation and energy audits to businesses and farms across the region.

Programme Objectives

12. The BSP is intended to support businesses and farms across York and North Yorkshire to implement recommendations from their energy audit. Wider objectives of the programme cover:
- Supporting decarbonisation across the region in alignment with the objectives of [York and North Yorkshire's Strategy for a Sustainable Future](#)
 - Supporting business resilience through increased energy security and climate change adaptation
 - Facilitating measures that are not only good for the planet, but for business' bottom lines
 - Developing York and North Yorkshire as a hub for 'green business' and showcase the commercial benefits of decarbonising your business
 - Enabling farm business resilience through reduced emissions, increased energy efficiency and lower costs.
 - Developing demonstration businesses that can support knowledge-sharing and encourage wider future uptake of energy efficiency and renewable measures.

Eligibility

13. Any businesses who have a trading address within the York and North Yorkshire region, regardless of size or sector, including business-to-consumer and business-to-business models. Farms, as well as landlords of commercial units, business parks and other non-domestic buildings (domestic residential properties are not eligible for this program) were eligible for the programme. Applicants must have been customer trading for a minimum of 2 years to be eligible, and must have undertaken an energy audit within the last 3 years.¹
14. Eligible project activity within this programme included:
- Energy efficiency measures
 - Retrofit of commercial buildings – lighting upgrades, insulation etc.
 - Energy system optimisation measures
 - Renewable energy generation and battery storage

¹ Audits can have been carried out either through a York and North Yorkshire local authority scheme or through a suitable private sector organisation.

- Reducing waste and making resources go further
- Works with the aim of improving a business' climate resilience
- Climate adaptation
- Improving biodiversity
- Decarbonising fleet and transport

Application Process

15. Businesses were invited to apply for funding via an online application form (Annex A) with promotion and support provided through the Growth Hub and local Growth Managers.
16. Applications were screened for compliance by the Growth Hub before being assessed by the Carbon Reduction Team against a criteria following HM Treasury's 5 Cases methodology, to ensure applications demonstrate the strategic, economic, financial, commercial and management case for investment.
17. Applicants were required to:
 - Explain and evidence the need for the project
 - Explain and evidence the strategic fit with the programme objectives
 - Explain and evidence the positive impact the project will have and explain how measurable outputs and outcomes will be achieved.
 - Provide an accurate and reasonable breakdown of project costs
 - Explain how the project will be deliverable in full within the timeframe
 - Explain who will be managing the project and their track record in delivery
18. An independent Decision Panel was established to review application decisions and approve funding allocations. The Panel was represented by York and North Yorkshire Combined Authority, North Yorkshire Council, City York Council, Grow Yorkshire. The Panel met monthly during the open application window, with decision notices published on the Combined Authority website after each panel session.
19. Applicants were required to:
 - Take a 'fabric first' approach, focussing on improving energy efficiency prior to new heating or energy installations for property-based projects

- Have landlord’s permission in place if not the owner of the premises
- Have planning permission in place or be confident of receiving permission if required
- Follow all necessary building regulations
- Provide a minimum of two supplier quotes
- Include a full cost breakdown

Response

20. A total of 24 applications were received for businesses in York (37% of total – 65), with a total funding request for £491,467. A total of 2 applications were received from farms in York (9% of the total – 22), with a total funding request for £71,535.
21. A summary of the types of applications received is provided below. The total does not reflect the total number of applicants as some proposals included multiple measures:

Measure	
Renewable energy	
Upgraded heating system	
Fabric or lighting improvements	
Other	

22. Of the 26 York applications received (24 businesses + 2 farms), 2 were not reviewed by the panel due to a lack of information and failure of the businesses to provide this on request. Of the 24 applications that went to panel, 17 were approved (71%). The total grant value for approved applications was £361,675.
23. Business contributions totalled £259,128 meaning the total level of investment in low carbon solutions in York businesses is £620,803. A full summary of the number of applications, panel decisions and grant values is provided in the table below:

	York	North Yorkshire	Total
Business Applications	24	39	63
(Grant Value)	(£491,467)	(£1,023,499)	(£1,514,966)
Farm Applications	2	20	22
(Grant Value)	(£71,535)	(£567,556)	(£639,091)
Business Approvals	16	25	41
(Grant Value)	(£284,545)	(£664,706)	(£949,251)
Farm Approvals	1	17	18
(Grant Value)	(£49,950)	(£491,706)	(£541,656)

24. The programme received significant interest from businesses and farms that had not previously received a decarbonisation or energy audit. Some organisations were able to receive these from the private sector in order to apply for funding within the window, however, it was acknowledged that this could be a barrier for others.
25. With remaining funding, the Growth Hub commissioned an additional 40 fully funded energy audits for businesses and farms across the region. These were fully subscribed within two days, with 9 York businesses benefiting. This demonstrates strong demand for the service and an expectation amongst businesses that future grants for decarbonisation measures would receive strong take-up.
26. Additional demand exists within the business community for this type of support programme, with a clear need for financial support to remove a critical barrier to implementation.

Consultation

27. Development of the programme was undertaken in consultation with the York and North Yorkshire Combined Authority Growth Hub, City of York Council Carbon Reduction and Business Growth teams and North Yorkshire Council.
28. Feedback was taken from delivery of the previous UKSPF business sustainability support programme (and its evaluation) during the design process.
29. Regular progress reports were provided to the internal officer Climate Change and Natural Capital Programme Board.
30. Consultation with delivery partners and enabling services such as the Local Planning Authority is required for future phases as many projects interfaced with these services. The capacity of these areas to respond to requests within the project timescales was challenging and created additional pressures.
31. The MCA will need to consult with businesses on what they see as critical support requirements for 2026/7 and 2027/28. Carbon reduction was a key driver for this programme, but feedback is that reduction in utility bills is an even bigger driver in the current economic climate.

Council Plan

32. Affordability - Tackling the cost-of-living crisis
The programme has supported businesses to identify and implement actions that lead to a direct operational cost saving, as well as providing grant funding support to implement improvements to the business
33. Climate - Environment and the climate emergency
A key metric for the programme is to reduce carbon emissions, supporting the ambitions of the Council's Climate Change Strategy.

Implications

- **Financial** – Financial implications are discussed within the body of the report. The programme was fully funded by UK Shared Prosperity through the Combined Authority.

- **Human Resources (HR)** – No implications identified
- **Equalities** – No implications identified
- **Legal** – All business grants were subject to a Subsidy Control Assessment undertaken by the MCA. All issued grants included a Grant Funding Agreement stipulating the requirement of the grant
- **Crime and Disorder** – No implications identified
- **Information Technology (IT)** – No implications identified
- **Property** – No implications identified

Risk Management

34. No known risks

Recommendations

35. Members are asked to consider the content of the report and provide comment and feedback for the Executive Member and Combined Authority to influence future iterations of business support programmes.

Reason:

As part of the continuous improvement approach to service provision.

Contact Details

Author:

Shaun Gibbons
Head of Climate Change
City Development

Chief Officer responsible:

Claire Foale
Chief Strategy Officer

Report Approved Date 16/02/2026

Wards Affected: *List wards or tick box to indicate all*

For further information please contact the author of the report

Background Papers:

None

Annexes

Annex A – Business Sustainability Programme: Application Form

Abbreviations

BSP – Business Sustainability Programme

CO₂e – Carbon Dioxide equivalent

HM Treasury – His Majesty's Treasury

UKSPF – United Kingdom Shared Prosperity Fund

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Business Sustainability Grant Programme

Application form

Before completing this application, please ensure you have read the programme specification and the application guidance notes.

You can save this form and come back to it at any time. Please see the application guidance notes for instructions on how to do this.

Please be aware that you will need to upload the following documents into the form as part of your application:

- Your energy audit
- A copy of your latest financial accounts
- 2 quotes for capital items

You may be required to submit further documentation depending on your answers to the questions in Section 2: Project Compliance. See this section for further details.

Section 1: Applicant Information

Please confirm your application type *

Business/Farm Name *

Contact Name *

First Name

Last Name

Position *

Email *

Telephone Number *

Trading/farm address *

Street Address

Street Address Line 2

City

County

Postcode

Which constituency area is your business/farm located in? *

Is your trading address the same as your registered address? *

Please provide your registered address, as well as clarification about why it is different to your trading address.

Business/Farm Website

Company Registration Number (if you have one)

Customer Trading Start Date *

Current Number of Full Time Equivalent Employees *

(eg 2 x employees who work 2.5 days a week = 1 full time equivalent employee)

Is your business/farm VAT registered? *

VAT Registration Number

Sector *

- Manufacturing
- Food and Drink
- Tourism
- Financial and Professional Services
- Creative and Digital
- Other*

***If other, please state**

Section 2: Project Compliance

Do you require planning permission for your project? *

Have you applied for planning permission?

Please provide your planning case number below (if planning permission is pending)

Do you own the property or site the project relates to? *

Do you have the landlord's permission to carry out this project?

Please confirm the length of time remaining on your lease.

Does your project need Building Regulations approval? *

Have you applied for Building Regulations approval? *

Please provide your application case number below (if approval is pending)

Please explain why Building Regulations approval is not required.

Please click the button below to confirm you are confident in the structural integrity of the project property. *

I confirm

Please give a reason for your answer.

Approximately when was the project property constructed? *

Please click the button below to confirm your business will cover the costs of any additional works that may be required to complete the project, but which fall outside the remit of this programme. *

I confirm

Section 3: Project Information - Strategic Fit and Impact

Please give a short description of your project which can be used for any future publication (25 words max) *

0/25

Which of the outputs and outcomes given in the programme specification does this project relate to (Select all that apply) *

Supporting decarbonisation across the region

Supporting business resilience through increased energy security and climate change adaptation

Developing YNY as a hub for 'green business' and showcasing the commercial benefits of decarbonising your business

Facilitating measures that are not only good for the planet but for businesses' bottom lines.

Enabling farm business resilience through reduced emissions, increased energy efficiency and lower costs

Developing demonstration businesses that can support knowledge-sharing and encourage wider future uptake of energy efficiency and renewable measures

Which energy audit recommendation(s) does your project aim to implement? Why have you prioritised implementing this recommendation? *

Please identify a measurable environmental goal for your project that relates to either reduction of carbon dioxide equivalent emissions and/or reduction in energy consumption and/or renewable energy generation. *

Please provide a measurable business goal for your project. *

Tell us how the project will continue to deliver and produce benefits after the funding from this programme ends. *

Section 4: Project Information - Finance

What is the total estimated cost of your project? (Exclude VAT if you are registered for VAT) *

How much grant funding are you applying for? (Please input an amount between £2,000 to £49,950). *

You cannot apply for more than 60% of the total project cost.

Please explain how you will fund the remaining project costs. *

Please explain why you need a grant to deliver this project. *

Please provide a budget breakdown of the total project cost, covering all major items/areas of anticipated project expenditure.

Name of Item

Cost (£)

1

- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

For any non-capital items listed above, please advise what steps you will take to ensure best value/that services are provided at a competitive price.

Section 5: Project Information - Delivery

Please outline the delivery plan for your project: include key dates, activity and milestones. *

Tell us how the project will be managed on a day to day basis and by whom. *

Tell us who will be accountable for the project, in terms of delivery and compliance with the

technical guidance provided in the specification. *

Tell us about any key risks to the project and how they will be mitigated *

Tell us about previous experience your business/farm has in project delivery. *

Section 6: Signature and legal information

UK Subsidy Control Regime

Please note that, as a public authority, the York and North Yorkshire Combined Authority must comply with the terms of the Subsidy Control Act 2022 and grants may only be awarded where they are fully compliant with Subsidy Control regulations. By proceeding, you are agreeing to provide the necessary details of your project and to any required undertakings to comply with and to enable the Combined Authority to meet its legal Subsidy Control obligations. This may include, but is not limited to, the submission by you of a satisfactory subsidy control assessment and/or declarations, notifications or announcements to the relevant authorities pursuant to Subsidy Control legislation. For more information, [click here](#).

Data Protection

The York and North Yorkshire Combined Authority is committed to protecting and respecting your privacy. Any personal data collected will be processed by the York and North Yorkshire Combined Authority only for the purposes of contacting applicants and assessing applications. Personal data may be shared with central government departments, North Yorkshire Council and City of York Council, or any other third party organisations directly involved in the delivery of UK Shared Prosperity Fund programmes. For more information about how the organisation will use your personal data, [click here](#).

In order to process your application, we need to store and process your personal data and share this with partners directly involved in the delivery of the programme. If you consent to us storing your personal data for this purpose, please tick below: *

I agree to allow York and North Yorkshire Combined Authority and partners directly involved in this

programme to store and process my personal data.

From time to time, we would like to contact you about our products and services that may be of interest to you. If you consent to us contacting you for this purpose, please tick below to say how you would like us to contact you:

- I agree to receive communications from the York and North Yorkshire Combined Authority
- I would like to receive regular updates from the York and North Yorkshire Growth Hub about free business support, events, news and other opportunities.

Declaration

I authorise you to verify any information provided and confirm that you can check my Council accounts to ensure they are up to date (for example Business Rates). Where businesses are not up to date with their accounts, they will be given the opportunity to rectify this prior to the grant being considered. I understand that if I supply false or incomplete information, or I fail to notify you of relevant changes of circumstance, any money paid in grant funding will be recovered in full. I understand that lobbying of any member/official will nullify my application. I confirm I have not yet purchased items included within this application. I understand that any offer of grant will be subject to terms and conditions, which must be accepted within 30 days and prior to starting my project. I declare that the information I have given on this form is correct and complete and agree to the specified terms. I understand that grant payment will not be made up front. I will need to pay for the project first and then submit a claim. (A claim form will be provided with the funding agreement).

Name *

Position *

Date *

Day Month Year

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Corporate Scrutiny Committee

2 March 2026

Report of the Head of Democratic Services

Scrutiny Recommendation Tracking

Summary

1. This report presents the Corporate Scrutiny Committee with a proposed approach to monitor and track scrutiny recommendations and invites the Committee to consider how it wishes to categorise the levels of progress made against scrutiny recommendations.

Background

2. In accordance with the Council's Constitution, scrutiny committees may make recommendations to the Executive on functions the Council is responsible for, through both formal scrutiny committee meetings and Task and Finish Group reports.
3. Developing a structured approach to scrutiny recommendation tracking was one of the recommendations arising from the review of the Council's scrutiny function conducted by the Centre for Governance and Scrutiny (CfGS) during the 2024/25 municipal year. The CfGS recommendation to 'Introduce a formal process to track recommendations that Scrutiny makes' was endorsed by Council on 27 March 2025.
4. The Executive / Scrutiny Protocol for City of York Council, which was developed as part of work to implement the CfGS recommendations, was incorporated into the Council's Constitution following agreement by Council on 18 September 2025. With reference to recommendation tracking it states that: 'Recommendations from Scrutiny will be logged and tracked by Democratic Services and Scrutiny Committees will receive formal reports twice each year on the number of recommendations that have been accepted and incorporated through the decision-making process and the level of progress made against the recommendations.'

5. At the Corporate Scrutiny Committee meeting held on 19 January 2026, following the agreement by the Committee of the recommendations to Executive from the Budget and Medium-Term Financial Strategy Task and Finish Group (TFG), members agreed to consider an item on recommendation tracking at the present meeting.

Consultation

6. Consultation, including around examples of best practice from other local authorities, has taken place within the Democratic Services team on the below proposals which are presented for the committee's consideration.
7. Best practice guidance produced by the CfGS highlights the importance of a structured, systematic approach to recommendation tracking; evaluating progress towards the implementation of scrutiny recommendations is an essential part of assessing the impact of scrutiny. Effective monitoring will also enable scrutiny members to more clearly identify if further scrutiny activity is required.

Proposed Approach

8. It is proposed that a Scrutiny Recommendation Tracker, incorporating recommendations made to the Executive from TFGs and any other recommendations to the Executive agreed scrutiny committee meetings, will be maintained and updated regularly by Democratic Services. A draft example tracker is included at Annex A to this report.
9. If desired by members, a review of scrutiny recommendations made during the current term of office can be undertaken by the Scrutiny Officer for inclusion, where appropriate, on the tracker.
10. The Corporate Scrutiny Committee will be provided with an update on progress made against each of the recommendations at two Committee meetings over the course of the municipal year, starting in autumn 2026. This arrangement reflects the Committee's constitutional responsibilities as the Council's statutory scrutiny committee, and is in line with existing practice in respect of the updates the Committee receives on both Council Motions and Petitions.
11. The tracker will include a suggested status for each of the recommendations, following a 'traffic light' approach as below:

- Green: recommendation achieved – monitoring no longer required;
- Amber: acceptable progress made – continue monitoring;
- Red: unacceptable progress made – lead officer / Executive Member to report back.

12. The Committee will be invited to consider and agree the status of each recommendation. In line with CfGS guidance that recommendations should not be monitored indefinitely, when it has been agreed that a recommendation has been achieved it will be deemed complete and will no longer be tracked.

Options

13. Members of the Committee may choose to endorse, revise, or reject the proposed approach.

Analysis

14. Implementing the proposed approach would contribute to the development of a systemic and consistent approach to recommendation tracking, in fulfilment both of Article 8 Paragraph 14.5.3 of the Council's Constitution and the recommendations of CfGS as agreed by Council.

15. The benefits of such an approach include ensuring Members are kept updated in a clear and regular way on progress made against scrutiny recommendations, facilitating clearer identification of areas where further scrutiny work might be needed, and (in conjunction with the forthcoming Annual Scrutiny Report) providing evidence to demonstrate the impact of scrutiny activity at City of York Council.

Implications

- Financial: None arising directly from this report.
- Human Resources (HR): None arising directly from this report.
- Equalities: None arising directly from this report.
- Legal: None arising directly from this report. The Council has a statutory duty to operate a scrutiny function.
- Crime and Disorder: None arising directly from this report.

- Information Technology (IT): None arising directly from this report.
- Property: None arising directly from this report.
- Other: None arising directly from this report.

Risk Management

15. There could be a risk to the ongoing development of effective recommendation tracking should a more structured and consistent approach not be endorsed. No other risks arising directly from this report have been identified.

Recommendations

16. Members are asked:
- To endorse the proposed approach to monitoring and tracking scrutiny recommendations, which invites the Committee twice a year to review the level of progress made against scrutiny recommendations.

Reason: To contribute to the development of a structured and consistent approach to tracking and monitoring scrutiny recommendations.

Contact Details

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Chief Officer Responsible for the report:

Julie Gallagher
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**Report
Approved**



Date 20 February
2025

Wards Affected:

All



For further information please contact the author of the report.

Background Papers:

City of York Council Constitution, Article 8: Scrutiny

<https://democracy.york.gov.uk/documents/s185896/08%20-%20Article%208%20-%20Scrutiny.pdf>

Centre for Governance and Scrutiny (CfGS), *Scrutiny Impact Report: City of York Council* (January 2025),

<https://democracy.york.gov.uk/documents/s182228/Annex%20A%20York%20Scrutiny%20Impact%20Report.pdf>

Centre for Governance and Scrutiny (CfGS), *Demonstrating impact – a practice guide* (February 2025),

<https://www.cfgs.org.uk/resource/demonstrating-impact-a-practice-guide/>

Annexes

Annex A – Scrutiny Recommendation Tracker – Draft example

Abbreviations

CfGS	Centre for Governance and Scrutiny
TFG	Task and Finish Group

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ANNEX A

Scrutiny Recommendation Tracker (DRAFT EXAMPLE)

An example of how this information will be presented to Members; please see key below for further details.

Reference	Origin	Date	Area	Recommendation	Exec Date	Lead Officer/EM	Action taken	Status
SR (25/26) 01	CRP	01/01/26	Finance	Full text of the recommendation...	01/02/26	DM/PL/KL	A list of actions identified: <ul style="list-style-type: none"> Action 1 Action 2 These actions are all complete as of X date.	Complete
SR (25/26) 02	CRP	01/01/26	Finance	That XYZ be completed by...	01/02/26	DM/PL/KL	Summary of progress to date and ongoing work identified...	Ongoing
SR (25/26) 03	PPL	01/02/26	ASC	That XYZ...	01/03/26	SS/LSW	As above...	Ongoing
SR (25/26) 04	PLC	01/02/26	Health	That ABC...	01/03/26	PR/LSW	Detail of action taken.	Complete
SR (23/24) 19	CSMC	01/04/24	Governance	That ABC be completed by...	01/05/24	JP/CD	Detail including reasons (where available) for lack of progress, a pause etc e.g. due to capacity issues, a change in government policy etc.	e.g. Paused

Key

Reference: Each recommendation will be assigned a reference indicating the municipal year the recommendation was made.

Origin: CRP (Corporate Scrutiny Committee); PPL (People Scrutiny Committee); PLC (Place Scrutiny Committee); if Members would like a review of recommendations from previous Committees carried out additional acronyms can be included as required.

Date: Date of the Committee meeting recommendation was agreed.

Area: Directorate/Portfolio area as appropriate.

Exec Date: Date recommendation was considered by Executive.

Lead Officer/EM: Name/initials as appropriate.

Action taken: Summary detailing actions to date.

Status:

- **Green:** recommendation achieved – monitoring no longer required;
- **Amber:** acceptable progress made – continue monitoring;
- **Red:** unacceptable progress made – lead officer / Executive Member to report back.



Corporate Scrutiny Committee

2 March 2026

Report of the Head of Democratic Services

Corporate Scrutiny Committee Work Plan

Summary

1. This report presents the Committee's draft work plan at Annex A for Members' consideration. The Scrutiny Overview Work Plan is also presented for information at Annex B.

Background and Approach

2. The Committee sets its own programme of work, with input from Executive Members, officers and residents. A draft work plan is set at the start of the municipal year and, as a live document, is a standing item for consideration at each meeting.
3. The Committee's work plan should not be considered a fixed, rigid schedule, but instead can be adapted to reflect any new and emerging issues throughout the municipal year, and any timetabling issues that might occur from time to time.
4. In agreeing its work plan, the Committee should consider the resources, remit and powers available to it whilst also prioritising those areas of scrutiny which would be of most value. The role and remit of the Committee is set out fully in Article 8 of the Council's Constitution.
5. In considering any developments and/or modifications to the work plan, effort should be made to:
 - Avoid unnecessary duplication, including any existing groups already monitoring a particular issue.
 - Ensure any review work has clarity and focus of purpose, will add value, and can be delivered within an agreed timeframe.
 - Consider available resources and relevant timeframes, bearing in mind the Committee's workload and the type of scrutiny activity.

- Build in sufficient flexibility to enable consideration of any urgent matters that may arise during the municipal year, noting that items can be carried over to the following municipal year if required.

Implications and Risk Management

6. There are no direct implications or risks arising from this report; any relevant implications and risks will be identified in the cover report for each agenda item.

Recommendations

7. Members are asked:
 - i. To consider and agree the Committee's work plan for the remainder of the 2025/26 municipal year.

Reason: To ensure that the Committee maintains an appropriate programme of work.

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**Report
Approved**



Date 20 February
2025

Wards Affected:

All



For further information please contact the author of the report.

Background Papers

City of York Council Constitution, Article 8: Scrutiny,
<https://democracy.york.gov.uk/documents/s185896/08%20-%20Article%208%20-%20Scrutiny.pdf>

Annexes:

Annex A – Corporate Scrutiny Committee Work Plan, March 2026

Annex B – Scrutiny Overview Work Plan, March 2026

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ANNEX A
Corporate Scrutiny Committee Work Plan 2025/26

Theme	Item	Lead Officer / Exec Member	Notes
9 June 2025			
	Outer Ring Road and Station Gateway	Garry Taylor Cllr Lomas	Pre-decision Scrutiny
	2026/27 outline budget process	Debbie Mitchell	
7 July 2025			
	Harewood Whin Green Energy Park Business Case	Shaun Gibbons Cllr Kent	Pre-decision scrutiny
	Budget Task and Finish Proposal	Debbie Mitchell Cllr Lomas	
8 September 2025			
	10-year anti-poverty strategy	Pauline Stuchfield, Sam Blyth	Pre-decision scrutiny
	Next steps in securing investment for York	Sam Blyth, Claire Foale, Garry Taylor Cllr Douglas	
	2024/25 F&P Outturn	Debbie Mitchell, Ian Cunningham, Cllr Lomas	Planned to come in July but deferred as the date of Executive was changed
	Scrutiny Shared Vision	James Parker / Guy Close Cllr Douglas	
01 October 2025 (additional meeting)			
	Castle Gateway	Garry Taylor	Pre-decision scrutiny

Theme	Item	Lead Officer / Exec Member	Notes
		Cllr Lomas	
	Report of the Task & Finish Group on the Boundary Commission review	Bryn Roberts Cllr Douglas	To agree a recommendation to go to Executive
	Draft Comms Strategy	Claire Foale / Michael James Cllr Douglas	Pre-decision scrutiny
10 November 2025			
	Complaints/Compliments annual report	Lorraine Lunt / Cllrs Lomas / Douglas	Annual update
	Petitions Schedule	Bryn Roberts	Six-monthly update
	Council Motions	Bryn Roberts	Six-monthly update
	Audit recommendations – Emission reporting process and Climate Action Plan	Shaun Gibbons / Cllr Kent	
19 January 2026			
	Budget and MTFs Scrutiny, final report	James Parker Cllr Baxter Debbie Mitchell Cllr Lomas	

2 March 2026			
	Evaluation of the business decarbonisation support programme	Shaun Gibbons / Cllr Kent	
	Scrutiny Recommendation Tracking	James Parker	
11 May 2026			
	City LEAP	Shaun Gibbons / Cllr Kent	
	Petitions Schedule	Bryn Roberts	Six-monthly update
	Council Motions	Bryn Roberts	Six-monthly update
	Scrutiny Annual Report	James Parker	

Potential topics for all-member briefing sessions or public meetings

Item	Origin	Lead Officer and Exec Member	Notes
Major projects – York Central update		Garry Taylor / Cllr Lomas	Public meeting – July tbc
Community Woodland update from Forestry England	Cllr Kent	Shaun Gibbons Cllr Kent	Briefing, 16/04/26
Digital Switchover		Roy Grant	Briefing, 26/02/26
Customer Services developments: <ul style="list-style-type: none"> • Digital information provision • AI 		Pauline Stuchfield, Eilidh Carricker	

Item	Origin	Lead Officer and Exec Member	Notes
<ul style="list-style-type: none"> • User journey (website) 			
F&P Q1	Regular Report	Debbie Mitchell, Ian Cunningham Cllr Lomas	Information to be shared with members via e-mail
F&P Q2	Regular Report	Debbie Mitchell, Ian Cunningham Cllr Lomas	Information to be shared with members via e-mail
F&P Q3	Regular Report	Debbie Mitchell, Ian Cunningham Cllr Lomas	Information to be shared with members via e-mail
Local Nature Recovery Strategy	Moved from November's meeting	Shaun Gibbons / Guy Hanson / Alison Cooke Cllr Kent	Briefing. Consultation over the summer, due for approval 04/11/25
Community Infrastructure Levy		Alison Cooke	Better understand the approach to implementation of the CIL in parished and unparished areas, and in particular, what advantages parished areas might have.
S106	Govt announcement	Alison Cooke	Government plans

Briefing session dates

- Thursday 26 February – Digital switchover

- Thursday 16 April – Community Woodland Update

Agreed Task & Finish Groups

Topic and timescale	Aims and objectives	Membership
<p>Preparing for proposed changes to long-term sickness and disability benefits.</p> <p>No timescale set for final report to People Scrutiny Committee</p>	<ul style="list-style-type: none"> • Acquire a detailed understanding of the scope of the proposed changes and the likely direct and indirect impacts • Establish the number of York residents likely to be affected by the changes if they are implemented as currently proposed • Identify what additional financial or other support affected residents may seek to access from the council and partners • Identify how affected residents can best be supported to access help, such as applying for other benefits for which they may be eligible • Establish whether capacity exists to meet a potential increase in demand for services or support • Make recommendations as to how the council and partners can most effectively allocate resources to support affected residents 	<p>Cllr Fenton Cllr Runciman Cllr Steward Cllr Coles Cllr J Burton</p>

<p>Budget and Medium-Term Financial Strategy Scrutiny</p> <p>Final report to be considered at Corporate Scrutiny Committee meeting on 19 January 2026</p> <p>COMPLETED</p>	<ul style="list-style-type: none"> • Review the council’s MTFS • Review the process through which the council will engage with residents, businesses and other stakeholders as it develops and engages on its 2026/27 budget proposals • Review the process through which the MTFS informs the approach to budget-setting • Consider whether and how the budget proposals align with the Council Plan and the ten-year strategies • Review responses to the public consultation on budget proposals and consider any recommendations to Executive • Consider any improvements to the budget-setting process which could be adopted for future years 	<p>Cllr Ayre Cllr Hook Cllr Baxter Cllr Moroney</p>
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Possible Task & Finish Groups

Topic	Aims and objectives	Membership
Budget - Adult Social Care	Joint, with People Scrutiny	Cllr Burton and Cllr Moroney

ANNEX B

Scrutiny Overview Work Plan

Meeting Date	Committee	Agenda Item
02/03/26	Corporate	<ul style="list-style-type: none"> • Evaluation of the business decarbonisation support programme • Scrutiny Recommendations, Tracking procedure
24/03/26	Place	<ul style="list-style-type: none"> • Local Transport Plan Update • Rougier Route Bus Priority Proposals
17/03/26	People	<ul style="list-style-type: none"> • Adult Social Care CQC Report • Carers Strategy Update (TBC).
15/04/26	People	<ul style="list-style-type: none"> • City of York Safeguarding Adults Board Strategy and Annual Report, • Food Insecurity Task and Finish Group Draft Report
11/05/26	Corporate	<ul style="list-style-type: none"> • City LEAP • Petitions Schedule • Council Motions • Scrutiny Annual Report

The Forward Plan can be found [here](#).

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