

## **Notice of a public meeting of Executive**

**To:** Councillors Douglas (Chair), Kilbane (Vice-Chair), Kent, Lomas, Pavlovic, Ravilious, Steels-Walshaw and Webb

**Date:** Tuesday, 15 July 2025

**Time:** 4.30 pm

**Venue:** West Offices - Station Rise, York YO1 6GA

### **A G E N D A**

#### **Notice to Members – Post Decision Calling In:**

Members are reminded that, should they wish to call in any decisions made on items\* on this agenda, notice must be given to Democratic Services by **4:00 pm on Tuesday, 22 July 2025**.

\*With the exception of matters that have been the subject of a previous call in, require Full Council approval or are urgent, which are not subject to the call-in provisions. Any called in items will be considered by the Corporate Services Scrutiny Committee.

#### **1. Apologies for Absence**

To receive any apologies for absence.

#### **2. Declarations of Interest**

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.

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

<b>Type of Interest</b>	<b>You must</b>
<i>Disclosable Pecuniary Interests</i>	<i>Disclose the interest, not participate in the discussion or vote, and leave the meeting <u>unless</u> you have a dispensation.</i>
<i>Other Registrable Interests (Directly Related)</i> <b>OR</b> <i>Non-Registrable Interests (Directly Related)</i>	<i>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.</i>
<i>Other Registrable Interests (Affects)</i> <b>OR</b> <i>Non-Registrable Interests (Affects)</i>	<i>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.</i>

- (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.*

### **3. Exclusion of Press and Public**

To consider the exclusion of the press and public from the meeting during consideration of the following:

Annexes A and B to agenda item 12 on the grounds that it contains information relating to the financial or business affairs of any particular person (including the authority holding that information). This information is classed as exempt under paragraph 3 of Schedule 12A to Section 100A of the Local Government Act 1972 (as revised by The Local Government (Access to Information) (Variation) Order 2006).

### **4. Minutes** (Pages 7 - 18)

To approve and sign the minutes of the Executive meeting held on 3 June 2025.

### **5. 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 Executive.

**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 Friday, 11 July 2025.**

To register to speak please visit [www.york.gov.uk/AttendCouncilMeetings](http://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](http://www.york.gov.uk/webcasts).

### **6. Forward Plan (Pages 19 - 20)**

To receive details of those items that are listed on the Forward Plan for the next two Executive meetings.

### **7. Strengthening York's Support for Drug and Alcohol Recovery (Pages 21 - 50)**

To receive a report from the Director of Public Health on the next steps needed to strength York's community recovery model, in line with council plan aspirations.

### **8. 2024/25 Finance and Performance Outturn (Pages 51 - 104)**

To receive a report from the Director of Finance providing a year end analysis of the overall finance and performance position for the year.

### **9. Treasury Management annual report and review of Prudential Indicators for 2024/25 (Pages 105 - 126)**

To receive a report from the Director of Finance providing an update on Treasury Management activity and the outturn position for the 2024/25 financial year.



**10. Capital Programme Outturn 2024/25 and Revisions to the 2025/26 - 2029/30 Programme** (Pages 127 - 166)

To receive a report from the Director of Finance setting out the capital programme outturn position for 2024/25 including any under/overspends and adjustments, along with an update to the future years programme.

**11. Major Projects (Station Gateway and York Outer Ring Road Business Case)** (Pages 167 - 212)

To receive a report from the Director of City Development providing an update on the design, delivery and current progress of York Station Gateway and York Outer Ring Road, including their funding status.

**12. Approval of Property Management Arrangements - Follow-Up Report** (Pages 213 - 240)

To receive a report from the Director of Housing and Communities, which following a review of the existing YorHome arrangements outlines the need to rectify a number of further arrangements as set out in the exempt annexes and the need to deliver workable and responsive decision-making processes in line with Veritau internal audit guidance and recommendations.

**13. Equity, Diversity and Inclusion Strategy** (Pages 241 - 284)

To receive a report from the Director of Housing and Communities which seeks Executive approval for both the final strategy and annual action plan.

**14. Update on Future Libraries Investment Programme** (Pages 285 - 314)

To receive a report from the Director of Housing and Communities in relation to the Future Libraries Investment Programme.

## **15. Parks Capital Programme**

(Pages 315 - 328)

To consider a report from the Assistant Director of Finance which seeks approval from Executive to apply the criteria to a range of possible schemes and projects in the summer and to report back to the Executive in September where approval will be sought on which should proceed.

## **16. Urgent Business**

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

Contact details:

- Guy Close, Democratic Services Manager
- Mobile – (07922) 517103
- E-mail – [guy.close@york.gov.uk](mailto:guy.close@york.gov.uk)

For more information about any of the following please contact the Democratic Services 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

**If you require this document in an alternative language or format (e.g. large print, braille, Audio, BSL or Easy Read) you can:**



Email us at: [cycaccessteam@york.gov.uk](mailto:cycaccessteam@york.gov.uk)



Call us: **01904 551550** and customer services will pass your request onto the Access Team.



Use our BSL Video Relay Service:  
[www.york.gov.uk/BSLInterpretingService](http://www.york.gov.uk/BSLInterpretingService)

Select 'Switchboard' from the menu.



**We can also translate into the following languages:**

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 میا کی جاسکتی ہیں۔ (Urdu)

This page is intentionally left blank

City of York Council

Committee Minutes

---

Meeting

Executive

Date

Tuesday, 3 June 2025

Present

Councillors Douglas (Chair), Kilbane (Vice-Chair), Kent, Lomas, Pavlovic, Ravilious, Steels-Walshaw and Webb

In attendance

Councillor Ayre

**100. Apologies for Absence**

There were no apologies for absence.

**101. Declarations of Interest**

Members were asked to declare at this point in the meeting any disclosable pecuniary or other registerable interests they had in respect of business on the agenda, if they had not already done so in advance on the register of interests.

Councillor Kilbane declared a non-pecuniary interest in relation to agenda item 8, The York Business Improvement District (BID) – Ballot for 2026-31, in his capacity as a board member of York BID.

Councillor Kilbane also declared a pecuniary interest in relation to agenda item 9, Review of Parking Charges, on the basis that he owned a business on Bishopthorpe Road. He left the meeting prior to consideration of the item and did not vote.

**102. Minutes**

**Resolved:** That the minutes of the Executive meeting held on 22 April 2025 be approved and signed by the Chair as a correct record.

**103. Public Participation**

It was reported that there had been ten registrations to speak at the meeting under the Council's Public Participation Scheme.

One of the representatives registered to speak reported shortly before the meeting that she was unable to attend due to a late change in work commitments.

The following representatives attended:

- Johnny Hayes spoke in relation to agenda item 9, Review of Parking Charges. As a former shopkeeper on Bishopthorpe Road he was particularly concerned about the parking charge increase from 80p to £4.85. Local businesses and residents were unhappy about the impact on the area and how the changes had been implemented. It had resulted in one of the largest number of signatories to a petition that City of York Council had received (approximately 8,000 in total). Local businesses and residents were keen to work with the Council to review the increases in parking charges.
- Gwen Swinburn spoke in relation to agenda item 9, Review of Parking Charges. Reference was made to two separate petitions from the Groves area. Residents and businesses had concerns about unfair parking charges and discriminatory practices, which affected disadvantaged communities. The first petition signed by local businesses and residents objected to significant increases in parking charges, which affected the Groves area. The second petition, which was near completion, provided a business case for a formal traffic impact assessment challenge. It was pointed out that there had been multiple breaches of equalities legislation and inconsistent policy application as well as failures in consultation and legal advice.
- Ruth Phillips spoke as a business owner on Bishopthorpe Road, in relation to agenda item 9, Review of Parking Charges. There was concern about a lack of consultation with local businesses and residents. It was positive that the Council had acknowledged that the consultation had not ensured a sufficient reach and there was a need to work together to establish a meaningful way forward. There was concern that the review had not included data in relation to the impact on congestion and footfall. The only data used related to a 37% reduction in car parking. There was also concern that some of the modelling that had been applied was out of date. In addition, that the increases in parking charges was inconsistent with those applied to similar areas with no affordable options.

- Denise Craghill spoke on behalf of York Green Party in relation to agenda item 9, Review of Parking Charges. There was concern about the impact of increases in parking charges on less affluent shopping parades. It was felt that a one size fits all approach had been applied. The increases in parking charges had a significant impact on local businesses, many of these were already struggling. A more affordable, short-term option was needed. It was suggested that the first 30 minutes were free, which supported local businesses, particularly shopping parades, such as the Groves.
- Councillor Fenton spoke in relation to agenda item 6, Housing Annual Report. The report was welcomed, and housing staff were thanked for their diligence and commitment to support tenants. He also thanked the Executive Member for presenting the draft repairs policy to scrutiny for review. It was hoped that further details about the neighbourhood investment programme was to be shared with scrutiny before it was finalised. In relation to tenant satisfaction, a lack of adequate car parking was highlighted as a concern and a further review of this was recommended. Clarification was needed whether there was potential through the neighbourhood investment programme to address some of these concerns. In relation to agenda item 9, Review of Parking Charges, it was reported on behalf of a local constituent that clarification was sought in relation to parking charges for those attending places of worship. Separately, there was a need for Executive to commit to a review of the parking strategy and work with local businesses and residents to develop it.
- Andrew Lawson spoke on behalf of York BID, in relation to agenda item 9, Review of Parking Charges. It was reported that charges had been applied to approximately 3,500 city centre spaces compared to 6,200 free spaces at retail parks and outer areas. The current approach to parking charges was considered unbalanced. The opportunity to review levels of parking charges was welcomed. There was concern about the impact on local businesses, particularly since local spend had reduced by 3.5%. Local businesses relied on all year-round local trade. The minster badge provided a helpful discount, but it did not cover nearby towns. The BID was keen to work with the Council to analyse data in relation to footfall, local spend and parking income. The BID Board met recently

and was committed to working with the Council to tackle congestion and lower emissions.

- Todd LePage spoke in relation to agenda item 9, Review of Parking Charges. There was concern about the lack of engagement with some communities as part of the process. The sharp increase in parking charges was considered a negative motivator. A different approach was needed with greater levels of consultation and collaboration. A healthy streets audit could be used to better inform local needs and the transition to more sustainable transport. The revised approach needed to be transparent and inclusive.
- Linda Grenyer spoke in relation to agenda item 9, Review of Parking Charges. Reference was made to the updated equality impact assessment which had been submitted. There was concern that the updated equality impact assessment had not been submitted prior to the original decision in February 2025. It was noted that in relation to the original decision, the equality impact assessment had reported a negative impact in relation to all protected characteristics.
- Councillor Waller spoke in relation to agenda item 6, Housing Annual Report and agenda item 7, York Learning Accountability Agreement 2025/26. In relation to agenda item 6, reference was made to the neighbourhood investment programme, which was considered a replacement for the housing environment investment programme. There was some concern that the report did not adequately address the types of support that were needed to support local communities. Clarification was required in relation to where the funds could be used. Previous requirements related to capital spend only, but the current report suggested revenue spend. Walkabouts were useful in identifying solutions to local issues and further details about future arrangements were needed. In relation to agenda item 7, it was highlighted that vocational training needed as much support as possible. Clarification was sought in relation to the timescales for the mayor's inactivity trailblazer fund.

#### **104. Forward Plan**

Members received and noted details of the items that were on the Forward Plan for the next two Executive meetings at the time of agenda publication.



**105. Housing Annual Report**

The Director of Housing and Communities submitted a report which provided the following:

- The context for the social housing sector and the new standards with which the service was measured;
- Current performance levels against a range of standards, which included tenants' perception and compliance data; and
- Priorities and targets for the year, providing an opportunity for Executive and council house tenants to scrutinise performance.

The following information was appended to the report for members' information:

- Responsive Repairs Policy for Tenants of Council Houses
- 2025-26 Capital Investment Programme
- Summary of Priorities for 2025-26
- Tenants Satisfaction Survey Results
- Equalities Impact Assessment.

The following officers attended the meeting and responded to members' questions and comments:

- Pauline Stuchfield, Director of Housing and Communities; and
- Vicky Japes, Head of Housing Strategy and Performance.

Questions and comments were invited and the key areas of discussion were as follows:

- Reference was made to key performance indicators (KPIs) and the need to include more detailed historic data to assess the level of performance across key areas in relation to tenant satisfaction. Officers advised that the report contained information and data to be submitted to the regulator and that this was the first year a report had been produced for this purpose. The findings were to be shared with all housing staff and tenants.
- The Executive Member reported that the report highlighted tangible improvements that had been made in relation to building services and housing management. It was

acknowledged that there had been an increased level of scrutiny by the regulator, which was welcomed. Progress had been made in relation to the level of repairs completed on the first visit, time taken to complete repairs, and the turnaround time for empty properties to re-let. Stock condition surveys had assisted with identifying further work that was required.

**Resolved (unanimously) –**

- a) Noted the current performance levels across the Council's landlord services and the proactive approach to working alongside the Regulator of Social Housing.
- b) Approved the priorities for 2025-26 as highlighted within the report and summarised in Annex C to the report. Noted the related performance targets, seeking to deliver further improvements to the quality of service provided for council house tenants.
- c) Approved the adoption of a new Responsive Repairs Policy for Tenants of Council Houses included in Annex A to the report.
- d) Approved the 2025-26 capital programme contained in Annex B to the report.
- e) Approved the principles of the Neighbourhood Investment Programme (paragraph 23 to the report), allowing the service to respond more effectively to the priorities of council house tenants. Noted that further details will be included in the Neighbourhood Model report to be considered by Executive this summer.

**106. York Learning Accountability Agreement 2025/26**

The Director of Housing and Communities submitted a report which sought approval to submit the accountability statement in relation to the Adult Skills Fund (ASF) grant received by York Learning on an annual basis.

The following information was appended to the report:

- Draft York Learning Accountability Statement 2024/25;  
and

- Equalities Impact Assessment.

The following officers were in attendance to present the report and respond to members' questions and comments:

- Pauline Stuchfield, Director of Housing and Communities; and
- Paul Cliff, Shared Head of Adult Learning and Skills (York and North Yorkshire).

The Executive Member highlighted the need to ensure a good range of opportunities for education and learning. The importance of communities was emphasised. York had some of the most deprived communities and the Council had an important role in ensuring pathways to opportunities.

**Resolved (unanimously)** – That Executive approves the Accountability Statement and Action Plan attached as an annex to the report ahead of publication at the end of June 2025.

**Reason** – For the service to receive funding to deliver against this statement we must gain agreement on contents. This agreement provides a framework for accountability whilst enabling us to receive the necessary funds to deliver the service. The document will also serve as the basis for wider internal conversations that will maximise the potential of learning for our residents.

**107. The York Business Improvement District - Ballot for 2026-2031**

The Director of City Development submitted a report which sought the support of Executive for the York Business Improvement District (BID), in preparation for a ballot in October 2025.

The following information was appended to the report:

- List of streets in York BID geography and map;
- City of York Council Baseline Agreements; and
- Equalities Impact Assessment.

Claire Foale, Chief Strategy Officer attended the meeting to present the report and respond to members' questions and comments:

The Executive Member welcomed the positive work undertaken by York BID, which was valued by the council, businesses, residents and partners. York BID was a robust and critical friend to the council and had an important role in identifying areas where further improvements were required.

**Resolved (unanimously) –**

- a) That Executive supports the Business Improvement District (BID) in their campaign to secure a third term in York through a ballot of all businesses in the BID geography.
- b) Requests that the Leader of the Council casts the Council's ballot votes in support of a further term.
- c) Notes the content of the Council's Baseline Service Level Agreements.
- d) Notes the role of the York BID as a key City partner in supporting the City Centre economy.

**Reason –** To approve the BID in their October 2025 ballot for a third five-year BID term, beginning on 1 April 2026.

(Councillor Kilbane left the meeting at the conclusion of this item).

**108. Review of Parking Charges**

The Director of City Development submitted a report which presented proposals to change car parking charges for approval.

The following information was appended to the report:

- Bishopthorpe Road Petition;
- East Parade Petition;
- Parking Services; and
- Updated Equalities Impact Assessment.

The following officers were in attendance to present the report and respond to members' questions and comments:

- Claire Foale, Chief Strategy Officer; and
- Patrick Looker, Assistant Director of Finance.

The following updates were provided by officers:

- All petitions were to be considered as part of the review, which included those that were still pending.
- A more detailed review was to be undertaken to include information and data on footfall, bus use, car park use, traffic and spend. The consultation was to be extended to include local community groups, business communities and visitor feedback.
- Independent analysis had been undertaken and published for public inspection, from January 2022 to April 2025.

Questions and comments were invited and the main areas of discussion were as follows:

- The need to develop a comprehensive parking strategy to address issues. A more effective consultation process was also required.
- In response, the Executive Member advised that traffic congestion was a key issue which had resulted in daily collisions, essential workers had been delayed and unable to undertake their work properly and lives were put at risk as emergency services were unable to attend to calls quickly. These issues were likely to get worse if not addressed.
- There had been significant investment in sustainable travel and improvements to highways. Raising parking charges was a proven way to tackle congestion with evidence to support its effectiveness.
- Executive had listened to the concerns of businesses and residents and reflected on the feedback provided. It was acknowledged that the budget consultation could have been more far reaching and that there were some areas where the new pricing was considered too much and too soon. The pricing model had been revised using a data led and evidence-based approach.
- It was also acknowledged that there had been significant challenge to the review of parking charges from the Bishopthorpe Road and Micklegate areas and that less vocal communities in other parts of the city such as the Groves, deserved the same level of recognition.

- Executive was committed to working together with local businesses and residents to agree a way forward and develop a constructive relationship to build positive motivators and develop sustainable travel.

**Resolved (unanimously) –**

- a) approves an increase in the discount for the Minster Badge to 30% of the standard parking charge, from the current 24%.

**Reason:** to minimise the impact of parking charges on residents.

- b) maintains existing on-street parking charges on and inside the inner ring road, with the following exception at (c);

**Reason:** to ensure parking charges reflect the costs of congestion and contribute to Local Transport Strategy objectives.

- c) approves the adjusting of charges in the Micklegate and Priory Street area to the ‘outside the inner ring road’ on-street parking rate, rather than its existing higher city centre rate. This will be reviewed in the future. City centre evening parking rates for this area will still apply.

**Reason:** To recognise the anomalously low charges in this area previously, and to allow local business time to adjust to future increases in parking rates.

- d) maintains existing charging at all city centre car parks with the exception of Bishopthorpe Road, which it’s proposed is moved in line with charges approved for community car parks at East Parade and Rowntree Park in the council’s 2025-26 Budget.

- e) approves a standard lower rate outside the inner ring road to apply to on-street parking, matching rates at Bishopthorpe Road, East Parade and Rowntree Park Car Parks.

- f) approves that East Parade Car Park should remain matched to the ‘outer’ on-street local parking rate.

**Reason:** to ensure consistency across out of city centre parking and reflect the role and importance of local shopping areas to York's economy.

- g) removes the proposed charges for dedicated motorcycle bays.

**Reason:** to recognise that the motorcycle bays are generally in locations where a car space is not possible. The charge is also inconsistent with the on-street charge arrangements. This will be reviewed at a later date.

- h) increases the discount for Low Emission vehicle permits to 20%, from the current 16% discount.

**Reason:** to set a discount that better reflects the contribution of all types of vehicles to congestion.

- i) approve that Contract Parking permits are no longer linked to Season Tickets, and will be set at last year's prices, plus circa 5% increase, with a 20% discount for low emission vehicles.

**Reason:** to recognise the unique circumstances of the small number of residents who live within the city walls without access to parking.

- j) to undertake a review and develop a policy position around travel to places of worship.

**Reason:** to ensure consistency of approach and ensure the council is meeting its obligations under the Equalities Act.

- k) should Executive approve a change to the amount paid for the low vehicle emission discount, Contract, Season and ResPark permits holders will be refunded the difference.

**Reason:** so that any change in policy does not adversely affect residents

- l) To note that, if approved, the new charges will need to be advertised in accordance with legislation, meaning those charges implemented will be subject to a pending review

under the Traffic Management Act 2004 Right to Challenge Parking Policies.

**Reason:** to ensure compliance with legislative requirements.

- m) accept the challenge to review parking charges under the Traffic Management Act 2004 in respect of Bishopthorpe Road and initiate the review.

**Reason:** to ensure the council responds to the petitions submitted.

- n) To approve that a further report will be brought back to Executive upon the conclusion of the review.

**Reason:** to set a clear process for carrying out such reviews.

- o) To approve that the parking income budget is not changed at this time, whilst recognising the impact of the proposed changes could be in the region of £115k.
- p) To request that updates on parking usage and income is included in quarterly finance and performance monitoring reports and any variances are considered within the whole council budget.

**Reason:** to ensure the impact on the parking budget is considered and remedial action is taken if necessary.

#### 109. Urgent Business

There were no urgent items of business.

Councillor Douglas, Chair

(The meeting started at 4.30 pm and finished at 6.10 pm).



**Table 1: Items scheduled on the Forward Plan for the Executive Meeting on 2 September 2025**

Title and Description	Author	Portfolio Holder
<p><b>Harewood Whin Green Energy Park – Request to Approve Outline Business Case</b></p> <p>Purpose of Report: The report provides a summary of the Outline Business Case to provide renewable energy from the former landfill site at Harewood Whin and to show how City of York Council, wider York Stakeholders and the Region will benefit from this energy produced.</p> <p>The Executive will be asked to: Approve the content/approach within the Outline Business Case and therefore to approve progression to a Full Business Case. The Full Business Case will prepare the procurement for capital works. We will approach Executive for approval of the Full Business Case in 2026.</p>	<p>Garry Taylor, Director of City Development</p>	<p>Executive Member for Environment and Climate Emergency</p>
<p><b>Murton Neighbourhood Plan</b></p> <p>Purpose of Report: To consider the results of the Murton Neighbourhood Plan referendum, which takes place on Thursday 10 July 2025. Subject to a favourable result of the referendum, it asks Members to formally ‘make’ the Neighbourhood Plan and bring it into full legal force as part of the Development Plan for York. This will allow the Neighbourhood Plan to progress in line with the relevant Neighbourhood Planning legislation and Regulations. The Executive will be asked to formally ‘make’ the Murton Neighbourhood Plan following a successful referendum and bring it into full legal force as part of the Development Plan for York.</p>	<p>Garry Taylor, Director of City Development</p>	<p>Executive Member for Housing, Planning and Safer Communities</p>

**Table 2: Items scheduled on the Forward Plan for the Executive Meeting on 7 October 2025**

Title and Description	Author	Portfolio Holder
<p><b>York's Inclusion and Belonging Special Educational Needs and Alternative Provision Strategy 2025-2030</b></p> <p>Purpose of Report: The executive report for the forward plan for York's Inclusion and Belonging Special Educational Needs and Alternative Provision Strategy 2025-2030, will set out York's Education, Health and Care strategic priorities and actions to improve the lived experience for children and young people and their families.</p> <p>The Executive/ will be asked to approve the York Inclusion and Belonging Special Educational Needs and Alternative Provision Strategy 2025 to 2030.</p>	<p>Martin Kelly, Corporate Director of Children and Education</p>	<p>Executive Member for Children, Young People and Education</p>



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15 July 2025
<b>Report of:</b>	Director of Public Health
<b>Portfolio of:</b>	Executive Member for Health, Wellbeing and Adult Social Care

## **Decision Report: Strengthening York's Support for Drug and Alcohol Recovery**

### **Subject of Report**

1. Drugs and alcohol continue to present major issues for health and wellbeing in York. They lead to early illness and death, and in fact are the two leading causes of death in York for those between the ages of 15 and 49. They give rise to thousands of hospital admissions a year, worsen or lead to the onset of mental health conditions, and precipitate a large range of consequent physical health issues.
2. They also present a city issue, and interact considerably with significant issues around housing, criminal justice, community cohesion, employment and safety, holding people back from living thriving and empowered lives.
3. Nationally, the approach to supporting people with drug and alcohol issues has developed significantly over the last decades, from a sole emphasis on treatment and clinical services, such as substitution therapy, to a much greater focus on recovery.
4. This report focuses on the next steps needed to strength York's community recovery model, in line with council plan aspirations, and recommends to Executive a number of actions the council can take to further these aims and improve the lives of people affected by addictions in our city.

## **Benefits and Challenges**

5. The benefits of a strengthened recovery system in York are numerous, including improved health for residents, employability outcomes, improved community cohesion, reduced health and care services use.
6. In terms of the decisions Executive are presented with in this paper, there are several direct benefits. The establishment of a Community Recovery Hub at Wellington row will utilise an external grant to leverage in community resources into a CYC building, providing a vibrant recovery-oriented facility in the heart of the city. The endorsement of the Inclusive Recovery Cities initiative will show strong council commitment to this movement to make recovery accessible and sustainable for more people and send a strong signal that people in recovery in our city have civic backing right behind them on their journey.
7. The challenge is, perhaps, that building and sustaining a strong recovery community locally will not always happen in a stepwise fashion, may encounter setbacks and 'bumps along the road' and requires the right conditions to be in place over the long term. The council has a role to play – although not the only or even the most prominent role, which belongs to the community themselves – in making this happen, and needs to show sustained commitment to this agenda, including anti-stigma and visible recovery commitments, in its future work.

## **Policy Basis for Decision**

8. The Council Plan 2023-2027 has a commitment to 'Support more people on their journey of recovery from addiction, including through smoking cessation services and our recovery-based drug and alcohol model.'

## **Financial Strategy Implications**

9. There are no direct financial implications involved in endorsing the Inclusive Recovery Cities initiative. The council may on occasion be asked to contribute, along with partners, to events or meetings relating to the initiative, most of which will be held at no cost or cost-in-kind from supporting organisations. Where small amounts

are required from the council to host e.g. a public event, this resource will come from the Public Health grant.

10. The financial resources which cover the lease and utilities for the Community Recovery Hub at Wellington Row come from existing grant money CYC holds, originating from a Public Health England grant given to CYC which has until recently been held by the former treatment provider (Changing Lives). No new CYC resource is needed to contract for this provision over the next 3 years, however after that point the project will need to sustain itself through other forms of grant / community funding, a situation which is in line with the journey described below where council provides strong up-front resource for this project initially, but moves into a supportive partner role towards the end of the contract term.

## Recommendation and Reasons

11. Executive are asked to:

Note the decision taken by the Director of Public Health through officer delegation to award a contract to York in Recovery CIC of the value £202,000 to lease and manage the Community Recovery Hub for a period of 3 years

*Reason: to enable the provision of a dedicated recovery space in the city*

Express the council's commitment to the Inclusive Recovery Cities approach and York's Inclusive Recovery City Vision statement, and delegate to the Director of Public Health and Executive Member for Health, Wellbeing and Adult Social Care to explore and monitor any areas for improvement within council business and formally sign the Inclusive Recovery City Vision Statement for York on behalf of the council.

*Reason: to ensure the council leads by example in its approach to promoting recovery and making it easy for people with substance use disorders to seek help, for example in communications and people management policy and practices, and clear civic support is given to the Inclusive Recovery City approach in York*

## Background

12. From poor-quality sleep to high blood pressure, anxiety and cancer, the wide-ranging impacts of alcohol affect so many of us. This is a matter of life and death too; people are dying before their time because of harms related to alcohol or other substances.
13. Although many of the levers around reducing substance-related harm are around higher standards for how alcohol is promoted and sold, curbing the supply of illicit drugs, and empowering the next generation with resilience / critical life skills and a sense of belonging in society, it's also important to ensure people with substance use disorders are supported to access quality treatment. This includes challenging stigma around drug and alcohol problems, making recovery from substance use disorders visible in the city and facilitating peer support to sustain ongoing recovery.
14. This report outlines key next steps to strength York's support for recovery from substance use disorders, in line with council plan aspirations, and recommends to Executive a number of actions the council can take to further these aims and improve the lives of people in our city.
15. The principle behind recovery is that a human's journey out of addiction is much more likely to be successful if they are part of a strong recovery community, which emphasises connection, a new recovery-based social life and as well as empowerment.
16. As Professor David Best (Leeds Trinity University) puts it:

*This process is unique to every individual, but in general it could be regarded as a non-linear, gradual, multidimensional process that involves growth in connectedness, hope, positive identity, meaning and empowerment. Recovery does however not happen in a vacuum. Instead, it should be considered as a social process of community integration.<sup>1</sup>*

---

<sup>1</sup> <https://www.tandfonline.com/doi/full/10.1080/16066359.2018.1520223#abstract>

17. In York these community connections have been going for many years, with pop-up cafes, meetings, activities, support and social events happening most days of the week. Organisations including SMART UK, Alcoholic Anonymous, Narcotics Anonymous, Cocaine Anonymous, York in Recovery, Lived Insights, as well as charities such as Chocolate & Co and the treatment providers Change Grow Live and Emerging Futures, facilitate a vibrant recovery community in York involving many thousands of people.
18. It is often said that ‘few people can walk the recovery journey alone’, and this is why investing in strong supportive structures a well-functioning recovery system are so crucial.
19. It is clear this approach has huge benefits for the individual, but it also has wider benefits to society. Estimates for the social and economic costs of alcohol related harm amount to £21.5bn, while harm from illicit drug use costs £10.7bn. These include costs associated with deaths, the NHS, crime and, in the case of alcohol, lost productivity. In York alone, it is estimated that alcohol’s economic burden on society is at least £91.7m, including NSH costs of £18.2m, Crime and Disorder costs of £45.9m, wider economy costs of £20.1m, and social services costs of £7.5m

### *Inclusive Recovery Cities*

20. The Inclusive Recovery Cities movement is an international initiative championed by Professor David Best. It has been adopted by cities in many different parts of the world, including in Europe, North America, South Africa, Australia and New Zealand. Closer to home, Middlesbrough became the first official Inclusive Recovery City in 2024.
21. An Inclusive Recovery City is a place that:
  - Makes recovery visible, giving hope to those currently experiencing substance use problems and providing ongoing support to those who are in recovery from substance use disorders
  - Challenges the stigma which can stop people coming forward for help, contributing to further harm, including as serious as death, for those with substance use disorders

- Champions multiple pathways to recovery from substance use disorders
- Recognises that through doing this, the whole city will benefit.

22. Professor David Best, the Founder of the international Inclusive Recovery Cities movement, introduces the need to work as a city to make recovery visible as follows:

*Every town or city high street contains messages about 2-4-1 drinks offers or e-cigarette products that play a proactive and visible role in the development of addictive behaviours and illnesses. The in-built stigma surrounding addictions causes isolation and often a loss of jobs and homes. But when somebody succumbs to the harms we perpetuate, far too often there is a tendency to close our eyes and hope the 'problem' goes away. Inevitably, unless we make recovery visible, the problem will just get bigger and bigger. Visible recovery creates a ripple effect, collective efficacy and trust and engagement between citizens that enable communities to thrive from their roots.<sup>2</sup>*

23. Work towards becoming an Inclusive Recovery City requires “both a ‘top-down’ and a ‘bottom-up’ process, where strategic engagement combines with grass roots activity and energy to coordinate engagement and impact at a city level”. Key aspects include:

- Creation of a local Inclusive Recovery City steering group and mission/vision statement
- High-level understanding and commitment to the local IRC Vision Statement (see Annexe A, ‘A vision for York as an Inclusive Recovery City’)
- An audit of existing assets and resources that IRC movement can build on
- Development of an activity plan (at least 4 events per year) and a communications plan
- Development of a monitoring and evaluation plan to review progress and inform ongoing changes – Initial focus on activities but the longer-term outcomes to assess include visibility and

---

<sup>2</sup> <https://www.citymonitor.ai/analysis/inclusive-recovery-city/?cf-view&cf-closed>



awareness of the recovery community, stigma and social distance, connectedness within the recovery community and into the wider community.

- Involvement at a national level in recovery movements for change.
24. However, the process of becoming an Inclusive Recovery City is not one-size-fits-all process, and crucially, it is not an 'accolade' the council signs up for or achieves. It relates to the whole community, and members are today being asked to commit to the approach as one partner amongst many.
  25. On the 20<sup>th</sup> of June 2024, the York Drug and Alcohol Partnership Board discussed and endorsed the proposal brought forward by our local Lived Experience Recovery Organisation ('LERO'), York in Recovery, that as a city we should work towards the ethos and practical outworking of being an Inclusive Recovery City.
  26. A small steering group led by York in Recovery and City of York Council Public Health have agreed a local 'vision statement' to define and guide York's progress to being an Inclusive Recovery City (Annexe A)
  27. Practically, members are being asked to:
    - a) Approve commitment to the local statement
    - b) Delegate the Director of Public Health and Executive Member for Health, Wellbeing and Adult Social Care to explore and monitor any areas for improvement within council business, such as such as the adoption of planned guidance on communications relating to alcohol and drugs
    - c) Delegate to the Director of Public Health and Executive Member for Health, Wellbeing and Adult Social Care to sign the local Inclusive Recovery City statement on behalf of the council, together with many other partners, in a future signing event likely to happen in 2026.

### *Establishment of the York Community Recovery Hub*

28. The journey to becoming an Inclusive Recovery City involves many factors, including culture, policy, people, services and events, but it also will include the recently opened York Community Recovery Hub on Wellington Row. This is a key physical destination we are hoping for people in York who use substances will start to call 'home' on their journey into long term recovery from addiction.

29. CYC holds a historic grant given to the council by the (now abolished) Public Health England in order to bring a building into use for the purposes of recovery activity in York. This funding was granted out to the previous provider of drug and alcohol services in the city and returned to CYC at the end of that provider's contract for the drug and alcohol treatment service in 2024.
30. Since 2023, the public health team have been actively working with a number of recovery organisations in the city to finally bring this physical provision of services into being, under the vision of a 'Community Recovery Hub'.
31. This 'hub' has been birthed out of two coproduction events held in May 2023 and September 2024, attended by a large number of partners and people with lived experience. The recovery community have also hosted continuous discussions which have shaped the plans across the past few years.
32. Whilst there have been and continue to be various activities taking place around recovery in the city they have never had a home to develop and grow. A pilot of how a Community Recovery Hub could work took place 18 months ago, and the opportunity has now come to use the remaining grant monies for a longer-term lease, at The Hub, Wellington Row. This building is a CYC asset on our commercial property list.
33. To ensure the recovery community is at the heart of the activity intended to run from this building – rather than it being a site for the delivery of council services – the Community Recovery Hub project needs a partner to take the lease for the building, in agreement with CYC Property Services, and manage a schedule of activities and operations from the building, in line with an agreed project specification.
34. To this end, the council's public health team have worked with Property Services, Procurement and Legal colleagues and are following the council's own Contract Procedure Rules (as dated Nov.2023) which include provisions for the award grants through a competitive grants process unless it isn't Best Value to do so, and therefore a waiver form request of CPR 4.5 has been submitted to request approval to issue grant funding worth £202,000 to the lived experience organisation York in Recovery, following a market engagement exercise demonstrating them as the only interested

party in delivering such a project, and following a due diligence process.

35. This Grant Award will cover the lease of the building as well as utilities, will last for an initial 3 years, and will be awarded under a waiver of Contract Procedure Rule 4.5. The request to waive CPR 4.5. is pursuant to CPR 26 – Waivers and Exemptions where the circumstances are certified by the Monitoring Officer and Head of Procurement as meeting the following criteria:

*CPR 26.2.10 where officers from Finance, Commercial Procurement and/or Legal are satisfied that there is a significant risk to the statutory functions of the Council, or to its governance, audit or finances, a significant safeguarding risk, or a significant risk of failure in the case of an immediate statutory inspection, if the Supplier is not engaged (such confirmation in all cases to be confirmed in writing by the relevant Chief Officer).*

36. This Grant Award falls under the value which can be approved under delegated officer decision making, so members are asked to Note the decision taken by the Director of Public Health through officer delegation to award a contract to York in Recovery CIC of the value £202,000 to lease and manage the Community Recovery Hub for a period of 3 years.

## **Consultation Analysis**

37. The recommendation to express the council's commitment to the Inclusive Recovery Cities approach and York's Inclusive Recovery City Vision statement is based on work led by the recovery community locally, and members of the community brought the proposal to the York Drug and Alcohol Partnership for statutory partners to consider. Partners, in the main part those with lived experience, have formed a steering group to progress the plans.
38. The Community Recovery Hub concept was coproduced through two whole-system workshops, and is now led by a coordination group involving representatives with lived experience from a number of recovery organisations in York.
39. There has been engagement with the local community in the Micklegate ward and surrounding areas where the Community Recovery Hub will be sited, through individual meetings, invitations

to two open days, and other communications on plans. Local businesses have kindly assisted with the decoration of the hub.

## Organisational Impact and Implications

- ***Financial***

The Full budget envelope of £202,000 is available from the Recovery Fund reserve and as does not include any inflationary measures for the 3 years and therefore is consider affordable.

- ***Human Resources (HR)***

There are no direct Human Resources Implications of this report.

- ***Legal***

With regards to the Grant Award for the Community Recovery Hub at Wellington Row, Legal Services must carry out a full assessment of the proposed grant funding arrangement before any agreements are entered into with York In Recovery, to ensure compliance with the Subsidy Control Act 2022, as well as Rules 5(f) and 5(g) the Council's Financial Regulations under Appendix 10a of the Council's Constitution (the "**Council's Financial Regs**") and Rules 4 and 26.2.10 of the Council's Contract Procedure Rules under Appendix 11 of the Council's Constitution (the "**Council's CPRs**")]

In addition to the above, Legal Services must be consulted with to advise upon the drafting of the grant funding agreement, and the propose lease at the building, the grant funding agreement and building lease must be drafted and concluded with input from Legal Services to ensure compliance with the Council's CPRs, the Councils Financial Regs, and the Subsidy Control Act 2022 and to ensure that any rules or conditions originally imposed by Public Health England on the use of this funding are adhered to. Any grant funding agreement and lease entered into will have no procurement law implications under the Council's CPRs and (where applicable) the Procurement Act 2023. However, the Council cannot elect to award a Grant where the sole purpose for doing so would be to avoid conducting a competitive tender process in accordance with the Council's CPRs and (where

applicable) the Procurement Act 2023. Further advice must be sought from Legal Service where necessary.

- ***Procurement***

The current legislation for public sector procurement “Procurement Act 2023” doesn’t include any specific provisions relating to the award of Grants but the Act does emphasise transparency, fairness, and value for money in procurement processes, applicable to both contracts and grants.

This Strengthening York’s Support for Drug and Alcohol Recovery decision report confirms that a market engagement event was previously held where the provider York in Recovery were identified as the only suitable provider and was also following a due diligence process. This evidenced that the suitable market of providers was invited and engaged and there was only one provider deemed suitable for the award of this Grant of £202,000 to lease and manage the Community Recovery Hub for a period of 3 years. Therefore, the requirements of the Procurement Act 2023 on transparency, fairness, and value for money applicable to grants have been complied with and can be justified by the market engagement and compliance with the council’s rules and governance of decisions to obtain the necessary approvals to direct award this grant to York in Recovery.

Therefore, this direct Grant Award of £202,000 to York in Recovery will cover the grant funding agreement and the lease of the building as well as utilities, will last for an initial 3 years, and will be awarded under a waiver of Contract Procedure Rule 4.5. The request to waiver CPR 4.5. is pursuant to CPR 26 – Waivers and Exemptions where the circumstances are certified by the Monitoring Officer and Head of Procurement as meeting the following criteria:

*CPR 26.2.10 “where officers from Finance, Commercial Procurement and/or Legal are satisfied that there is a significant risk to the statutory functions of the Council, or to its governance, audit or finances, a significant safeguarding risk, or a significant risk of failure in the case of an immediate statutory inspection, if the Supplier is not engaged (such confirmation in all cases to be confirmed in writing by the relevant Chief Officer)”*

This contract falls under the value which can be approved under delegated officer decision making.

- ***Health and Wellbeing***

The establishment of a Community Recovery Hub, and the endorsement of the Inclusive Recovery Cities approach, is in line with the health and Wellbeing Strategy and will lead to improved health and reduction in health inequalities for some of the city's most vulnerable residents.

- ***Environment and Climate action***

The Climate Change team within City of York Council will support the ongoing decarbonisation of council buildings, including the new Community Recovery Hub.

- ***Affordability***

Supporting recovery from drug and alcohol addiction has a positive effect on financial inclusion and support in the city.

- ***Equalities and Human Rights***

An EIA for this work is included at Annex B.

- ***Data Protection and Privacy***

The data protection impact assessment (DPIAs) screening questions were completed for the recommendations and options in this report and as there will be no personal, special categories or criminal offence data being processed, there is no requirement to complete a DPIA.

- ***Communications***

The council's communications team support public health with a wide range of projects, and will partner with community recovery organisations on work to communicate the vision of inclusive recovery cities and the ongoing resource of the Community Recovery Hub

- ***Economy***

Recovery work offer positive opportunities for getting people into volunteering and other employment opportunities, and will benefit the economy in this way.

## **Risks and Mitigations**

40. The progress noted in this report towards building an integrated recovery-oriented system in York offers the city an opportunity to reduce the risk and harms of addiction. In giving council support to the provision of a physical building for recovery activities, and in endorsing the Inclusive Recovery Cities approach, members would be positively impacting and mitigating these risks.
41. There are a number of risks associated with the leasing of any property, which are mitigated through close working with the leaseholder, good work to build up community relations and positive perceptions / anti-stigma work of the venture, and the contractual terms which will cover the agreement with the provider.

## **Wards Impacted**

42. This report covers all wards in York. The Community Recovery Hub is sited within Micklegate ward, and the paper details the consultation and engagement process with local residents and businesses.

## **Contact details**

For further information please contact the authors of this Decision Report.

### **Author**

<b>Name:</b>	Ruth Hine
<b>Job Title:</b>	Public Health Specialist Practitioner Advanced
<b>Service Area:</b>	Public Health
<b>Telephone:</b>	
<b>Report approved:</b>	Yes
<b>Date:</b>	18/03/2025

<b>Name:</b>	Peter Roderick
<b>Job Title:</b>	Director of Public Health
<b>Service Area:</b>	Public Health
<b>Telephone:</b>	07511160283
<b>Date:</b>	18/03/2025

## **Annexes**

Annex A – IRC Vision Statement

Annex B – Equalities Impact Assessment



## **A vision for York as an Inclusive Recovery City**

York, as an Inclusive Recovery City, wants every individual to have the acceptance and resources to thrive after experiencing problems with drugs and alcohol or other addictions.

We are committed to removing stigma by connecting people, building good relationships and celebrating every recovery journey. Together, we're building a city where recovery from addiction problems is visible, valued, and accessible for all.

As York's businesses and major employers, educational institutions, statutory services and community groups, we collaborate to create a city that strengthens and empowers people on their recovery journeys through social networks, safe housing, benefits advice, meaningful activities and pathways to volunteer opportunities and employment. Workplaces and media narratives will encourage people to seek treatment and support with dignity.

### **We want York to be a place where:**

- Treatment and recovery support services and groups are available and accessible to all across our diverse community.
- Every family knows where to find help for substance use disorders or other addictions free of charge, both for the person directly affected and for the wider family.
- Our workplaces, VCFSE organisations and statutory services raise awareness of and facilitate access to support needed by people with addictions, and are sensitive to the needs of people in recovery.
- Our hospitality businesses and other local organisations create fun environments and activities for alcohol-free socialising and connection.
- People in recovery, together with their family, friends and colleagues, proudly present hope to others and celebrate recovery through major city events such as the Dragon Boat Race, Christmas Market, York Pride, Aesthetica etc
- Our local media ensures that any story touching substance use disorders or other addictions creates understanding of the conditions and the range of treatment and support available so that fear and stigma can be replaced by kindness and support.
- Our universities and schools help young people know they are not alone, not the cause or cure of their parents' problems and get the support they need, whether that's around their own or someone else's substance use.
- People with a history of a substance use disorder or other addiction are welcomed into employment and volunteering opportunities based on their individual suitability, as anyone should be.

\*VCFSE: voluntary, community, faith and social enterprise organisations

This page is intentionally left blank

**City of York Council**  
**Equalities Impact Assessment**

**Who is submitting the proposal?**

<b>Directorate:</b>		Public Health	
<b>Service Area:</b>		Drugs and Alcohol	
<b>Name of the proposal :</b>		Strengthening York’s Support for Drug and Alcohol Recovery	
<b>Lead officer:</b>		Ruth Hine	
<b>Date assessment completed:</b>		04/05/25	
<b>Names of those who contributed to the assessment :</b>			
<b>Name</b>	<b>Job title</b>	<b>Organisation</b>	<b>Area of expertise</b>
Ruth Hine	Public Health Specialist Practitioner Advanced	CYC	Public Health
Peter Roderick	Director of Public Health	CYC	Public Health

## Step 1 – Aims and intended outcomes

1.1	<b>What is the purpose of the proposal?</b> Please explain your proposal in Plain English avoiding acronyms and jargon.
	<p>To set out how the council will support the Community Recovery Hub at Wellington Row for residents with drug and alcohol issues, including the financial and contracting arrangements and the purpose of the hub</p> <p>To Set out how the council will further support the Recovery Movement in the city by endorsing the principles of the Inclusive Recovery City initiative</p>
1.2	<b>Are there any external considerations?</b> (Legislation/government directive/codes of practice etc.)
	<p>The National Drugs Strategy (From Harm to Hope)</p>
1.3	<b>Who are the stakeholders and what are their interests?</b>
	<p>The Recovery community in York including anyone in recovery from an addiction to substances including alcohol. There are a number of formal and informal groups in this area including but not limited to SMART UK, Alcoholic Anonymous, Narcotics Anonymous, Cocaine Anonymous, York in Recovery, Lived Insights, as well as charities such as Chocolate &amp; Co and the treatment providers Change Grow Live and Emerging Futures</p>

<b>1.4</b>	<b>What results/outcomes do we want to achieve and for whom?</b> This section should explain what outcomes you want to achieve for service users, staff and/or the wider community. Demonstrate how the proposal links to the Council Plan (2019- 2023) and other corporate strategies and plans.
	<p>Through this work and the wider Drugs and Alcohol Action Plan, we want to reduce harm in the city from drugs and alcohol through supporting more people to identify need and seek help, receive high quality treatment, and move into recovery which is sustained. It is estimated that nearly 4,000 people in York may have a need for treatment due to drug or alcohol use, although only around 20% are in treatment at any one time.</p> <p>The Council Plan 2023-2027 has a commitment to ‘Support more people on their journey of recovery from addiction, including through smoking cessation services and our recovery-based drug and alcohol model.’</p>

## Step 2 – Gathering the information and feedback

<b>2.1</b>	<b>What sources of data, evidence and consultation feedback do we have to help us understand the impact of the proposal on equality rights and human rights?</b> Please consider a range of sources, including: consultation exercises, surveys, feedback from staff, stakeholders, participants, research reports, the views of equality groups, as well your own experience of working in this area etc.	
	<b>Source of data/supporting evidence</b>	<b>Reason for using</b>
	<a href="#">Drug and Alcohol Needs Assessment</a>	Background data on the population and health needs
	<a href="#">Insights from lived experience to inform the vision for York’s Drug and Alcohol Strategy</a>	Extensive insight into people’s experiences around substances which shapes the work of the Drugs and Alcohol Partnership

<b>Youth Insight Survey 2025</b>	
<b>Co production workshops</b>	2x workshops with service users to shape the Recovery Hub offer, this builds on many years of coproduction work around recovery dating back to 2013
<b>Collaboration through the Community Recovery Hub Steering Group and the Inclusive Recovery Cities Steering group</b>	Formal groups
<b>Engagement with other cities, particularly Leeds and Middlesbrough</b>	Insight into similar Recovery hub models

### Step 3 – Gaps in data and knowledge

<b>3.1</b>	<b>What are the main gaps in information and understanding of the impact of your proposal? Please indicate how any gaps will be dealt with.</b>	
<b>Gaps in data or knowledge</b>		<b>Action to deal with this</b>
Full evaluation of the Recovery hub principle		Ongoing lived experience work Activity data as part of monitoring the grant agreement
Full evaluation of the Inclusive Recovery Cities		Ongoing lived experience work Engagement with academics e.g. David Best as more cities become Inclusive Recovery Cities to understand impact and best practice

### Step 4 – Analysing the impacts or effects.

<b>4.1</b>	<b>Please consider what the evidence tells you about the likely impact (positive or negative) on people sharing a protected characteristic, i.e. how significant could the impacts be if we did not make any</b>
------------	--

	<b>adjustments?</b> Remember the duty is also positive – so please identify where the proposal offers opportunities to promote equality and/or foster good relations.		
<b>Equality Groups and Human Rights.</b>	<b>Key Findings/Impacts</b>	<b>Positive (+) Negative (-) Neutral (0)</b>	<b>High (H) Medium (M) Low (L)</b>
<b>Age</b>	The broad trends suggest that opiates and alcohol use are more prevalent amongst older adults and novel substances and non opiates eg Ketamine, cocaine, MDMA affect younger users. However the overall impact of high quality recovery work will be similar across the age bands	+	M
<b>Disability</b>	Whilst there are no direct impacts of this proposal on disabled people specifically, because these initiatives are intended to foster a culture of inclusion it is anticipated that positive effects will be felt for this group	0	L
<b>Gender</b>	Treatment services have in the past struggled to engage females as much as males, with poor identification of addiction issues and higher levels of stigma explaining some of this variation. Recovery work in the city will need to directly address this imbalance through accessible services and, at times, women-only provision.	+  <b>If mitigations in place</b>  -  <b>If no mitigations are made</b>	M
<b>Gender Reassignment</b>	Whilst there are no direct impacts of this proposal on people who have had gender reassignment specifically, because	0	L

	these initiatives are intended to foster a culture of inclusion it is anticipated that positive effects will be felt for this group		
<b>Marriage and civil partnership</b>	Whilst there are no direct impacts of this proposal people related to their marital status specifically, because these initiatives are intended to foster a culture of inclusion it is anticipated that positive effects will be felt for this group	<b>0</b>	<b>L</b>
<b>Pregnancy and maternity</b>	Whilst there are no direct impacts of this proposal on pregnant people specifically, because these initiatives are intended to foster a culture of inclusion it is anticipated that positive effects will be felt for this group	<b>0</b>	<b>L</b>
<b>Race</b>	Racial inequality exists within health outcomes for those with addictions, as noted by the UK Addiction Treatment Centres:  'black communities in Britain are both the most vulnerable to addiction and have the lowest access to support services. There are various reasons for this disparity in addiction and treatment statistics in black communities, such as socioeconomic factors and the availability of addiction treatment services.' ( <a href="#">Black communities among most vulnerable to addiction, with lowest support   UKAT blog</a> )	<b>+</b>  <b>If mitigations in place</b>  <b>-</b>  <b>If no mitigations are made</b>	<b>M</b>
<b>Religion and belief</b>	Whilst there are no direct impacts of this proposal on people specifically due to their religion or belief, because these initiatives are intended to foster a culture of inclusion it is anticipated that positive effects will be felt for this group	<b>0</b>	<b>L</b>



<b>Sexual orientation</b>	Whilst there are no direct impacts of this proposal on people due to their sexual orientation specifically, because these initiatives are intended to foster a culture of inclusion it is anticipated that positive effects will be felt for this group	<b>0</b>	<b>L</b>
<b>Other Socio-economic groups including :</b>	<b>Could other socio-economic groups be affected e.g. carers, ex-offenders, low incomes?</b>		
<b>Carer</b>	Existing recovery work is very open and supportive of people who have lived experience of caring for someone with addictions, and significant work in the city e.g. York Carers Centre programme has linked in with recovery groups such as those proposed to operate out of the Recovery Hub	<b>+</b>	<b>M</b>
<b>Low income groups</b>	Addictions are a major cause of financial breakdown and poverty. By moving people into recovery, we anticipate that lower income groups will be positively affected the most.	<b>+</b>	<b>M</b>
<b>Veterans, Armed Forces Community</b>	Veterans and those from the armed forces community have much higher rate of substances use disorder / addiction issues, and are well represented within the recovery community, so this work will positively improve their lives	<b>+</b>	<b>M</b>
<b>Other</b>			
<b>Impact on human rights:</b>			
List any human rights impacted.			

**Use the following guidance to inform your responses:**

Indicate:

- Where you think that the proposal could have a POSITIVE impact on any of the equality groups like promoting equality and equal opportunities or improving relations within equality groups
- Where you think that the proposal could have a NEGATIVE impact on any of the equality groups, i.e. it could disadvantage them
- Where you think that this proposal has a NEUTRAL effect on any of the equality groups listed below i.e. it has no effect currently on equality groups.

It is important to remember that a proposal may be highly relevant to one aspect of equality and not relevant to another.

<b>High impact</b> (The proposal or process is very equality relevant)	There is significant potential for or evidence of adverse impact The proposal is institution wide or public facing The proposal has consequences for or affects significant numbers of people The proposal has the potential to make a significant contribution to promoting equality and the exercise of human rights.
<b>Medium impact</b> (The proposal or process is somewhat equality relevant)	There is some evidence to suggest potential for or evidence of adverse impact The proposal is institution wide or across services, but mainly internal The proposal has consequences for or affects some people The proposal has the potential to make a contribution to promoting equality and the exercise of human rights
<b>Low impact</b> (The proposal or process might be equality relevant)	There is little evidence to suggest that the proposal could result in adverse impact The proposal operates in a limited way The proposal has consequences for or affects few people The proposal may have the potential to contribute to promoting equality and the exercise of human rights

## Step 5 - Mitigating adverse impacts and maximising positive impacts

5.1	<b>Based on your findings, explain ways you plan to mitigate any unlawful prohibited conduct or unwanted adverse impact. Where positive impacts have been identified, what is been done to optimise opportunities to advance equality or foster good relations?</b>
	<p>There are a number of groups within the community who, when suffering from addiction issues, experience poorer outcomes including less engagement access to services and compounding discrimination and stigma. Whilst on the whole these proposals will have many positive impacts from an inequalities point of view, extra effort will need to be made by statutory services and by the recovery community itself to reach, involve and include some groups, including females, minoritised ethnic communities, and veterans. This could include bespoke activities and sessions, dissemination of materials advertising events, and clear policies on discrimination and equalities to guide behaviours around the hub.</p>

## Step 6 – Recommendations and conclusions of the assessment

6.1	<b>Having considered the potential or actual impacts you should be in a position to make an informed judgement on what should be done. In all cases, document your reasoning that justifies your decision. There are four main options you can take:</b>
	<ul style="list-style-type: none"> <li>- <b>No major change to the proposal</b> – the EIA demonstrates the proposal is robust. There is no potential for unlawful discrimination or adverse impact and you have taken all opportunities to advance equality and foster good relations, subject to continuing monitor and review.</li> </ul>

- **Adjust the proposal** – the EIA identifies potential problems or missed opportunities. This involves taking steps to remove any barriers, to better advance quality or to foster good relations.
- **Continue with the proposal** (despite the potential for adverse impact) – you should clearly set out the justifications for doing this and how you believe the decision is compatible with our obligations under the duty
- **Stop and remove the proposal** – if there are adverse effects that are not justified and cannot be mitigated, you should consider stopping the proposal altogether. If a proposal leads to unlawful discrimination it should be removed or changed.

**Important:** If there are any adverse impacts you cannot mitigate, please provide a compelling reason in the justification column.

Option selected	Conclusions/justification
<b>No major change to the proposal</b>	<p>We believe that this proposal has positive equalities benefits in a number of areas, and the EIA identifies potential negatives which can be mitigated and turned into positives.</p>

## Step 7 – Summary of agreed actions resulting from the assessment

7.1 What action, by whom, will be undertaken as a result of the impact assessment.			
Impact/issue	Action to be taken	Person responsible	Timescale
Policy	Work with York in Recovery and other community groups to ensure adequate equalities policies are in place	Ruth Hine	Ongoing
Access	Work with York in Recovery and other community groups to ensure that the Community recovery Hub is accessible to all and a range of groups can access and use the building	Ruth Hine	Ongoing

## Step 8 - Monitor, review and improve

8. 1	<b>How will the impact of your proposal be monitored and improved upon going forward?</b> Consider how will you identify the impact of activities on protected characteristics and other marginalised groups going forward? How will any learning and enhancements be capitalised on and embedded?
	Recovery Hub user surveys Future co-production / lived experience insight work Change Grow Live contract monitoring e.g. quality reports

--	--





<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15/07/2025
<b>Report of:</b>	Debbie Mitchell Director of Finance
<b>Portfolio of:</b>	Councillor Katie Lomas, Executive Member for Finance, Performance, Major Projects, Human Rights, Equality & Inclusion

## 2024/25 Finance and Performance Outturn

### Subject of Report

1. This report provides a year end analysis of the overall finance and performance position for the year. This is the final report covering the financial year 2024/25.
2. There have been reports to the Executive throughout the year that have outlined an improved financial position compared to 2023/24 however one that continues to be challenging as a £2.6m overspend was projected in the Monitor 3 report in January. This was after the use of £1.1m from earmarked reserves.
3. This report provides detail that there was a budget overspend of £1.123m which has been funded from the use of contingency £576k and through the use of £547k draw down from earmarked reserves. This has been an improvement of £3.2m from the position forecast at Monitor 3 report.
4. There has been no need to draw on general reserves which stand at £7.4m.
5. The outturn position shows that most areas of the council are now broadly in budget, and it is very pleasing following significant hard work within the service that Children's social care has been reducing its overspend through the year. The key area that required continued

focus is Adult Social Care where the overspend of £4.1m is putting pressure on the council's overall position.

6. As outlined in previous reports, the existing cost control measures remain in place, and further action is needed to bring spending down to an affordable level over the medium term, to safeguard the Council's financial resilience and stability. The impact that this work is having can be clearly seen in this outturn position and the Council's track record of delivering savings, along with robust financial management, provides a sound platform to continue to be able to deal with future challenges.
7. Local government continues to be in challenging times, with worsening performance in a number of sectors nationally. The majority of performance indicators chosen to support and monitor the Council Plan in York, continue to show a generally positive and stable trend against this difficult financial picture and shows the hard work from staff, partners and the city to tackle these challenges.
8. Council Plan Progress Reports, providing an update of activity against each of the plan's seven priorities, will be published on an annual basis and sit alongside a six-monthly snapshot of progress available on the Council's website (<https://www.york.gov.uk/council-plan-1/snapshot-progress-council-plan/5>). The reports complement the Finance and Performance Monitor, providing a narrative for the steps that the Council is taking to meet its ambitions.
9. The Council Plan basket of supporting set of indicators are the high-level measurable element of our performance framework, at a Council operational and City Outcomes level, and in newly available data up to 2024-25 there has been positive performance in areas such as;
10. The number of **households with children in temporary accommodation** continues to be lower than previous years; there has been a decrease, in York, in the **gap between disadvantaged pupils and their peers** achieving 9-4 in English and Maths at KS4; there has been a significant increase in the **% of adults that are physically active** in York and a corresponding significant decrease in the % of adults who are physically inactive with York having the 6th highest physical activity rate and the lowest physical inactivity rate in England (out of 296 Districts and Unitary Authorities).
11. The National Adult Social Care survey has been released and show that there has been an increase in York in the **% of people who use**

**services who have control over their daily life** at a rate higher than the national average; recently released qualification data has shown us that there have been increases in the **% of working age people in York qualified to at least L2/4** and these figures are considerably higher than both national and regional averages; the number of people whom are **eligible and taking a free school meal** has increased in both the primary and secondary sectors.

12. There has been a very positive direction of travel over the last two years in the **air quality measured across three areas of the city**; the latest council **Talkabout survey** has seen positive responses from residents in satisfaction with their local area and increases in residents who give unpaid help to groups or clubs; **city centre performance measures** continue to perform well with high customer footfall and low shop vacancy rates.
13. Our building services indicators continue to show a positive direction of travel with a **high percentage of repairs** completed on first visit alongside a low number of **void properties**, however this is set alongside challenges with residents' satisfaction with some of the services the Council offers which is being addressed in the Housing annual report.
14. Key indicators around the number of children within services for **Children in Care** and **Child Protection Plans** are stable and in February, Ofsted inspected York's services for children and young people and rated them Outstanding in all areas. This puts York in the top 7% of local authorities' children's services in the country. Ofsted recognised the council's ambition and determination to provide outstanding services, creating an environment for improvement, based around putting children first and highlighted the council leadership's aligned core values and strong commitment to children, young people and families.

## Benefits and Challenges

15. This report is to note the outturn position for 2024/25. There are continuing challenges to deliver on approved savings agreed in previous years as well as future Transformation savings and efficiencies. The benefits of a balanced budget is that resources can be diverted into delivering Council priorities.

## Policy Basis for Decision

16. This report is to note the outturn position for 2024/25. The ongoing financial resilience and stability of the council is essential in ensuring Council priorities can continue to be achieved.

## Financial Strategy Implications

17. The report sets out that year shows a balanced position albeit with a requirement to draw down earmarked reserves. There remain overspends within Adult Social Care and some savings that are proving difficult to fully recognise in the short term. There continues a need therefore to focus on reducing expenditure and maximising income to safeguard financial resilience and stability.
18. It will be necessary therefore to continue with the successful cost control measures that have been in place over the last two years as we seek to deliver the savings outlined above.

## Recommendation and Reasons

19. Executive is asked to:
  - Note the finance and performance information.
  - Note the use of earmarked reserves in order to balance the budget
  - Due to delays in delivering the first grant scheme in 2024/25 the balance of the City Wide Ward Fund (£50k) to be carried forward in 2025/26.
  - Approve the use of £75k from the HRA underspend to be set aside to support the Neighbourhood Caretaker initiative

*Reason: to ensure expenditure is kept within the approved budget.*

- Approve the extension to July 2028 for the letter of credit to York Theatre Royal as outlined in paragraphs 29 to 31

*Reason: to secure the financial viability of theatre and the benefits it brings to the city*

## **Background**

### **Financial Summary and Mitigation Strategy**

20. The draft outturn position shown an overspend of £1.1m across service areas for the year compared to a comparable overspend of £4.3m at Monitor 3. There has been a requirement to balance the budget with a drawdown from earmarked reserve totalling £572k as well as use of contingency £576k. The year end position has improved by £3.2m compared to Monitor 3.
21. As outlined in previous reports to Executive, the financial position across the council has been less severe than was faced in the previous year. Council identified £14m of savings at its meeting in February 2024 and even though these have not all been fully delivered the result has given the council much needed resilience. There are however continued recurring overspends, primarily across Adults Social Care, which cause concerns. Many of the underspends and mitigations that we have seen us to balance the budget at year end have generally been one off.
22. Members will be aware that the financial position of local government is a national challenge and that the pressures being seen across both Adult and Children's Social Care are not something that is unique to York. Many Councils are experiencing significant financial pressures and struggling to balance their budgets now, so it is vital that we continue the work started last year to reduce our expenditure down to a sustainable level both within the current financial year and over the medium term.
23. The delivery of savings plans continues to be a clear priority for all officers. Corporate Directors and Directors will keep Executive Members informed of progress on a regular basis.

### **Financial Analysis**

24. The Council's net budget is £149m. Following on from previous years, the challenge of delivering savings continues with c£14m to be required in 2024/25 to reach a balanced budget. The draft outturn on a Directorate basis is shown in the table 1 below.

Service area	Net budget* £'000	2024/25 Q3 Forecast Variation £'000	2024/25 Outturn Variation £'000	Change £'000
Children & Education	35,261	994	531	-463
Adult Social Care & Integration	52,051	3,608	4,155	+547
Env. Transport & Planning	30,360	-859	-1,899	-1,040
Housing & Communities	11,613	711	688	-23
Corporate & Central Services	19,407	-149	-2,352	-2,203
<b>Sub Total</b>	<b>148,692</b>	<b>4,305</b>	<b>1,123</b>	<b>-3,182</b>
Contingency	576	-576	-576	0
Use of earmarked reserves		-1,089	-547	+542
<b>Total including contingency</b>	<b>149,268</b>	<b>2,640</b>	<b>0</b>	<b>-2,640</b>

\*Budgets includes Support Service Charges totalling £20m with the offset being within Central Services

Table 1: Finance overview

25. The year end position shows that there has been an overspend across service budgets of £1,123k which can be funded from the use of contingency £576k and the need to draw down of earmarked reserves totalling £547k. This is an overall improvement of c.£3.2m compared to Monitor 3 which demonstrates the council's cost control measures are working.

### Reserves and Contingency

26. The February 2024 budget report to Full Council stated that the minimum level for the General Fund reserve should be £7.4m. At the beginning of 2024/25 the reserve stood at £7.4m.
27. In addition to the general reserve of £7.4m there are a range of other earmarked reserves where funds are held for a specific purpose. These reserves are always subject to an annual review and these funds will again be reviewed on a quarterly basis and where appropriate to do so will be released to support the in-year position. Whilst this is a prudent approach that will ensure the financial

resilience of the Council it is not a substitute for resolving the underlying overspends but instead allows time to develop future savings proposals in a planned way.

## **Loans**

28. Further to a scrutiny review, it was agreed that these quarterly monitoring reports would include a review of any outstanding loans over £100k. There is one loan in this category for £1m made to Yorwaste, a company part owned by the Council in June 2012. Interest is charged on the loan at 4% plus base rate therefore interest of 8.75% and 8.5% was charged during the year. All repayments are up to date.

## **Theatre Royal**

29. In June 2024, Executive approved a letter of guarantee to the York Theatre Royal (YTR) providing them with access to a maximum of £426k over the following 2 years, should it be required, to secure the Theatre as a going concern and provide assurance to their auditors and potential grant providers.
30. YTR have requested that the letter of guarantee be extended by two years, to 31 July 2028 as they continue to operate with minimal reserves and need the letter of guarantee extending for their auditors to be able to sign off their accounts as a going concern.
31. The letter of guarantee outlines the Council's commitment to providing YTR with the funds should they be required, on receipt of evidence that the funds are required (i.e., that reserves, and other income sources, have been exhausted). This allows the Theatre to demonstrate that they are a going concern, as well as providing the certainty they need to continue to operate. The YTR management team are delivering on a range of actions to improve the theatre's financial position through a change programme which includes an increase in fundraising activity. The continued operation of the theatre allows a significant contribution to community access to culture and to cultural wellbeing to continue.

## **Directorate Analysis**

### **Children and Education**

32. The directorate outturn position is an overspend totalling £531k. This is an improvement of £463k reported at Monitor 3. The table below summarises the position by service area.

	2024/25 Budget	Forecast Outturn Variance £'000	Forecast Outturn Variance %
Children's Safeguarding	24,932	1,048	+4.2
Education & Skills	14,226	-35	-0.5
School Funding & Assets	-5,731	-65	-4.1
Director and Central Budgets	1,833	-417	-34.2
<b>Total Children and Education</b>	<b>35,260</b>	<b>+531</b>	<b>+1.5</b>

\*Budget includes £5.8m support service recharges

33. The overspend of £531k represents a significant and continuing improvement in the financial position of the directorate. During 2022/23 the projected unmitigated overspend peaked at £8.7m, reducing to £4.6m in 2023/24. This reflects the considerable progress that has been made within the directorate to manage spend in a number of key areas, particularly; agency staffing, high cost placements and home to school transport.
34. As previously reported, the number of Children Looked After (CLA) in York has consistently been at a higher level than the budget was built to accommodate. The number at the beginning of the financial year was 243, at the end of 2024/25 it was 240. Placement budgets overspent by a total of £1,513k. The pressure on this budget is partly due to the limited market for children's placements and the statutory requirements placed on local authorities to meet children's needs, coupled with inflationary pressures which continue to worsen the position.
35. The Safeguarding Interventions & Assessment Teams budget has underspent by £267k due to vacancies within various teams.
36. Staffing & other budgets within Children's Social Work Services has underspent by £431k. The majority of this underspend is due to additional income. Legal fees have overspent by £155k.



37. There was an underspend of £209k in the MASH & Targeted Intervention teams. This is due vacant posts and income not previously forecast.
38. The Disabled Children's Services has overspent by £710k mainly due to overspends on direct payments/Early Help of (£228k) and home support (£556k). We recouped £145k of historic direct payments during the year and improved the process for future payments. A specific project is reviewing health contributions and how this process can be better going forward.
39. Innovation and Children's Champion was underspent by £142k due to the ability to fund some expenditure from the Family Hubs grant, Family Seeing grant & Changemakers grant.
40. The Home to School Transport budget, which has been in an overspend position for a number of years, has a year end overspend of £137k an increase of £60k from Monitor 3. The main reason is an increase in the number of pupils requiring taxi transport from that originally predicted for the new academic year.
41. Staff resourcing issues and turnover in the SEND Statutory Services Team, and the need to resource work to progress the Safety Valve targets have continued and resulted in the need to appoint a number of agency staff and also increase supporting resources. However, the outturn position shows an underspend of £42k, with agency staffing costs of £82k offset by savings in staffing budgets due to vacancies of £98k, and an underspend on other non-staffing budgets of £26k.
42. The Educational Psychologists Service overspent by £11k, due to the need to commission external agency support to clear a backlog of assessments, however this was offset by reduced staffing costs due to vacancies with the team.
43. Effectiveness and Achievement (£6k underspent) and the Skills Team (£57k underspent) were both affected by vacancies throughout the year and staff not yet at the top of grade.
44. There was an underspend of £87k within the Virtual School and Inclusion service as a result of vacancies, one-off savings in non-staffing expenditure and additional grant funding supporting already committed expenditure.

45. The Dedicated Schools Grant (DSG) is ahead of the target position set out in the Safety Valve recovery plan agreed with the DfE. The local authority is now in the third year of this four year agreement and has exceeded the financial targets for the first two years.
46. The brought forward balance on the DSG at 1 April 2024 was a deficit of £291k. The outturn position for 2024/25 was an in-year surplus of £883k. However, included in this figure is an amount of £960k of Safety Valve funding, so without this the in-year position would have been a deficit of £77k. The result is a final position at the 31<sup>st</sup> March 2025 of a surplus of £592k.
47. Despite the DSG now being in a cumulative surplus position, pressure on High Needs is increasing significantly. The budget for 2025/26 has been set on the basis of a predicted deficit in the year of £342k. This deficit is predicted despite the inclusion of the final funding due under the Safety Valve of £2m, thus the underlying in-year deficit against the DSG ordinarily receivable is £2,342k.
48. Due to this underlying position, the local authority expects significant challenges in managing this position in future years, despite the cumulative deficit being eliminated a year early. In common with the national picture, York is continuing to experience an increase in High Needs pupils together with an increasing complexity of need, often requiring expensive provision, especially in Post 16 and Post 19 provision and the education element of Out of Authority placements. In particular York is facing a significant increase in demand for special school places, often exacerbated by tribunal decisions. In addition, due to the significant pressures on mainstream school budgets, it is becoming increasingly difficult for High needs pupils to be supported in these settings. This situation is particularly difficult in York due to the low level of school funding which has a significant impact on these schools' ability to adequately meet the needs of High Needs pupils.
49. The Safety Valve agreement committed the local authority to bring the DSG into an in-year balanced position by 2025/26. Further payments are conditional on the local authority meeting the targets set out in the Management Plan, and reporting quarterly to the DfE on progress, with the eventual aim of eliminating the in-year deficit by the target date, with additional payments by the DfE eliminating the historic deficit at that point.

50. As a result of the above, the fourth year of the Safety Valve agreement is likely to be the most difficult to date, with an increasing risk of the LA being unable to balance increasing high needs expenditure with the funding received in the High needs block of the DSG. Officers are working hard to avoid this position, but it is becoming increasingly challenging to achieve.
51. One option that is available to LAs with significant High Needs pressures is to seek approval to transfer up to 0.5% of the Schools Block to the High Needs Block. York is beginning a consultation process with the Schools Forum with the objective of gaining approval for such a transfer in the financial year 2026/27. If this approval is not granted, the LA can submit a disapplication request to the Secretary of State for Education to still allow such a transfer.
52. General Fund budgets within School Funding and Assets has underspent by £65k.

### **Adult Social Care**

53. The outturn position for Adult Social Care is an overspend of £4,156k and the table below summarises the reported position by service area. The position worsened by £548k since that reported at Monitor 3.

	2024/25 Budget £'000	Forecast Outturn Variance £'000	Forecast Outturn Variance %
Direct Payments	5,038	+1,897	37.7
Home and Day Support	2,277	+414	18.2
Supported Living	15,689	+2,218	14.1
Residential care	16,462	+1,959	11.9
Nursing care	5,149	+361	7.0
Short term placements	140	+426	304.0
Staffing (mostly social work staff)	7,666	-31	-0.4
Contracts and Commissioning	2,470	-314	12.7
In House Services	5,088	-353	-6.9
Be Independent & Equipment	1,042	+158	15.2
Other	-13,699	-2,582	-18.8
Recharges	4,730	+3	0.0
<b>Total Adult Social Care</b>	<b>52,052</b>	<b>+4,156</b>	<b>8.0</b>

\*The above includes SSM charges totalling £4,737k

54. The following paragraphs outlined the main variations. Some of the variations seem large but several are due to previous years' savings not being delivered.
55. ASC has received £9.5m growth in the budget for 2025/26 to deal with some of these pressures: £8m as outlined in the budget papers to deal with underlying pressures/inflation with a further £1.5m being allocated to reflect the change in the Employers' National Insurance threshold which will impact significantly on the care providing sector.
56. This is significant investment, but the department will still need to mitigate a likely overspend at Q1. Realigning the budget to reflect package numbers in February 2025 estimated £7m of commitments above the 2024/25 budget and the consultation on fee uplifts will cost approximately £6m. The standard rates paid for Older People's residential and nursing care have had to increase significantly to prevent contracts being handed back and secure existing placements.
57. The position will be mitigated by quantifying the financial benefits of the programme of projects under way monitored at the ASC ambition Board, reviewing and seeing if any can be expedited to deliver savings earlier. Previous years' unachieved savings will also be reviewed, as will an assessment of whether all due income is being recovered. The recent Use of Resources report and other available benchmarking data will also be analysed to ensure all areas and opportunities have been considered when mitigating the financial position.

#### External Care

58. The Council purchases care from external providers who support individuals to meet their assessed needs. There are a variety of purchasing arrangements such as block contracts (purchasing a set number of beds/hours at a set rate), spot arrangements where prices are negotiated on an individual basis and frameworks where providers specify a rate and the Council will approach those providers but are not contractually bound to use.
59. The Council can also be a lead commissioner for a package of care where Health contributes an element towards the Health needs of a person and current practice is for the Council to pay the provider and recover from Health.

60. Direct Payments are slightly different in payments are made to individuals who then control how the money is spent to meet their assessed needs, usually with the assistance of a support agency who help with the administration of the funds such as payroll, paying invoices etc.
61. ASC generally organise themselves alongside the four main primary need groups and allocate the budgets accordingly. These are:
- People with a Learning Difficulty (LD)
  - People with a Physical and/or Sensory Impairment (P&SI)
  - People experiencing poor Mental Health (MH)
  - Older People experiencing mobility issues, memory and cognition issues, frailty (OP)
62. The following sections describe the variations to budgeted costs, numbers of packages and income. The variations are generally due to not fully meeting previous years' savings targets plus significant price pressures in the market.

#### Direct Payments

63. Learning Disability (LD) direct payments have overspent by £1277k. This is mainly due to the average cost of a direct payment being £93 per week more than in the budget (£586k), and the average cost of a transport direct payment being £35 per week more (197k). In addition, there are 8 more individuals receiving a direct payment than assumed in the budget (£228k), and the average weekly health contribution received per person is £700 less than in the budget (£348k). This is offset by an increase in reclaims this year.
64. The Older People direct payments budget has overspent by £364k. The average cost of a direct payment package is £133 per week higher than in the budget (£293k) and the average cost of a transport direct payment is £108 per week higher (£38k). There has also been a significant shortfall in DP reclaims made in year against budget of £182k – In 2021/22 and 2022/23 over £1m was recovered each year but this has dropped to £373k in 2023/24 and £409k in 2024/25.
65. Reclaims have reduced for several reasons but are mainly around people using any uncommitted funds to make up shortfalls to their employees/providers where their budgets have ended up in deficit. There has also been an issue in reviewing packages to see if any contingency could be repaid to the Council.

66. The Physical & Sensory Impairment direct payment budget has overspent by £330k, largely due to an underachievement of the reclaims budget (£212k). In addition, there are 3 more individuals receiving a direct payment (£77k), and the average cost per person is £9 per week higher compared to budget (£47k).

Home and Day Support

67. P&SI Community Support has overspent by £179k. This is largely due to the average cost of an exception contract being £517 per week higher than assumed in the budget.
68. Learning Disability (LD) Community Support budget has overspent by £121k. There are 6 more people in homecare placements than in the budget (£184k) and the average cost per person is £229 per week higher than budgeted for (£273k). In addition, the average health contribution received per person is £295 per week less than in the budget (£249k).
69. LD day support average weekly cost across 152 placements has reduced by £62 giving an underspend of £486k due to new placements in the year being at a lower weekly rate than budget.
70. The Community Support budget for LD of 18 - 25 years olds has overspent by £177k. The average weekly cost of a day support is £162 higher than assumed in the budget (£313k) and the average cost of a homecare placement is £684 higher (£107k). This is offset by having 2 fewer homecare placements and 1 fewer day support person (-£141k). In addition, there has been an increase in the average weekly CHC income received per person (-£102k)

Supported Living

71. Supported Living are settings where more than one person lives, with their own tenancy agreements, where their needs are met by a combination of shared support and one to one support.
72. The Learning Disability Supported Living budget has overspent by £1,568k. The average cost of a placement is £127 per week more than in the budget (£1,231k) and there are two more people in placement (£165k). In addition, the average contribution received from individuals is £14 per week less (£118k).

73. The Physical & Sensory Impairment Supported Living schemes budget has overspent by £495k. This is mainly due to the average cost of a placement being around £408 per week higher than in the budget.
74. Supported Living is acknowledged as an area that will benefit from further analysis and review and bringing this budget back in line is key to the overall financial position and sustainability of the ASC budget.

#### Residential care

75. The Older People Residential Care budget has overspent by £1,857k. There are currently 17 more people in placement than in the budget (£952k) and the average cost per placement is £213 a week higher (£3,041k). This is offset by having 7 more individuals receiving CHC income (-£215k), 30 more making contributions towards the cost of their care (-£667k) and the average weekly contribution per person being £70 higher than in the budget (-£897k). Additional discharge fund income has also been applied to this budget (-£401k).
76. There is an overspend of £191k on the Physical & Sensory Impairment working age residential placement budget. This is largely due to the placement numbers and average weekly costs increasing while Section 117 and health contributions have reduced.
77. Mental Health permanent residential care budgets have underspent by £124k. The average cost of an over 65 placement is £476 per week less than in the budget (-£276k), offset by having 2 more placements.

#### Nursing Care (£361k overspend)

78. Older People Permanent Nursing Care has underspent by £190k. The average cost per placement is £112 per week less than in the budget (-£667k) and additional discharge fund income has been applied to this budget (-£370k). This is offset by the average health income received per person being £617 a week less than in the budget (£559k), the average rate of individuals contributions being £16 a week less (£73k) and having two more people in placement (£177k).
79. The Mental Health Nursing care budgets have overspent by £262k. There are 4 more people in working age placements than assumed the budget of 1 person and the average weekly cost has increased £90 per week.

#### In House Services and Staffing

80. The Council employs a variety of staff to advise and assess residents' and individuals social care needs. We also directly provide care and support to individuals and have teams which provide home care both in the community overnight and in our Independent Living Schemes, as well as running day support activities for those with a learning difficulty and those experiencing poor mental health. We also operate short stay residential care for the same groups.
81. Yorkcraft, the Council's supported employment service, overspent by £97k due to unachieved savings from previous years (£124k), offset by an underspend on staffing.
82. There has been an underspend of £479k on the Personal Support Service (PSS) and Community Care budgets. This follows the decision to outsource the community care element of the service, transferring those staff to fill in vacancies in the PSS rotas and reducing the use of agency staff. Also, some hours have been held back pending the refurbishment of Glen Lodge.
83. Numbers supported in Independent Living Schemes (ILS) have also fallen partly due to the refurbishment at Glen Lodge taking capacity out of the system. The service and model of support is being reviewed in order for these schemes to offer a realistic alternative to residential/intensive home care and make full use of the two extensions and additional capacity created as part of the Older Person's Accommodation Project
84. 22 The Avenue has overspent by £30k in total, made up of overspends on property maintenance and an underachievement of income.
85. Be Independent & Equipment (£158k) - Be Independent provide equipment to allow individuals to remain independent and active within their communities. They also provide an alarm response service means tested as to whether an individual pays for it.
86. There is still a budget gap of £180k arising from when the service was originally outsourced which has yet to be fully addressed. Staffing has overspent by £62k largely due to an unfunded regrade of some of the posts in the team and to having a review manager post above establishment and there is an underachievement of income of (£74k). This is offset by an underspend on equipment (-£57k), private sector adaptations (-£58k) and premises costs (-£38k).



Other (£2,582k underspend)

87. The budget set aside to fund Preparing for Adulthood individuals coming through from Children's Services has not been fully needed this year (£458k). For 2025/26, this has been used in rebasing the external care budgets due to the known commitments of individuals coming through from Children's Services.
88. There has been no spend against the department's retirement and redundancy budget (£100k) and there are underspends on the Care Act and Older People's Accommodation Review budgets (£151k). These are likely to be utilised in 2025/26.
89. Around £479k of the Market Improvement & Sustainability Fund (MISF) and £1.5m of uncommitted funding has been held back to mitigate the overspends in Adult Social Care in 2024/25. These funds have subsequently been used to rebase budgets in 2025/26.

**Environment, Transport and Planning**

90. The directorate outturn position is an underspend totalling £1,899k for the year which is an improvement of c£1m at year end.
91. The table below summarises the latest forecasts by service area

	Budget £'000	Outturn Variance £'000	%
Transport	8,606	-487	-6%
Fleet	229	0	0%
Highways	5,943	-151	-3%
Parking Services	-7,897	-571	7%
Waste	15,450	-726	-5%
Public Realm	3,953	-59	-1%
Emergency Planning	169	6	4%
Planning Services	1,627	184	11%
Public Protection	1,485	-87	-6%
Community Safety	795	-20	-3%
Management	0	12	-6%
<b>TOTAL</b>	<b>30,360</b>	<b>-1,899</b>	<b>-6%</b>

\*Note the budget includes SSM charges totalling £5,524k

92. The Directorate has delivered a larger underspend than forecast primarily due to improved income delivered across Waste and Parking Services.
93. Within Transport there was an underspend of £487k across the service. There were savings across public transport support (£-290k) as the council maximised external funding streams such as s106 contributions and Bus Service Operator Grants. Income remained strong across the service particularly relating to Temporary Traffic Regulation Orders as well as a rebate of costs (£101k) incurred in previous years from Network Rail relating to the Copmanthorpe Crossing enquiry. There were overspends across CCTV (£+100k) as maintenance costs were above budget and shortfall of ANPR income (£+89k) as the equipment at one site was not functioning as planned.
94. In line with the council transport strategy there have been a reduction in transactions across council car parks (4.8%). Car park income however has outturned at 2.9% ahead of budget (£-301k) as income per transaction increased by 11%. Total income in car parks was c5% higher than previous year. The breakdown of the income variations ('-' is ahead of budget)
  - Off street -£256k
  - On Street +£65k
  - Season Tickets -£30k
  - Respark -£80k
95. Across other areas of parking there was additional income from charges to a developer working on Micklegate (£126k) and savings from car park maintenance across the service (£104k).
96. It should be noted that the council utilises the net parking income to fund its highways and transport expenditure.
97. There was an underspend of (£726k) across waste disposal and collection. Income from selling spare capacity at Allerton Waste Recovery Plan was £425k higher than forecast as overall council waste tonnages remained static. The council also received a further £125k from deductions as the KPI for recycling was not met by the facility operator.

98. The garden waste subscription service was introduced in August 2024. The final total of subscriptions across the year was 39,301 (59.4%) which was higher than initially forecast. The year end revenue of £824k (including 2nd bin charges) was £142k below budget but given the part year impact, the performance was very strong.
99. Income from recycling income was £170k (23%) above budget and the Commercial Waste service delivered additional income of £122k (8%)
100. Within the Highways area there was an underspend of £151k which was due to reduced street lighting energy costs (£139k), savings related to fewer gritting runs budgeted £76k.
101. Across planning services there was an overspend of £184k primarily due to a shortfall in income from building control (+£166k) as the service has at this time very limited staffing resources and primarily only able to provide the statutory service.

### **Housing and Community Services**

102. The directorate outturn position is an overspend of £688k which is a slight improvement (£24k) on the forecast at Monitor 3. The table below summarises the latest forecasts by service area.

	2024/25 Budget £'000	Draft Outturn Variance £'000	Draft Outturn Variance %
Housing Services	2,574	+49	1.9
Healthy & Sustainable Homes	806	+72	8.9
Communities	8,008	+34	0.4
Customer Services	42	+248	590.5
Policy & Strategy	259	+285	110.0
<b>TOTAL</b>	<b>11,689</b>	<b>+688</b>	<b>5.9</b>

\*Note the budget includes SSM charges totalling £4,070k

103. Across Housing Services there have been significant additional repair costs at the Gypsy and Traveller sites with repairs costing £126k more than budget. Members will be aware that a capital budget of £750k has been included for 2025/26 to make much needed structural repairs at the sites which is expected to result in reduced costs at the sites in future years. Typical problems relate to repairs to floors and heating pumps, plus blocked drains and bollards.

104. There has been additional funding provided by government to reduce and prevent homelessness and rough sleeping. This grant money has funded council housing services to provide accommodation and housing services to prevent rough sleeping. Some of the additional grant is funding extra support to vulnerable individuals to prevent rough sleeping and some existing budgeted services. The service has also absorbed the changing lives contract with two hostels and additional supported accommodation. The additional grant funding has resulted in additional costs of bringing the hostels in-house being broadly contained within the overall budget.
105. There was an overspend in Healthy and Sustainable Homes related to income from HMO licences not meeting expected numbers (£72k).
106. As previously reported the main pressure in Communities relates to a £300k library saving. The council is undertaking statutory processes to ensure any changes reflect a libraries Assessment of Need. The process requires time to review provision levels as well as necessary public consultation and agreement from the partners, however there has been no saving delivered in year and the value for 2025/26 now totals £600k. There remains an aspiration to gain a full saving from the process, but the timeline is in question.
107. Across Communities it was possible to mitigate the library cost pressure by maintaining vacancies and holding back on expenditure in areas such as Sport and within communities teams. There was an underspend on the City Wide Ward Committee Fund of £53k as round 2 didn't progress as anticipated. It is proposed that the second round of funding £50k is carried forward into 2025/26.
108. Within the Customer services area there has been an overspend of £248k. Bereavement Services have faced additional costs from the CYC share of losses within the Fulford Cemetery which have totalled £70k in the year. Options are being explored with the Parish council which manages the cemetery to minimise the losses going forward and therefore the council's exposure. Crematorium fees and charges alongside cost pressures resulted in an overspend of £130k in the year.
109. As previously reported the agreed saving of £500k from bus shelter advertising was not delivered this year. There is a transition year in 2025/26 and savings are not anticipated to be delivered until 2026/27.

### Housing Revenue Account

110. The Housing Revenue Account budget for 2024/25 was set as a net surplus of £2,023k prior to debt repayment at February 2024. There were carry forwards of £2,293k agreed as part of the outturn report meaning the revised budget stands at £8,670k deficit (including £8,400k debt repayment). Once revenue contributions to capital expenditure are excluded the underspend on the HRA was £2,441k (equating to c5% of expenditure. The table below provides details by main expenditure and income heading.

Activity area	2024/25 Budget £'000	Draft Outturn Variance £'000	Draft Outturn Variance %
Repairs & Maintenance	10,761	-813	-7.5%
General Management	7,136	-251	-3.5%
Special Services	3,911	-410	-10.5%
Other Expenditure	20,600	-2,398	-7.6%
Dwelling rents	-37,933	+46	+0.1%
Non-Dwelling Rents	-533	-28	-5.3%
Charges for Services	-2,385	+201	+8.4%
Other Income	-1,318	-863	-65.5%
<b>Total</b>	<b>270</b>	<b>-4,515</b>	<b>n/a</b>
Debt Repayment	8,400	0	0
<b>Total HRA Position</b>	<b>8,670</b>	<b>-4,515</b>	<b>-50.3%</b>
Revenue Contribution to capital schemes slippage		+2,074	
<b>Revised Position</b>	<b>8,670</b>	<b>-2,441</b>	<b>-26.4%</b>

111. Across repairs 99% of the general reactive repairs budget was spent in the year. There was however a significant underspend of £659k against the planned project expenditure much of this relating to external painting. Delays in procuring contractors for this work meant missing much of the season when the work is most effective.
112. Across General Management there were a number of savings arising from vacancies across the asset management teams and the housing operations teams.

113. Across Special Services the underspend is primarily due to lower than budgeted energy costs and savings made whilst a significant section within Glen Lodge has been closed (with subsequent lost revenue)
114. There was slippage of £2m within the capital programmes of schemes that are funded from revenue contributions notably Energy Efficiency and Housing Environmental Improvement Programme. It is proposed that £75k of the slippage is used to support the Neighbourhood Caretaker model with staff resource being utilised on HRA estates.
115. Across income there was a shortfall of £249k across sheltered housing due to the closure of Glen Lodge. Elsewhere rent income was in line with budget. There was additional income from interest income (£850k) as interest rates remained higher than budget and HRA balances remained high.
116. The levels of working balance has allowed for the initial repayments £121.5m debt that the HRA incurred as part of self-financing in 2012. The first repayment of £1.9m was paid in 2023/24 and a second payment on £8.4m was repaid at 31st March 2025. This repayment has been funded from general HRA reserves.
117. The HRA working balance position as at 31st March 2024 was £30.0m and following the outturn position this position has reduced to £25.8m.

### **Corporate & Central Services**

118. The forecast outturn position for the remaining areas of the Council is a net underspend of £149k and the table below summarises the latest forecasts by service area.

	2024/25 Budget £'000	Outturn Variance £'000	Outturn Variance %
Director of Finance	5,967	-122	-2.0%
CO HR & Support Services	10,137	-92	-1.0%
Director of Governance	3,821	-66	-1.7%
City Development	1,136	-99	-8.7%
Public Health	607	-5	-0.8%
Other Corporate & Treasury Mgt	18,942	-1,968	-10.4%
Support Services Net Income	-21,203	0	0.0%

<b>Total</b>	<b>19,407</b>	<b>-2,352</b>	<b>-12.1%</b>
--------------	---------------	---------------	---------------

\*The above includes £1,036k of Support Service Charges and £21,203k of support service income

119. Within the corporate services directorates have all delivered underspends during the financial year.
120. Pressures in Finance due to External Audit fees (£157k) being higher than budgeted due to additional work undertaken as a part of the year end accounts. These have been offset by increased insurance interest (£71k) and favourable staffing variations and recharges (Finance £95k, Business Intelligence £75k and Procurement £18k).
121. Within Property there have been unbudgeted dilapidation costs of Commercial Properties (£142k, 1 Museum Street) and additional spend on external legal fees, (£137k). These were offset by additional fee income across the architects and engineering teams (£88k).
122. The Governance underspend is largely due to favourable staffing variations in Legal (£103k) which have covered overspends in Coroners (£41k) and Democracy (£21k).
123. The underspend in HR and Support Services is predominately due to staffing underspends in Business Support.
124. Across City Development the £98k savings have been achieved though staff vacancies and an additional opportunity to charge staff costs to the UK Share Prosperity Grant.
125. The Public Health Budget is showing an underspend of £5k however there was a net £60k underspend on the Public Health reserve that has been transferred into the Public Health reserve. The reserve stands at 31/03/2025 at £837k.
126. The Treasury Management budget underspent by £1,699k which was due to the levels of slippage in the capital programme and the reduced requirement for borrowing. This will not be recurring as the council is committed to the borrowing but the timing will determine the revenue impact.

## **Performance – Service Delivery**

127. This performance report is based upon the city outcome and council delivery indicators included in the Performance Framework for the Council Plan (2023-2027) which was launched in September 2023. Wider or historic strategic and operational performance information is published quarterly on the Council's open data platform; [www.yorkopendata.org.uk](http://www.yorkopendata.org.uk)
128. The Executive for the Council Plan (2023-2027) agreed a core set of indicators to help monitor the Council priorities and these provide the structure for performance updates in this report. Some indicators are not measured on a quarterly basis and the DoT (Direction of Travel) is calculated on the latest three results whether they are annual or quarterly.
129. A summary of the city outcome and council delivery indicators by council plan theme are shown in the paragraphs below, and the latest data for all of the core indicator set can be seen in Annex 1.

### **Performance - Health and Wellbeing: A health generating city**

130. **Number of children in temporary accommodation** – at the end of Q3 2024-25, there were 57 children in temporary accommodation in York which is an increase from 50 in Q1. The increase in Q3 has occurred in-line with the overall households in temporary accommodation also rising slightly from Q1. The proportion of households with dependent children continues to be just under half the total households in temporary accommodation (49% at Q3). The majority of these children are in stable family setups, do not show evidence of achieving worse outcomes, and York continues to report no households with children housed in Bed and Breakfast accommodation. Data for Q4 2024-25 will be available in August 2025.
131. **%pt gap between disadvantaged pupils and their peers achieving 9-4 in English and Maths at KS4** – Data shows that the gap at age 16 has narrowed both in York (31%) and Nationally (22%) in summer 2024 compared to the previous year. However, this now shows that the gap for York is wider than National.
132. **% of reception year children recorded as being overweight (incl. obese)** – The participation rates for the National Child Measurement Programmes (NCMP) in York for 2023-24 were 96.9% for reception aged children and 94.5% for Year 6 pupils.



- The 2023-24 NCMP found that 22.8% of reception aged children in York were overweight (including obese), compared with 22.1% in England and 23.8% in the Yorkshire and Humber region. York has the fourth lowest rate of overweight (including obese) for reception aged children in the Yorkshire and Humber region. The rate in York has increased compared with 2022-23 (from 19.9% to 22.8%).
- Of Year 6 children in York, 33.5% were overweight (including obese) in 2023-24 compared with 35.8% in England and 37.5% in the Yorkshire and Humber region. York has the second lowest rate of overweight (including obese) for Year 6 children in the Yorkshire and Humber region. The rate in York has increased compared with 2022-23 (from 32.5% to 33.5%).

133. **Slope index of inequality in life expectancy at birth** – Average Life Expectancy for men in York (79.8 years) is above the England average (79.1 years). For women (83.6 years) it is also above the England average (83.1 years).
134. Healthy Life Expectancy for men in York (62.0 years) is above the England average (61.5 years). For women (62.7 years) it is also above the England average (61.9 years).
135. The Slope Index of Inequality in life expectancy at birth measures the difference in life expectancy between the most and least deprived areas within a population. A higher value indicates a greater difference in life expectancy between the most and least deprived areas, suggesting greater health inequalities. The first published values were for 2011-13.
136. Since 2011-13 the inequality in life expectancy for women, in York, has increased (worsened) from 6.2 years to 6.7 years. The English average is currently 8.3 years.
137. Since 2011-13 the inequality in life expectancy for men, in York, has increased (worsened) from 6.6 years to 10.1 years. The English average is currently 10.5 years.
138. Deprivation deciles are drawn up using data from the 2019 Indices of Multiple Deprivation (IMD). The Lower Super Output Areas (LSOAs) in York are ranked from 1 to 120 on the overall IMD measure and then divided into local deprivation deciles with 12 LSOAs in each.

139. For women, in York, between the most and least deprived deciles there is currently a 9.2 year difference in life expectancy. For men, it is currently a 10.7 year difference in life expectancy.

140. **% of adults (aged 16+) that are physically active** – The latest data from the Adult Active Lives Survey for the period from mid-November 2023 to mid-November 2024 was published in April 2025. In York, 366 people aged 16 and over took part in the survey, and they reported higher levels of physical activity, and lower levels of physical inactivity, compared with the national and regional averages. York has the 6th highest physical activity rate and the lowest physical inactivity rate in England (out of 296 Districts and Unitary Authorities). Positively:

- 76.5% of people in York did more than 150 minutes of physical activity per week compared with 63.7% nationally and 62.3% regionally. There was a significant improvement in physical activity in York compared with the previous year (69.8%).
- 12.9% of people in York did fewer than 30 minutes per week compared with 25.1% nationally and 26.9% regionally. There was a significant improvement in physical inactivity in York compared with the previous year (18.8%).

141. **Percentage of people who use services who have control over their daily life** – In 2023-24, 81% of all York's respondents to the Adult Social Care Survey said that they had "as much control as they wanted" or "adequate" control over their daily life, which was higher than the percentage from respondents in the Y&H region as a whole (80%). It is also higher than the corresponding percentage who gave one of these responses in England as a whole (78%). It has slightly increased in York from the 2022-23 figure (78%).

142. **Percentage of people who use services who have control over their daily life – Older People** – In 2023-24, 76% of older people in York that responded to the Adult Social Care Survey said that they had "as much control as they wanted" or "adequate" control over their daily life. This is the same as the corresponding percentages experienced by older people in the Y&H region (76%) and higher than for older people in England as a whole (74%). However, it has decreased in York from the 2022-23 figure (77%).

143. **Overall satisfaction of people who use services with their care and support** – Data at LA and national level for 2023-24 was

published in December 2024, and the data shows that there has been a slight decrease in the percentage of York's ASC users who said that they were "extremely" or "very" satisfied with the care and support they received from CYC compared with 2022-23 (down from 67% to 65%). The levels of satisfaction experienced by York's ASC users in 2023-24 were slightly lower than those in the Y&H region (66% said they were "extremely" or "very" satisfied with the care and support from their LA) but the same in England as a whole (where 65% gave one of these answers).

144. **Health Inequalities in wards** – The 'health gap' indicators show the difference between the wards with the highest and lowest values. A lower value is desirable as it indicates less variation in health outcomes based on where people live within the City. Trend data for these indicators helps to monitor whether the gaps are narrowing or widening over time.

- Absolute gap in % of Year 6 recorded overweight (incl. obesity) between the highest and lowest York ward (3 year aggregated) - The value for this indicator for the 3 year period 2021-22 to 2023-24 was 22.9% (the gap between 41.9% in Huntington & New Earswick and 19.0% in Heworth Without). The gap has narrowed compared with the previous reporting period (from 24.7% to 22.9%). The trend in this gap indicator shows a widening in the difference between the values in the highest and lowest ward over time (18.4% in 2008-09 to 2020-11 to 22.9% in the most recent 3 year period).
- Absolute gap in % of children who reach expected level of development at 2-2.5 years of age between highest and lowest York ward (4 yr aggregated) - The value for this indicator for the 4 year period 2020-21 to 2023-24 was 10.53% (the difference between 95.95% in Haxby & Wiggington and 85.42% in Clifton). The latest value represents an improvement (a narrowing of the gap in York) compared with the previous values of 13.65% for 2019-20 to 2022-23 and 13.1% for 2018-19 to 2021-22.
- Absolute gap in % of children totally or partially breastfeeding at 6-8 weeks between highest and lowest York ward (4 year aggregated ward data) - The value for this indicator for the 4 year period 2020-21 to 2023-24 was 39.3% (the gap between 81% in Heworth Without and 41.7% in Westfield). There has been a

widening of the gap from the 4 year period 2017-18 to 2020-21 (36.5%) to the most recent 4 year period (39.3%).

145. **Children and young people in care per 10k, excluding short breaks** – At the end of March 2025, 240 children and young people were in York’s care. As a rate per 10k population, this is just below the National average (2023-24) and within York’s expected range. Unaccompanied Asylum Seeking Children (UASC), a sub-group of children in care, are expected to increase in number in York. At the end of March 2025, 15 of York’s children in care were UASC, compared to 21 in December 2024. The National Transfer Scheme now mandates that “*the Home Office will not transfer UASC to an authority that is already looking after UASC in line with, or greater than, 0.1% of their child population*”. For York, this is equivalent to approximately 34 young people based on current population.
146. **Children subject to a Child Protection Plan** – 125 children were the subject of a Child Protection Plan at the end of March 2025. As a rate per 10k population, York is just below the National average (2023-24). The number of children subject to a Child Protection Plan in York ranged between 125 and 150 in 2024-25.

### **Performance - Education and Skills: High quality skills and learning for all**

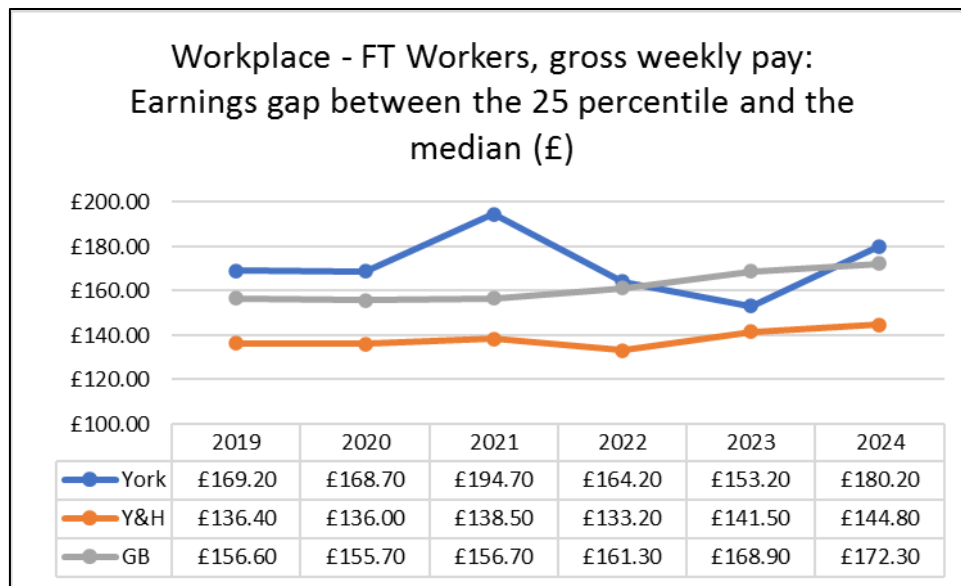
147. **% of working age population qualified to at least L2 and above** – In 2024-25, 93.3% of the working age population in York were qualified to at least L2 and above (GCSE grades 9-4), which is higher than the national and regional figures (86.7% and 85.2% respectively). This result ranks the city of York first regionally. This latest figure is an increase from 2023-24 (90%). It should be noted that there has been a slight change in methodology from 2022-23.
148. **% of working age population qualified to at least L4 and above** – In 2024-25, 59.6% of the working age population in York were qualified to at least L4 and above (certificate of higher education or equivalent), which is higher than the national and regional figures (47.6% and 40% respectively). This result ranks the city of York fourth regionally. The 2024-25 figure is an increase from 2023-24 (53.8%).
149. **% of pupils achieving 9-4 or above in English and Maths at KS4** – DfE data shows strong performance for York pupils when compared with National averages. In 2023-24, 70.5% of York’s Year 11s

achieved grades 9-4 in English and Maths (considered a standard pass), compared to 65.5% Nationally.

150. **% of children who have achieved a Good Level of Development at Foundation Stage** – In 2023-24, 70% of our 5-year-olds achieved a Good Level of Development compared to 67.7% Nationally, and 66.1% in Yorkshire and Humber.

### **Performance - Economy: A fair, thriving, green economy for all**

151. **Universal Credit Claimants** – At the end of March 2025 there were 14,337 people, in York, on Universal Credit. Although this is the highest figure to date, surpassing the previous high of 13,236 in February 2021, it is low compared to the region or nationally, and represents 11% of the working population in York, compared to 21% regionally and 16% nationally. The figures dropped to a low of 11,054 in May 2022 but they have steadily increased since then. This is a mixture of increased claimants and people who have been migrating over from other legacy benefits (Tax Credits, Housing Benefit, Income Support, Jobseeker's Allowance and Income-related Employment and Support Allowance), with the picture becoming clearer in 2025 as DWP expects/plans for all people on these legacy benefits to have moved over to Universal Credit in the year.
152. There are two types of claimant: those in employment and those not. Both types have been gradually increasing in the last 12 months with the number of those not in employment increasing as claimants of legacy benefits are migrated across to Universal Credit. The increase in the number of those in employment may be attributed to a higher percentage of part time workers (29.2% in York, 24.9% regionally and 24.6% nationally). In the region, York has the highest number of part time workers and the highest number of claimants in employment but the lowest proportion of claimants not in employment (57.1% compared to a regional high of 69.5%).
153. **Earnings gap between the 25 percentile and the median (£)** – In York, the latest figures suggest that median earnings have increased by 8.6% and the 25 percentile earnings have increased by 6.0%, and this means that the earnings gap has increased by 17.6%, in 2024, to £180.20. This is the highest gap since 2021. Nationally, there has been an increase of 2.3% to £172.30 and regionally an increase of 2.0% to £144.80.

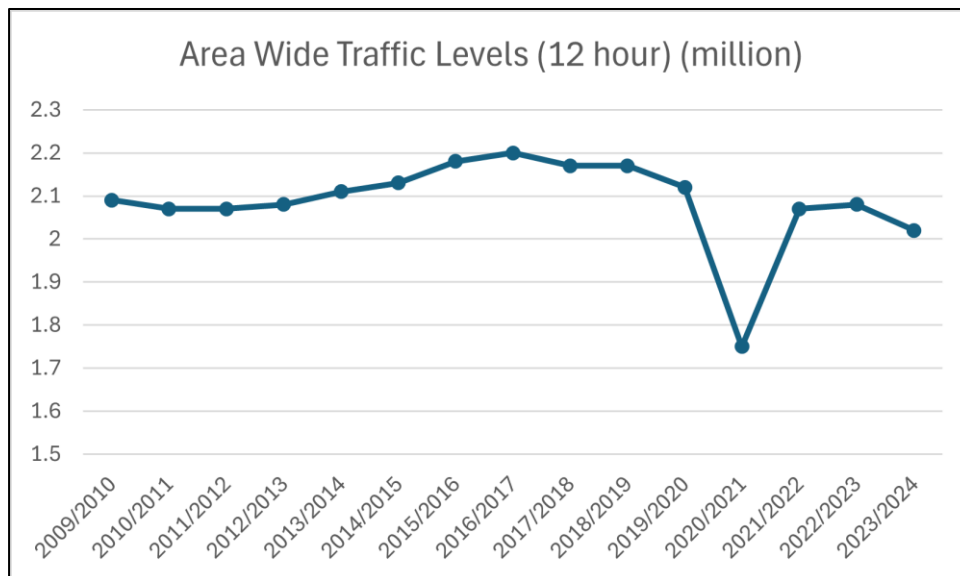


154. **Housing affordability (median house prices to earnings ratio) –** Owning a home in York remains largely unaffordable. In 2024, full-time employees, in York, could expect to spend around 8.5 times their annual earnings buying a home, compared to 7.7 times annual earnings in England and 5.8 times annual earnings in the region. In York this has decreased by around 7% on last year whilst national and regional levels have both fallen by around 8%.
155. **% of vacant city centre shops –** At the end of March 2025, there were 41 vacant shops in the city centre which equates to 6.52% of all city centre shops. This is 15 shops lower than at the same point in 2024 and much lower than the latest national benchmark in 2023-24 of 14%. The latest York figure is the lowest seen for a number of years.
156. **Business start ups –** Figures for 2022-23 showed 870 new business start-ups for York, which is higher than in the previous year (746 in 2021-22). The York figure is at only a slightly lower level to that seen before the pandemic (932 in 2019-20). The year to date figure up to the end of February 2024 of 767 new start ups is at a similar level to last year. The monthly figures for business start ups in York came from a regionally paid for dataset but this has now come to an end. Alternative sources of this information are being sought.
157. **GVA per head (£) –** In 2022-23, the GVA per head in York was £37,313 which was the second highest figure regionally. This latest figure is an increase from last year (£33,571). Annually since 2009-10, the GVA per head has generally been increasing (from £25,976 per head).

158. **% of working age population in employment (16-64)** – In Q3 2024-25, 77.8% of the working age population were in employment, which is higher than the national and regional figures (75.5% and 73.8% respectively) and the York performance gives the city a ranking of third regionally. The figure for Q3 2024-25 in York remains fairly high overall but is lower than the figures seen for the previous two years.
159. **% of Total Employees working for an Accredited Living Wage/Good Business Charter employer** – 16% of employees worked for an Accredited Living Wage employer and 13.5% worked for an Accredited Good Business Charter employer in 2023-24, which are at the same level as last year.
160. **Survival of Newly Born Businesses post 1 year** – In York, 175 businesses were created in Q3 2023-24, down 3% on a year ago. There were 160 business closures in the same quarter, which is 3% higher than in 2022-23. The survival rate post 1 year has been consistently around 94% in York for the last 4 years, with the latest figure of 93.9%. The York figures have been consistently higher than the National and Regional rates (92.3% and 91.7% respectively).

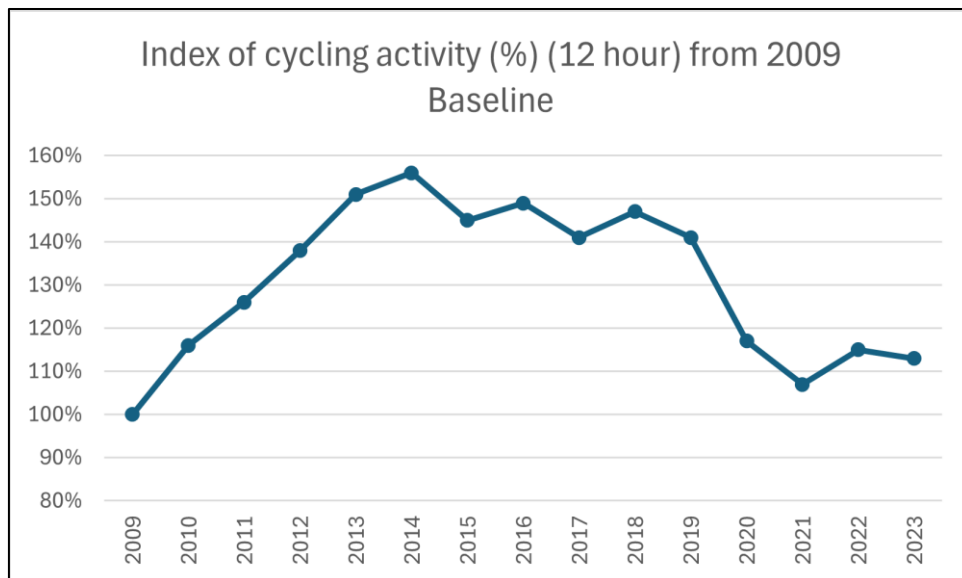
#### **Performance - Transport: Sustainable accessible transport for all**

161. **P&R Passenger Journeys** – Passenger journeys for park and ride customers totalled 3.77m during 2024-25, which is an increase from 3.6m during 2023-24. These latest figures show that recovery post-covid is continuing, although they are not yet back at the pre-pandemic figures of between 4.2 and 4.6m. New figures for local bus passenger journeys are being quality assured and will be available for inclusion in the Q1 2025-26 Monitor.
162. **Area Wide Traffic Levels** – Between 2011-12 and 2016-17, the number of vehicles on the city's roads increased year on year to a high of 2.2 million. Following this, the numbers decreased to a low of 1.75m in 2020-21. However, the covid pandemic brought with it numerous national lockdowns and local restrictions so the decrease in traffic levels was to be expected. Since then, figures had increased to 2.08m in 2022-23 although the latest figures show a slight reduction to 2.02m vehicles in 2023-24.

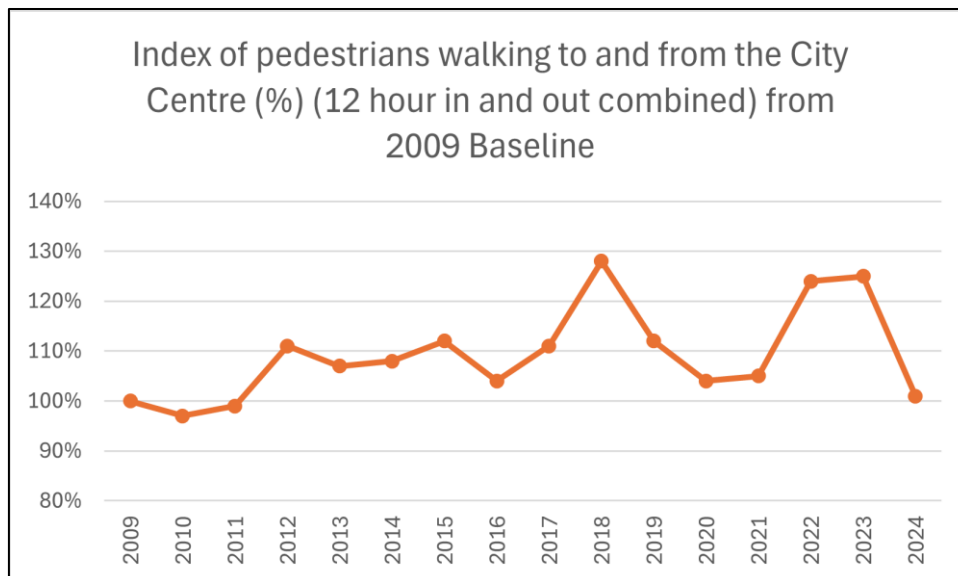


163. **Index of Cycling activity** – From a baseline taken in 2009, cycling figures increased year on year until 2014, where a high of 56% above baseline was achieved. Annual figures from 2014 then slowly started to fall until prior to the pandemic where cycling levels in the city were around 41% (2019) above the baseline. During the pandemic, figures then fell significantly and the latest data shows that cycling levels have been roughly comparable since with the actual figure for 2023 being 13% above the baseline of 2009.
164. The pandemic had a huge effect on how people travel around, and how much they travel. Other cities with high levels of cycling have also seen falls in activity. In York, cycling levels appear to have fallen because of a decline in commuting (as a result of more working from home), although travel patterns are still settling down. York has a strong walking and cycling heritage, but if we are to achieve our climate and traffic reduction targets and see a long-term, sustainable increase in rates of cycling, we need to enable more people to choose the bicycle as the primary way of getting around. There is much more to be done to encourage even more people towards riding, wheeling and walking in the future, and we have recently carried out an extensive LTP and Movement and Place consultations to better understand what changes we can make to help support residents to make the change to cycling, and how we can support our cycling communities. Data for 2024 will be available in July 2025.

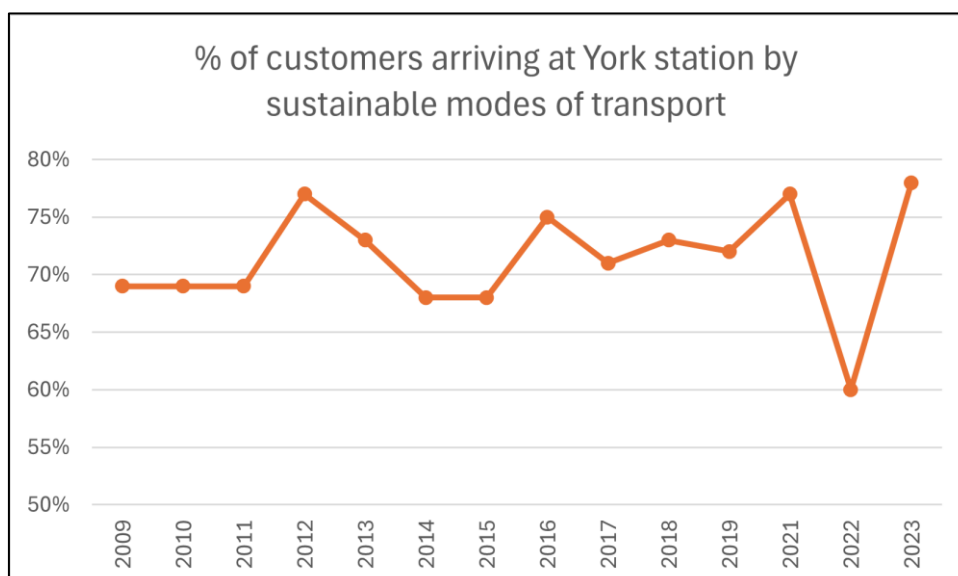




165. **Index of pedestrians walking to and from the City Centre** – From a baseline in 2009 (36,919), there has been a 1% increase in the number of pedestrians walking to and from the city centre in 2024. This is 24 percentage points lower than in 2023, but this drop is likely because there was heavy rain on the day the survey took place, so less people were walking to and from the city centre. Data is gathered on an annual basis over the course of one day; it is a count of pedestrians crossing an inner cordon set just beyond the inner ring road and includes off-road routes such as riverside paths.
166. For cycling and walking, data is collected over a 12 hour period once per year and there is a valuable record going back many years. However, the limited nature of the data (that it is only collected on one day) mean that other variables such as the weather and roadworks can have undue influence. Looking forward we are exploring more comprehensive ways of gathering data around walking and cycling, using some of the AI technology that is now available.



167. **% of customers arriving at York station by sustainable modes of transport** – In 2023, 78% of customers arrived at York station by sustainable modes of transport which is an increase from 60% in 2022 (the survey was delayed in 2022 so didn't take place until January 2023 which may have affected the result, and in addition, two of the usual counting locations were missed which may explain the lower than usual percentage). The data is usually gathered by an annual survey which takes place for a five-hour period in seven locations around the station. Members of the public are asked how they arrive at the station and the results are flow weighted to take into account the split of people arriving at each entrance. Data for 2024 will be available in July 2025.



168. **The number of CYC electric vehicle recharging points** – There were 103 CYC electric recharging points at the end of 2024-25, which is the same as at the end of 2023-24.
169. When looking at all providers of EV charging, the latest data collated by ZapMap, a charging locator app, shows that for York the total number of publicly available charging devices (all speeds) was 160 at the end of Q4 2024-25 which is an increase from 146 at the start of the year. The number of those which were rapid chargers was 50 at the end of Q4 which is an increase from 36 at Q1. A charging device may have more than one connector and be able to charge more than one vehicle at a time so the figures do not show total charging capacity but are an indication of and can be used to compare York to national and regional rates. The rate of devices available (all speeds) per 100,000 population was 78.2 for York compared to 66.2 Regionally and 115.4 Nationally. York was just above the Regional and National rates for rapid charging devices at the end of the year at 24.4 per 100,000 population compared to 22.3 Nationally and 21 Regionally.
170. **% of Principal/Non-principal roads where maintenance should be considered** – In 2024-25, the percentage of principal roads in York, from local figures, where maintenance should be considered was 14% (an increase from 11% in 2023-24). There are two processes for collecting this indicator, a local one for providing the figures above, and a one-off SCANNER survey which is used by the DfT for benchmarking. The latest York figure for SCANNER is 2% for principal roads in 2023-24 and this is slightly lower than the latest available benchmarks in 2023-24 (National average 4% and Regional average 3%).
171. The percentage of non-principal roads in York, from local figures, where maintenance should be considered was 33% in 2024-25 (a large increase from 25% in 2023-24). Like the above indicator, there are two processes for collecting this indicator, a local one for providing the figures above, and a one-off SCANNER survey which is used by the DfT for benchmarking. The latest York figure for SCANNER is 4% for non-principal roads in 2023-24 which is lower than the latest benchmarks in 2023-24 (National average 7% and Regional average 4%). Please note SCANNER surveys were not carried out in York in 2021-22 and 2022-23.

## **Performance - Housing: Increasing the supply of affordable housing**

172. **Number of new affordable homes delivered in York** – During 2024-25, affordable housing completions are significantly below the identified level of need (although 153 affordable homes have been delivered in 2024-25, compared to 122 in 2023-24). National scale challenges are facing many areas with buoyant housing markets such as a shortage of sites for affordable housing and labour and supply chain constraints, and these have affected delivery in York. The council itself is maximising delivery opportunities currently, and will access a range of funding opportunities for direct delivery in addition to securing over half of the total completions during 2024-25 through Section 106 planning agreements. The council's own Housing Delivery Programme will deliver an increased number of affordable homes during 2025-26, including accessing significant grant funding.
173. There is a significant and growing future pipeline of affordable homes with planning permission in place across the council's own newbuild development programme and section 106 planning gain negotiated affordable housing. This has been supported by the progress to adoption of the council's Local Plan. Inclusive of applications with a resolution to approve from Planning Committee, there are over 1,500 affordable homes identified in approved planning applications. The progress ranges from sites that are being built out currently to others with substantial infrastructure or remediation challenges to resolve prior to development. Over 600 of these have progressed through detailed planning, either as a Full application or Reserved Matters (inclusive of applications with Resolution to Grant from Planning Committee, awaiting s106 agreement). The remainder are at Outline stage, with more uncertainty on timescales and final delivery levels, including the York Central affordable housing contribution.
174. The Government and Combined Authority have stated that housing supply, and affordable homes in particular, are amongst its key delivery priorities and the council will take advantage of new opportunities in this climate wherever possible.
175. **% of dwellings with energy rating in A-C band in the EPC register** – An Energy Performance Certificate (EPC) gives a property an energy efficiency rating from A (most efficient) to G (least efficient) and is valid for 10 years. Apart from a few exemptions, a building must have an EPC assessment when constructed, sold or let. Whilst the EPC register does not hold data for every property, it can be viewed as an indication of the general efficiency of homes. The rating is based on

how a property uses and loses energy for example through heating, lighting, insulation, windows, water and energy sources. Each area is given a score which is then used to determine the A-G rating and a rating of A-C is generally considered to be good energy performance.

176. The % of properties on the register for York with an EPC rating of A-C at the end of March 2025 was 46.1%. This measure has increased incrementally month on month since CYC began reporting on the information in March 2023 when 42% of properties were rated A-C. The largest changes in York continue to be in the middle categories with around 4% less properties rated D-E and around 4% more rated C. Data is based on the last recorded certificate for 62,774 properties on the register for York, some of which will have been last assessed more than ten years ago. When looking at certificates added or renewed in the past year only for 2024-25, 59% of certificates were rated A-C for York compared to 61% Nationally and 57% Regionally.
177. **Net Additional Homes** – Between 1st April 2024 and 30<sup>th</sup> September 2024, a total of **398 net additional homes** were completed. This total comprises two elements:
  - There has been a total of 339 net housing completions. This represents more than double the number of housing completions compared to the same monitoring period last year. The main features of the housing completions that were carried out are:
    - 309 homes (91.2%) were completed on housing sites (Use Class 3).
    - 243 homes (71.7%) resulted from the change of use of other buildings to residential use. The Cocoa Works site provided 172 of these properties.
    - A total of 99 new build homes (29.2%) were completed.
    - 4 homes were demolished during the monitoring period.
    - Individual sites that saw the construction of five or less dwellings contributed just 37 (10.9%) additional homes.
    - The most significant individual sites providing housing completions (Use Class C3) over the monitoring period have been 172 flats at the Cocoa Works, Haxby Road (Phase 1 Blocks A and B), Cherry Tree House (48), 218 Fifth Avenue (48), Germany Beck (16), Former Civil Service Club, Boroughbridge Road (11) and the former York City Football Club, Bootham Crescent.

- In addition to the 339 net additional homes completed, four care home developments were built during the monitoring period resulting in a net increase of 107 bedspaces. Using the nationally set ratio for communal establishments, this equates to a further **59 completed homes**.

178. **Net Housing Consents** – Planning applications determined during the half year monitoring period of 1<sup>st</sup> April 2024 to 30<sup>th</sup> September 2024 resulted in the approval of **383 net additional homes** and represents an increase of almost sixty approved homes compared to last year's update covering the equivalent monitoring period.

179. The main features of the housing approvals are:

- 272 of all net homes consented (71%) were granted on traditional housing sites (Use Class C3).
- Sites granted approval on traditional housing sites (Use Class C3) included Station Yard, Wheldrake (139), Land at Moor Lane, Copmanthorpe (75), whilst the site at Hospital Fields Road & Ordnance Lane was granted consent for an additional 16 homes compared to its earlier approval for 85 homes. A further 36 homes were approved on sites of 5 homes or less.
- The Enterprise Rent-a-Car site at 15 Foss Islands Road was granted consent for 133 privately managed student accommodation studio flats.
- Two previously approved sites at Huntington South Moor New Lane Huntington (-20) and Chelmsford Place Fulford Road (-4) resulted in a total loss of 24 homes compared to their original consents.
- During the monitoring period, a further 282 homes were approved by Planning Committee through a resolution to grant planning permission subject to the execution of a section 106 agreement and recommended conditions. These sites are at draft housing allocation ST4: Land adjacent to Hull Road (162) and the Retreat, 107 Heslington Road (120). These sites are still awaiting full approval.

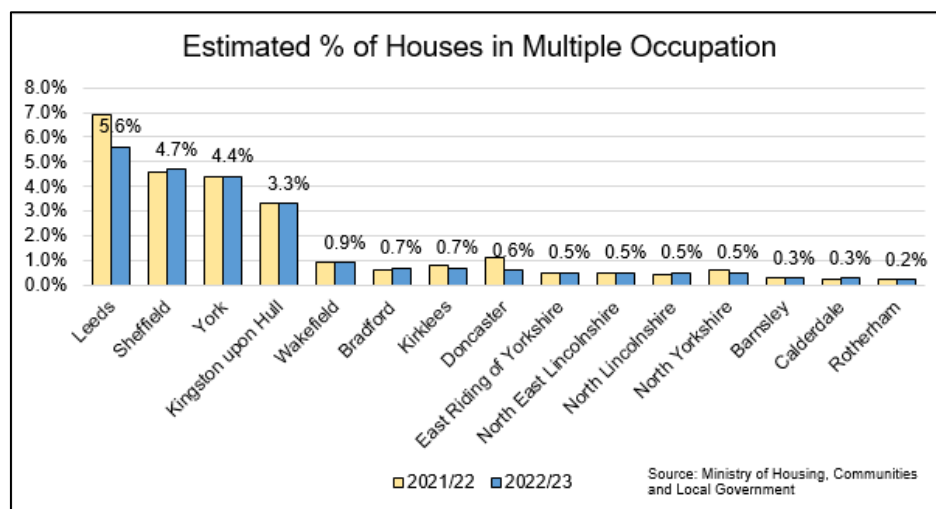
180. **Number of homeless households with dependent children in temporary accommodation** – at the end of Q3 2024-25 there were 30 households with dependent children in temporary accommodation in York which is an increase from 26 in Q1. The increase has occurred in-line with the overall households in temporary accommodation also increasing from 57 households in Q1 to 61 in Q3. The % of

households in temporary accommodation which have dependent children was 49% which is comparable with previous quarters at just under half the total households and below the national figure for the same period where 63% were families. Although the council would like these to reduce further, progress has been made from the peaks seen at the end of 2022-23.

181. Of the 30 households with children in temporary accommodation at quarter end, all were recorded as accommodated in hostels, this will generally be James House which is designated accommodation for families. Everyone who is homeless and in temporary accommodation will have a support worker to guide them through the process of finding and keeping future accommodation along with help for budgeting, debt advice, independent living skills, tenancy management and completion of actions on a personal housing plan. York continues to report no households with children housed in Bed and Breakfast accommodation at quarter end.
182. When looking at the total number of households in temporary accommodation per households in area (000s), York has seen a slight increase during 2024-25 but continues to perform positively compared to benchmarks (0.69 in York compared to 5.28 Nationally and 1.58 Regionally). Data for Q4 2024-25 will be available in August 2025.
183. **Number of people sleeping rough** – Every year, Local Authorities in England provide a figure for how many people they believe are sleeping rough on a typical night between 1 October and 30 November. This can be provided through a count of rough sleepers on a single night, or an intelligence led estimate. Rough sleeping is defined as sleeping or about to bed down in the open air or places not designed for habitation. For Autumn 2024, York reported a figure of 30 people sleeping rough on a single night which is an increase from 15 reported in 2023. When looking at numbers of people sleeping rough per 100,000 population, York follows the National and Regional trend of increasing numbers, however, continues to be above both benchmarks for the time of year (York 14.5, National 8.1, Regional 6.9). Of the 30 people, 25 were male and 5 female which is a similar % split as Nationally, and none were under the age of 18.
184. In addition to the annual survey, a monthly count also takes place on the last Thursday of each month. Navigators carry out an early morning street walk checking known rough sleeping hot spots and responding to intel or reports of rough sleepers. The latest figure shows that there

were 14 people sleeping rough in York in March 2025, which is a large decrease from 23 people in March 2024 and from the high of 30 in the autumn.

185. **HMO's as % of properties in York** – The estimate of the proportion of Houses in Multiple Occupation (HMO) divided by the total number of dwellings within York in 2022-23 has remained at 4.4% which is the 3<sup>rd</sup> highest in the region, behind Leeds and Sheffield. The average for England is 1.5% and regionally it is 1.6%. Data for 2023-24 will be available in July 2025. It is not surprising that the levels are higher in university cities as a recent survey suggests that 7 in 10 students live in a privately rented HMO house while studying in the UK.



186. A HMO is defined as an entire house, flat or converted building which is let to three or more persons who form two or more households and who share facilities such as a kitchen, bathroom and toilet.
187. **% of dwellings failing to meet the decent homes standard** – Data submitted through the Regulator for Social Housing (RSH) Return showed that at the end of 2023-24, 140 council properties were considered to be non-decent which is 1.9% of council housing stock. The 2023-24 figure is a slight increase from 1.6% of properties at the end of 2022-23. The national figure reported by the RSH for 2023-24 was 3.64%. 2023-24 was the first time this return took place and 2024-25 data will be prepared over the coming months, with provisional figures likely due by the next monitor.
188. An increase in the number of non-decent properties for York was anticipated following the commissioning of a Full Stock Condition Survey to be carried out on HRA housing stock during 2024. The extensive survey provides a range of information on the internal,



external and communal safety and condition of each property. By the end of 2023-24, 36% of stock had been inspected and whilst strengthening the information held on housing, has surfaced further properties requiring work. Survey information received has highlighted in particular an increase in the number of properties with a category 1 hazard which causes an instant fail against the decent homes criteria, these are being responded to by the service as a matter of priority.

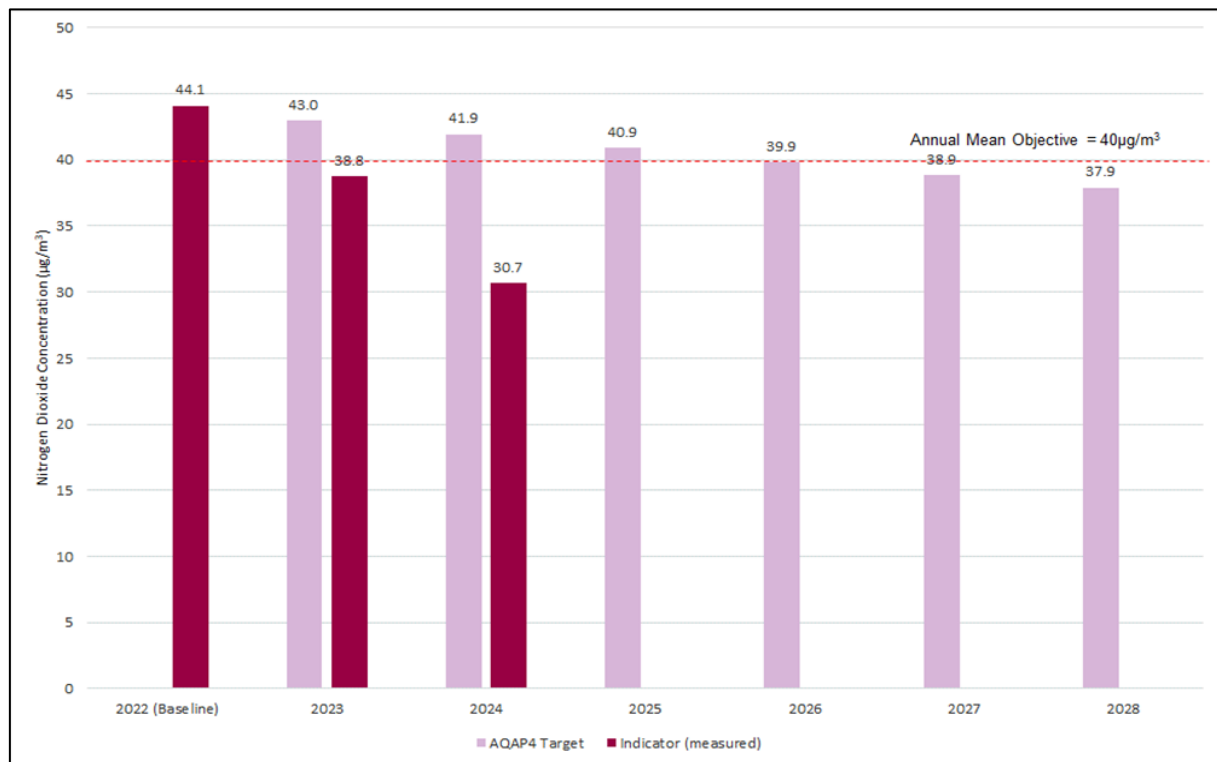
189. **% of repairs completed on first visit** – The percentage of repairs completed on the first visit was 82.9% in 2024-25, which remains high and is an increase from 80.3% in 2023-24.
190. **Number of void properties** – There were 55 void properties at the end of 2024-25, which is a slight increase from the 52 void properties at the end of March 2024. There were 7 major works voids at the end of March 2025, just one more than in March 2024.
191. **% of tenants satisfied that their landlord provides a home that is well maintained** – In 2023-24 in York, 64% of tenants were satisfied that the landlord provides a well maintained home, which is one of the tenant satisfaction measures collected for the Regulator for Social Housing (RSH). The national figure for 2023-24 reported by RSH was 67%. Results from the 2024-25 Tenant Satisfaction Survey show a reduction in this area with 56% of respondents reporting that they were satisfied. National figures for 2024-25 are due in early summer.
192. Combined with tenant feedback, data received from the 2024 stock condition survey, where around 87% of properties were physically inspected, will provide further evidence for the council to assess the condition of homes and act on results. York continues to report positive compliance rates for gas, fire, asbestos and water hygiene safety across housing stock and updated figures for homes meeting the Decent Homes Standard are due in the summer.

### **Performance - Sustainability: Cutting carbon, enhancing the environment for our future**

193. **Average of maximum annual mean Nitrogen Dioxide concentration recorded across three areas of technical breach** – With the exception of 2024 (and 2020 during the pandemic), CYC's air quality monitoring network has previously demonstrated sustained exceedances of the health-based nitrogen dioxide objective of 40µg/m<sup>3</sup> in 3 areas of the city, namely Gillygate/Lord Mayor's Walk,

Blossom Street/Holgate Road and Rougier Street/George Hudson Street. These are referred to as 'technical breach areas' and fall within CYC's Air Quality Management Area.

194. Whilst not all monitoring points within these areas were exceeding health-based standards, there has previously been at least one monitor at a point of relevant public exposure within each area that was above the annual mean objective of  $40\mu\text{g}/\text{m}^3$ . This indicator considers an average of the maximum annual mean concentrations of  $\text{NO}_2$  in these three areas.



195. As can be seen from the graph above:
- Projections undertaken for CYC's Fourth Air Quality Action Plan (AQAP4) suggested that it might take until 2026-27 for this indicator to fall below  $40\mu\text{g}/\text{m}^3$ . However, the rate of improvement observed in York between 2022-2024 has significantly exceeded that observed in earlier years from 2012-2022 (which was around 2.5% improvement a year over 10 years).
  - The AQAP4 target was met in 2024 and the indicator is well within the  $40\mu\text{g}/\text{m}^3$  health-based objective. This is a good result.

196. Measures such as the introduction of further electric buses (and other types of electric vehicle) across the network have undoubtedly contributed to this success. In line with commitments in AQAP4, CYC aims to improve air quality further in all areas to improve public health.
197. **Percentage of household waste sent for reuse, recycling or composting** – The latest provisional data for the proportion of household waste sent for reuse, recycling or composting was 36.6% within Q3 2024-25, which is a decrease from 37.9% during Q3 2023-24. There has also been a small decrease in the total household waste collected (196.5kg per household from the same time last year (202.9kg)), a reduction in reuse, recycling or composting waste per household (72kg from 77kg in 2023-24) however residual (approx. non-recycling) household waste remained at around 126kg per household. The increase in the number of households may account for the decrease in the overall recycling figures.
198. **Level of CO2 emissions across the city and from council buildings and operations** – Emissions associated with council operations have been reducing across every category we measure, due to the work underway to improve the energy efficiency of our buildings and fleet electrification. However, improvements to the scope and accuracy of our reporting methodology mean that new emissions are now being recorded, resulting in an overall increase in reported operational emissions. Fully understanding our emissions is an important step in managing and mitigation our impact. Further details are available here:  
<https://democracy.york.gov.uk/documents/s179414/Report.pdf>. City-wide emissions have experienced a small increase in 2021, following post-covid restrictions. While this rebound is not unexpected, emissions have not returned to pre-covid levels following the long-term trend of emissions reduction since 2005. The rate of reduction over this time, however, is not sufficient to meet our net zero by 2030 ambition and significant emissions reductions are needed over the remaining years. Further details are available here:  
[https://democracy.york.gov.uk/documents/s179439/EMDS\\_City%20Wide%20Emissions%202024.pdf](https://democracy.york.gov.uk/documents/s179439/EMDS_City%20Wide%20Emissions%202024.pdf)
199. **% of Talkabout panel satisfied with their local area as a place to live** – The second biannual resident satisfaction survey taken by the Talkabout panel took place during Q3 2024-25. Results from the Q3 2024-25 Talkabout survey showed that 80% of the panel were satisfied with York as a place to live, a five percentage point decrease from the

previous survey, returning to the same level as Q3 2023-24. 80% were satisfied with their local area, consistent with results from Q3 2023-24, and consistently higher than the average from the Community Life Survey, which recorded the lowest level of satisfaction since the survey began in 2013-14, at 74%.

200. **% of Talkabout panel who give unpaid help to any group, club or organisation** – Results from the Q3 2024-25 Talkabout survey found that 66% of panellists had given unpaid help to any group, club or organisation within the last 12 months. The government's Community Life Survey 2023-24 recorded that 54% had taken part in either formal or informal volunteering at least once in the last 12 months.
201. **Number of trees planted (CYC)** – During 2024-25, CYC planted circa 213 standards (trees around 2-3 metre in height) and 2,492 whips (trees around 30-50 centimetre in height) within the city's highway verges, parks and open spaces. Thirty of the standards were planted by the Council's Public Realm team with the remaining 183 standards and all whips delivered through the Council's 'Green Streets' initiative fully funded by external grants totalling £175,000. Whip planting included the creation of two 'Miyawaki' micro-woods to mark the coronation of King Charles III.
202. Adding these figures to the 150 standards and 2,516 whips planted during 2023-24 (fully supported by £75,000 external grant funding) brings the total number of trees delivered during the current Council Plan period to 5,371, exceeding, ahead of time, the Council's commitment to plant 4,000 additional trees by March 2028 to address the climate and nature emergencies.
203. **% of Talkabout panel who think that the council are doing well at improving green spaces** – The results for Q3 2024-25 showed that 38% of respondents agreed the Council and its partners are doing well at improving green spaces, consistent with results from Q1 2024-25.

### **Performance - How the council will operate**

204. **FOI and EIR – % of requests responded to in-time (YTD)** – 95% of FOI and EIR requests were responded to in-time during 2024-25, which is an increase from 89% in 2023-24 and the highest figure seen for a number of years.

205. **% of 4Cs complaints responded to in-time** – There has been a large decrease in the number of corporate complaints received over recent years and the decrease has continued into 2024-25 with 1,054 complaints (compared to 1,310 in 2023-24 and 1,866 in 2022-23). The percentage of corporate complaints responded to in time during 2024-25 was 70.1% which is a large decrease from 85.5% in 2023-24. The figures were lower during the start of the year but had increased in the second half and the March figure was 85.3% showing an improvement.
206. **% of the Talkabout panel reporting an excellent, good, satisfactory or poor experience when they last contacted the council about a service** – The results for this indicator for Q3 2024-25 show that the majority of the panel report having a ‘good’ (28%) or ‘satisfactory’ (38%) experience when they last contacted the Council, with 11% reporting an ‘excellent’ experience and 23% reporting a ‘poor’ experience, consistent with Q1 2024-25.
207. **Average sickness days per full time equivalent (FTE) employee** – At the end of March 2025, the average number of sickness days per FTE (rolling 12 months) had increased to 12.1 days from 11.2 in March 2024. The latest benchmarks show that the CIPD public sector benchmark is 10.6 days per FTE, putting us above national trends.
208. **York Customer Centre average speed of answer** – Phones were answered, on average, in 42 seconds during 2024-25 by the York Customer Centre. This is slower than in 2023-24 (13 seconds) but faster than the previous few years. Call volumes have increased in the last year due to garden waste calls.

## Consultation Analysis

209. Not applicable

## Options Analysis and Evidential Basis

210. Not applicable

## Organisational Impact and Implications

211. The recommendations in the report potentially have implications across several areas. However, at this stage

- **Financial implications** are contained throughout the main body of the report. The actions and recommendations contained in this report should ensure the continued financial stability and resilience of the Council both in the current year and in future years.
- **Human Resources (HR)**, there are no direct implications related to the recommendations.
- **Legal** The Council is under a statutory obligation to set a balanced budget on an annual basis. Under the Local Government Act 2003 it is required to monitor its budget during the financial year and take remedial action to address overspending and/or shortfalls of income.
- **Procurement**, there are no specific procurement implications to this report.
- **Health and Wellbeing**, there are no direct implications related to the recommendations.
- **Environment and Climate action**, there are no direct implications related to the recommendations.
- **Affordability**, there are no direct implications related to the recommendations.
- **Equalities and Human Rights**, there are no direct implications related to the recommendations.
- **Data Protection and Privacy**, there are no implications related to the recommendations.
- **Communications**, there are no direct implications related to the recommendations.
- **Economy**, there are no direct implications related to the recommendations.

## Risks and Mitigations

212. An assessment of risks is completed as part of the annual budget setting exercise. These risks are managed effectively through regular reporting and corrective action being taken where necessary and appropriate.

## Wards Impacted

213. All.

## Contact details

For further information please contact the authors of this report.

### Author

<b>Name:</b>	Debbie Mitchell
<b>Job Title:</b>	Director of Finance
<b>Service Area:</b>	Finance
<b>Telephone:</b>	Ext 4161
<b>Report approved:</b>	
<b>Date:</b>	

### Co-author

<b>Name:</b>	Ian Cunningham
<b>Job Title:</b>	Head of Business Intelligence
<b>Service Area:</b>	Finance
<b>Telephone:</b>	Ext 5749
<b>Report approved:</b>	
<b>Date:</b>	


## Annexes








**Annex 1:** Q4 Performance Tables - City Outcomes and Council Delivery Indicators 2023-2027









This page is intentionally left blank



## Annex 1 - Performance - City Outcomes and Council Delivery Indicators 2023-2027

Financial Health (Council)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
Forecast Budget Outturn (£000s Overspent / -Underspent) - CYC Subtotal (excluding contingency)	£3,661 (2023/24)	£1,123 (2024/25)	 Good	Quarterly	Not available	Q1 2025/26 data available in September 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						





Health and wellbeing: A health generating city (City)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
Income Deprivation Affecting Children Index (IDACI)	0.12 (2022/23)	0.1 (2023/24)	 Good	5 yearly	National Rank 2023/24: 253	2024/25 data available in December 2025
Number of children in temporary accommodation - (Snapshot)	52 (Q2 2024/25)	57 (Q3 2024/25)		Quarterly	No benchmarking as local indicator	Q4 2024/25 data available in August 2025
%pt gap between disadvantaged pupils (eligible for FSM in the last 6 years, looked after and adopted from care) and their peers achieving 9-4 in English & Maths at KS4	43.6% (2022/23)	31.1% (2023/24)	 Good	Annual	National Data 2023/24 21.90%	2024/25 data available in December 2025
% of reception year children recorded as being overweight (incl. obese) (single year)	19.9% (2022/23)	22.8% (2023/24)		Annual	National Data 2023/24 22.10%	2024/25 data available in November 2025
Slope index of inequality in life expectancy at birth - Female - (Three year period)	6.73 (2022/23)	6.71 (2023/24)		Annual	Regional Rank 2023/24: 4	2024/25 data available in May 2026
Slope index of inequality in life expectancy at birth - Male - (Three year period)	10.57 (2022/23)	10.08 (2023/24)		Annual	Regional Rank 2023/24: 4	2024/25 data available in May 2026
% of adults (aged 16+) that are physically active (150+ moderate intensity equivalent minutes per week, excl. gardening)	69.8% (2023/24)	76.5% (2024/25)	 Good	Annual	National Data 2024/25 63.7%	2025/26 data available in April 2026
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						

Health and wellbeing: A health generating city (Council)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
Percentage of people who use services who have control over their daily life	78% (2022/23)	81% (2023/24)		Annual	National Data 2023/24 78%	2024/25 data available in January 2026
Percentage of people who use services who have control over their daily life - Older People	77% (2022/23)	76% (2023/24)		Annual	National Data 2023/24 74%	2024/25 data available in January 2026
Overall satisfaction of people who use services with their care and support	66.5% (2022/23)	65.1% (2023/24)		Annual	National Data 2023/24 65.40%	2024/25 data available in January 2026
Health Inequalities in wards	See below	See below		Annual	See below	See below
Absolute gap in mortality ratio for deaths from circulatory disease (under 75) between highest and lowest York ward (5 year aggregated)	153.8 (2019/20)	141.1 (2020/21)		Annual	No benchmarking as local indicator	2023/24 data available in July 2025
Gap in years in Life Expectancy at birth for Males between highest and lowest York ward (5 year aggregated)	10.2 (2019/20)	11.7 (2020/21)		Annual	No benchmarking as local indicator	2023/24 data available in July 2025
Gap in years in Life Expectancy at birth for Females between highest and lowest York ward (5 year aggregated)	8.2 (2019/20)	11.1 (2020/21)		Annual	No benchmarking as local indicator	2023/24 data available in July 2025
Absolute gap in hospital admission ratio for self-harm between highest and lowest York ward ( 5 year aggregated)	133.2 (2019/20)	119.6 (2020/21)		Annual	No benchmarking as local indicator	2023/24 data available in July 2025







Absolute gap in hospital admission ratio for alcohol-related harm (narrow definition) between highest and lowest York ward (5 year aggregated)	70.7 (2017/18)	88.8 (2020/21)	➡	Annual	No benchmarking as local indicator	2023/24 data available in July 2025
Absolute gap in % of children who reach expected level of development at 2-2.5 years of age between highest and lowest York ward (4 yr aggregated)	13.65% (2022/23)	10.53% (2023/24)	↓ Good	Annual	No benchmarking as local indicator	2024/25 data available in August 2025
Absolute gap in % of Year 6 recorded overweight (incl. obesity) between highest and lowest York ward (3 year aggregated)	24.68% (2022/23)	22.84% (2023/24)	➡	Annual	No benchmarking as local indicator	2024/25 data available in November 2025
Absolute gap in % of children totally or partially breastfeeding at 6-8 weeks between highest and lowest York ward (4 year aggregated ward data)	38.98% (2022/23)	39.3% (2023/24)	➡	Annual	No benchmarking as local indicator	2024/25 data available in August 2025
Number of children in care, excluding Short Breaks - (Snapshot)	243 (2023/24)	240 (2024/25)	➡	Quarterly	National Data 2023/24 70 per 10k	Q1 2025/26 data available in July 2025
Number of children subject to a Child Protection Plan - (Snapshot)	142 (2023/24)	125 (2024/25)	↓ Good	Quarterly	National Data 2023/24 41.6 per 10k	Q1 2025/26 data available in July 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						

Education and Skills: High quality skills and learning for all (City)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
% of working age population qualified - to at least L2 and above (New methodology from 2022/23)	90% (2023/24)	93.3% (2024/25)	↑ Good	Annual	National Data 2024/25: 86.7% Regional Data 2024/25: 85.2%	2025/26 data available in April 2026
% of working age population qualified - to at least L4 and above (New methodology from 2022/23)	53.8% (2023/24)	59.6% (2024/25)	↑ Good	Annual	National Data 2024/25: 47.6% Regional Data 2024/25: 40%	2025/26 data available in April 2026
% of pupils achieving 9-4 or above in English & Maths at KS4 (C or above before 2016/17)	70.2% (2022/23)	70.5% (2023/24)	➡	Annual	National Data 2023/24 65.50%	2024/25 data available in December 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						








Education and Skills: High quality skills and learning for all (Council)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
% of children who have achieved a Good Level of Development (GLD) at Foundation Stage - (Snapshot)	69.7% (2022/23)	70.0% (2023/24)	➡	Annual	National Data 2023/24 67.70%	2024/25 data available in December 2025
Number of children who are eligible for a free school meal in the primary sector (excluding Danesgate) - (Jan Census snapshot)	2,197 (2022/23)	2,320 (2023/24)	➡	Annual	No benchmarking as local indicator	2024/25 data available in July 2025
% of children who are eligible for a free school meal in the primary sector (excluding Danesgate)	15.88% (2022/23)	16.99% (2023/24)	➡	Annual	National Data 2023/24 24.29%	2024/25 data available in July 2025
Number of children who are eligible and taking a free school meal in the primary sector (excluding Danesgate) - (Jan Census snapshot)	1,760 (2022/23)	1,938 (2023/24)	➡	Annual	No benchmarking as local indicator	2024/25 data available in July 2025
% of children taking a free school meal in the primary sector (excluding Danesgate) - (Jan Census snapshot)	12.72% (2022/23)	14.19% (2023/24)	↑ Good	Annual	No benchmarking as local indicator	2024/25 data available in July 2025
Number of children who are eligible for a free school meal in the secondary sector (excluding Danesgate) - (Jan Census snapshot)	1,621 (2022/23)	1,729 (2023/24)	➡	Annual	No benchmarking as local indicator	2024/25 data available in July 2025
% of children who are eligible for a free school meal in the secondary sector (excluding Danesgate)	14.26% (2022/23)	15.15% (2023/24)	➡	Annual	National Data 2023/24 24.12%	2024/25 data available in July 2025
Number of children who are eligible and taking a free school meal in the secondary sector (excluding Danesgate) - (Jan Census snapshot)	1,159 (2022/23)	1,299 (2023/24)	➡	Annual	No benchmarking as local indicator	2024/25 data available in July 2025

% of children taking a free school meal in the secondary sector (excluding Danesgate) - (Jan Census snapshot)	10.20% (2022/23)	11.38% (2023/24)	 Good	Annual	No benchmarking as local indicator	2024/25 data available in July 2025
Total number of children who are eligible for a free school meal - (York LA Local Measure) - (Jan Census snapshot)	3,985 (2022/23)	4,246 (2023/24)		Annual	No benchmarking as local indicator	2024/25 data available in July 2025
Total number of children who are eligible and taking a free school meal - (York LA Local Measure) - (Jan Census snapshot)	2,987 (2022/23)	3,289 (2023/24)	 Good	Annual	No benchmarking as local indicator	2024/25 data available in July 2025
Total number of active EHCPs overseen by SEND Services (Snapshot)	1,400 (2023/24)	1,610 (2024/25)		Monthly	No benchmarking as local indicator	Q1 2025/26 data available in August 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						






Economy: A fair, thriving, green economy for all (City)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
Universal Credit: Claimants	13,258 (2023/24)	14,337 (2024/25)	⬆️ Bad	Quarterly	Not available	Q1 2025/26 data available in July 2025
Workplace Earnings gap between the 25 percentile and the median (£) (York)	£153.20 (2023/24)	£180.20 (2024/25)	⬆️ Bad	Annual	National Data 2024/25 £172.30	2025/26 data available in December 2025
Housing affordability (median house prices to earnings ratio)	9.3 (2022/23)	8.5 (2023/24)	➡️	Annual	National Data 2023/24 7.5	2024/25 data available in March 2026
% of vacant city centre shops	8.87% (2023/24)	6.52% (2024/25)	⬇️ Good	Monthly	National Data 2023/24 14%	Q1 2025/26 data available in July 2025
Business Startups - (YTD)	796 (February 2023)	767 (February 2024)	➡️	Quarterly	No longer available	No longer available
GVA per head (£)	33,571 (2021/22)	37,313 (2022/23)	⬆️ Good	Annual	Regional Rank 2022/23: 2	2023/24 data available in July 2025
% of working age population in employment (16-64)	76.1% (Q2 2024/25)	77.8% (Q3 2024/25)	➡️	Quarterly	National Data Q3 2024/25 75.50%	Q4 2024/25 data available in July 2025
% of Total Employees working for an Accredited Good Business Charter employer	13.4% (2022/23)	13.5% (2023/24)	➡️	Annual	No benchmarking as local indicator	2024/25 data available in November 2025
% of Total Employees working for an Accredited Living Wage employer	16% (2022/23)	16.4% (2023/24)	➡️	Annual	No benchmarking as local indicator	2024/25 data available in November 2025
Survival of Newly Born Businesses post 1 year	94.4% (2021/22)	93.9% (2022/23)	➡️	Annual	Benchmark Post 2 years 2021/22 69.40%	2023/24 data available in November 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						




Transport: Sustainable accessible transport for all (City)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
P&R Passenger Journeys	3.6m (2023/24)	3.77m (2024/25)	 Good	Quarterly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
Local bus passenger journeys originating in the authority area (excluding P&R)	5.54m (YTD Dec 22)	7.26m (Prov) (YTD Dec 22)	 Good	Quarterly	No benchmarking as local indicator	TBC
Area Wide Traffic Levels (07:00 -19:00) (Excluding A64) from 2009/10 baseline (2.09m)	2.08m (2022/23)	2.02m (2023/24)		Annual	No benchmarking as local indicator	2024/25 data available in September 2025
Index of cycling activity (12 hour) from 2009 Baseline (31,587)	115% (2022)	113% (2023)		Annual	No benchmarking as local indicator	2024 data available in July 2025
Index of pedestrians walking to and from the City Centre (12 hour in and out combined) from 2009/10 Baseline (37,278)	125% (2023)	101% (2024)		Annual	No benchmarking as local indicator	2025 data available in December 2025
% of customers arriving at York Station by sustainable modes of transport (cycling, walking, taxi or bus - excluding cars, Lift, Motorcycle, Train)	60% (2022)	78% (2023)		Annual	No benchmarking as local indicator	2024 data available in July 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						









Transport: Sustainable accessible transport for all (Council)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
The number of CYC electric vehicle recharging points in York	103 (2023/24)	103 (2024/25)	➡	Quarterly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
% of Principal roads where maintenance should be considered (Local Recording)	11% (2023/24)	14% (2024/25)	➡	Annual	No benchmarking as local indicator	2025/26 data available in April 2026
% of Principal roads where maintenance should be considered (Scanner - NI - 130-01)	NC	2% (2023/24)	➡	Annual	National Data (Scanner DfT Comparison) 2023/24 4%	2024/25 data available in July 2025
% of Non-principal classified roads where maintenance should be considered (Local Recording)	25% (2023/24)	33% (2024/25)	⬆ Bad	Annual	No benchmarking as local indicator	2025/26 data available in April 2026
% of Non-principal classified roads where maintenance should be considered (Scanner - NI 130-02)	NC	4% (2023/24)	➡	Annual	National Data (Scanner DfT Comparison) 2023/24 7%	2024/25 data available in July 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						

Housing: Increasing the supply of affordable housing (City)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
Number of new affordable homes delivered in York	122 (2023/24)	153 (2024/25)	 Good	Quarterly	No benchmarking as local indicator	Q1 2025/26 data available in August 2025
% of dwellings with energy rating in A-C band in the EPC Register - Snapshot	44.6% (2023/24)	46.1% (2024/25)	 Good	Monthly	National Data 2023/24 59.7% Regional Data 55.3%	Q1 2025/26 data available in August 2025
Net Additional Homes Provided - (YTD)	152 (as at Q2 2023/24)	339 (as at Q2 2024/25)	 Good	Bi-annual	No benchmarking as local indicator	2024/25 full-year data available in July 2025
Net Housing Consents - (YTD)	324 (as at Q2 2023/24)	383 (as at Q2 2024/25)	 Good	Bi-annual	No benchmarking as local indicator	2024/25 full-year data available in July 2025
Number of homeless households with dependent children in temporary accommodation - (Snapshot)	28 (Q2 2024/25)	30 (Q3 2024/25)		Quarterly	No benchmarking as local indicator	Q4 2024/25 data available in August 2025
Number of people sleeping rough - local data - (Snapshot)	23 (2023/24)	14 (2024/25)	 Good	Monthly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
HMO's as % of properties in York	NA	4.4% (2022/23)		Annual	National Data 2022/23 1.50%	2023/24 data available in July 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						

Housing: Increasing the supply of affordable housing (Council)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
% of dwellings failing to meet the decent homes standard	1.6% (2022/23)	1.9% (2023/24)	➡	Annual	National Data (RSH Return) 2023/24 3.64%	2024/25 data available in September 2025
% of Repairs completed on first visit	80.26% (2023/24)	82.9% (2024/25)	➡	Quarterly	Housemark Median 2023/24 88.63%	Q1 2025/26 data available in July 2025
Number of Void Properties - Standard Voids - (Snapshot)	52 (2023/24)	55 (2024/25)	➡	Monthly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
Number of Void Properties - Major Works Voids - (Snapshot)	6 (2023/24)	7 (2024/25)	➡	Monthly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
Number of Void Properties - Capital Projects Voids - (Snapshot)	26 (2023/24)	19 (2024/25)	➡	Monthly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
Number of Void Properties - Total Voids (Excludes Not Offerable) - (Snapshot)	84 (2023/24)	81 (2024/25)	⬇ Good	Monthly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
Number of Void Properties - Not Offerables - (Snapshot)	77 (2023/24)	79 (2024/25)	➡	Monthly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
% of tenants satisfied that their landlord provides a home that is well maintained	63.58% (2023/24)	56.12% (2024/25)	⬇ Bad	Annual	National Data (RSH Return) 2023/24 66.90%	2025/26 data available in February 2026
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						

Sustainability: Cutting carbon, enhancing the environment for our future (City)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
The average of maximum annual mean Nitrogen Dioxide concentration recorded across three areas of technical breach (at points of relevant public exposure) - Calendar year	38.8 (2023)	30.7 (2024)	 Good	Annual	No benchmarking as local indicator	2025/26 data available in April 2026
Percentage of household waste sent for reuse, recycling or composting	37.91% (Prov) (Q3 2023/24)	36.57% (Prov) (Q3 2024/25)		Quarterly	National Data 2023/24 42.30% (Prov)	Q4 2024/25 data available in July 2025
Carbon emissions across the city (tonnes of carbon dioxide equivalent) - (Calendar Year)	816 (2020)	906 (2021)		Annual	No benchmarking as local indicator	2022 data available in November 2025
% of Talkabout panel satisfied with their local area as a place to live	79.68% (2023/24)	80.44% (2024/25)		Bi-annual	Community Life Survey 2023/24 74%	Q1 2025/26 data available in July 2025
% of Talkabout panel who give unpaid help to any group, club or organisation	60.17% (2023/24)	65.64% (2024/25)	 Good	Bi-annual	Community Life Survey 2023/24 54%	Q1 2025/26 data available in July 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						

Sustainability: Cutting carbon, enhancing the environment for our future (Council)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
Level of CO2 emissions from council buildings and operations (tonnes of carbon dioxide equivalent)	3,462.4 (2022/23)	3,309 (2023/24)	 Good	Annual	No benchmarking as local indicator	2024/25 data available in November 2025
Number of trees planted (CYC)	2,666 (2023/24)	2,705 (2024/25)		Annual	No benchmarking as local indicator	2025/26 data available in April 2026
% of Talkabout panel who think that the council are doing well at improving green spaces	36.84% (2023/24)	37.5% (2024/25)		Bi-annual	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						

How the Council will operate (Council)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
FOI & EIR - % Requests responded to In time - (YTD)	88.99% (2023/24)	95.32% (2024/25)	 Good	Monthly	Not available	Q1 2025/26 data available in July 2025
% of 4Cs Complaints responded to 'In Time'	85.54% (2023/24)	70.11% (2024/25)	 Bad	Monthly	Not available	Q1 2025/26 data available in July 2025
The % of the Talkabout panel reporting an 'excellent' experience when they last contacted the council about a service	10.92% (2023/24)	11.36% (2024/25)		Quarterly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
The % of the Talkabout panel reporting a 'good' experience when they last contacted the council about a service	34.86% (2023/24)	27.76% (2024/25)		Quarterly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
The % of the Talkabout panel reporting a 'satisfactory' experience when they last contacted the council about a service	34.51% (2023/24)	38.17% (2024/25)		Quarterly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
The % of the Talkabout panel reporting a 'poor' experience when they last contacted the council about a service	19.72% (2023/24)	22.71% (2024/25)		Quarterly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
Average Sickness Days per FTE - CYC (Excluding Schools) - (Rolling 12 Month)	11.2 (2023/24)	12.1 (2024/25)		Monthly	CIPD (Public Sector) 2022/23 10.6	Q1 2024/25 data available in August 2025
York Customer Centre average speed of answer	00:00:13 (Phone) (2023/24)	00:00:42 (Phone) (2024/25)		Monthly	No benchmarking as local indicator	Q1 2025/26 data available in July 2025
The DoT (Direction of Travel) is calculated on the latest three data points whether they are annual or quarterly. All historic data is available via the Open Data Platform						

This page is intentionally left blank



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15 July 2025
<b>Report of:</b>	Debbie Mitchell Director of Finance
<b>Portfolio of:</b>	Councillor Katie Lomas Executive Member for Finance, Performance, Major Projects, Human Rights, Equality & Inclusion.

## **Decision Report:** Treasury Management annual report and review of Prudential Indicators for 2024/25

### **Subject of Report**

1. The purpose of this report is to provide an update on Treasury Management activity and the outturn position for the 2024/25 financial year. It includes the outturn Prudential Indicators and forward projections at Annex A to this report.

### **Benefits and Challenges**

2. Treasury Management is the effective management of the Council's cash flow. Doing this effectively protects the Council from risks and ensures the ability to meet spending commitments as they fall due.

### **Policy Basis for Decision**

3. The CIPFA (Chartered Institute of Public Finance and Accountancy) Code of Practice for Treasury Management 2021 requires that full Council be updated with, review and approve, as a minimum three reports annually. These reports are the Treasury Management Strategy Statement setting out policy for the forthcoming year, a mid-year review report, and an annual report detailing the treasury activities and performance for the previous year. Quarterly reports are also required to provide an update on treasury

management activities and can be assigned to a designated committee or member as deemed appropriate.

4. This report is the Treasury Management annual report detailing the activities undertaken and performance in the financial year 2024/25, highlighting compliance with the Council's policies previously approved by members, and the monitoring and update of the Prudential Indicators. The Council is required through legislation to have this report and Prudential Indicators approved by members; therefore, this report ensures this Council is implementing best practice in accordance with the Code.

## **Financial Strategy Implications**

5. The Treasury Management function is responsible for the effective management of the Council's investments, cash flows, banking, and money market transactions. It also considers the effective control of the risks associated with those activities and ensures optimum performance within those risk parameters.

## **Recommendation and Reasons**

6. Executive is asked to note:
  - The 2024/25 performance of Treasury Management activity.
  - The Prudential Indicators outlined in Annex A and note the compliance with all indicators.

Reason: To ensure the continued effective operation and performance of the Council's Treasury Management function and ensure that all Council treasury activity is prudent, affordable and sustainable and complies with policies set.

7. It is a statutory duty for the Council to determine and keep under review the affordable borrowing limits. During the 2024/25 financial year, the Council has operated within the Treasury and Prudential Indicators set out in the Council's Treasury Management Strategy Statement for 2024/25.
8. There are no policy changes to the Treasury Management Strategy Statement 2024/25 for members to agree and approve; the details in this report update the Treasury Management position and Prudential Indicators in the light of the updated economic position and budgetary changes already approved.



## Background

9. This annual treasury management report has been prepared in compliance with the Chartered Institute of Public Finance and Accountancy's (CIPFA) Code of Practice on Treasury Management, and covers the following:
- A brief economic update for the 2024/25 financial year and interest rate forecast.
  - A review of the Treasury Management Strategy Statement and Annual Investment Strategy.
  - A review of the treasury position as at 31st March 2025.
  - A review of the Council's investment portfolio.
  - A review of the Council's borrowing strategy.
  - An update to the Prudential Indicators (set out at Annex A).
  - A review of compliance with the Treasury and Prudential Limits.

## Economic Update

10. Financial year 2024/25 saw:
- Interest rates fall by a 75bps, taking Bank Rate from 5.25% to 4.50%.
  - UK Gilt yields being volatile through the year and gilt yields rising after the Chancellor's Autumn Statement, remaining elevated for the remainder of 2024/25 financial year.
  - CPI inflation fell to 1.7% y/y in September having been 2.3% y/y in April before rising back to 2.8% y/y in February.
11. In its latest monetary policy meeting ending on 19<sup>th</sup> March 2025, the Bank of England left interest rates unchanged at 4.5%. The Bank of England's evolving view of the medium-term outlook for inflation means there will be a gradual and careful approach to monetary policy and that it *'would need to continue to remain restrictive for sufficiently long until the risks to inflation returning sustainably to the 2% target in the medium term had dissipated further'*.

## Interest Rate Forecast

12. Current interest rates and the future direction of both long term and short term interest rates have a major influence on the overall treasury management strategy and affects both investment and borrowing decisions.
13. Table 1 is MUFG Corporate Markets (formerly Link Group) interest rate forecast for both the bank base rate and long-term Public Works Loans Board (PWLB) Certainty borrowing rates (gilt yields plus 80 bps):

	Bank rate %	PWLB borrowing rates % (including certainty rate adjustment)			
		5 year	10 year	25 year	50 year
Mar 2025	4.50	5.00	5.30	5.80	5.50
Jun 2025	4.25	4.90	5.20	5.70	5.40
Sep 2025	4.25	4.80	5.10	5.60	5.30
Dec 2025	4.00	4.70	5.00	5.50	5.20
Mar 2026	3.75	4.60	4.90	5.40	5.10
Jun 2026	3.75	4.50	4.80	5.30	5.00
Sep 2026	3.75	4.40	4.70	5.20	4.90
Dec 2026	3.50	4.40	4.70	5.10	4.80
Mar 2027	3.50	4.30	4.60	5.00	4.70
Jun 2027	3.50	4.20	4.50	5.00	4.70
Sep 2027	3.50	4.20	4.50	4.90	4.60
Dec 2027	3.50	4.10	4.40	4.90	4.60
Mar 2028	3.50	4.00	4.40	4.80	4.50

**Table 1 – Link’s interest rate forecast at 10<sup>th</sup> February 2025**

## Treasury Management Strategy Statement 2024/25

14. Full Council approved the Treasury Management Strategy Statement for 2024/25 on 22<sup>nd</sup> February 2024. Details can be viewed here <https://democracy.york.gov.uk/ieListDocuments.aspx?CId=331&MId=13928#A167008> and here <https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=13934&Ver=4>.
15. There are no investment policy changes and the details in this report do not amend the Statement.

## Overall Treasury Position 31<sup>st</sup> March 2025

16. Table 2 shows the Councils net treasury debt and investment position for the financial year end 2024/25, shown with the 2023/24 financial year end position for comparison.

	Principal	Average Rate	Principal	Average Rate
	31/03/25	31/03/25	31/03/2024	31/03/2024
<b>External Debt</b>				

General Fund Borrowing	£190.59m	3.49%	£175.79m	3.42%
Housing Revenue Account (HRA) Borrowing	£140.86m	3.33%	£149.26m	3.31%
Total Borrowing	£331.45m	3.42%	£325.05m	3.37%
Other Long-term Liabilities inc. PFI	£46.74m		£41.74m	
Total External Debt	£378.19m		£366.79m	
<b>Investments</b>				
Investment balance	£10.09m	4.89%	£5.04m	4.86%
<b>Net Treasury Position</b>				
Debt less Investments	£368.10m		£361.75m	

**Table 2 summary of year end treasury position as at 31<sup>st</sup> March 2025**

## Investment Portfolio Outturn 2024/25

17. The Treasury Management Strategy Statement includes the Council's Annual Investment Strategy outlining the Council's investment priorities as follows:
  - Security of capital
  - Liquidity
  - Yield
18. The Council's investment policy is governed by MHCLG guidance and sets out the approach for choosing investment counterparties based on credit ratings provided by the three main credit rating agencies, supplemented by additional market data, (such as rating outlooks, credit default swaps, bank share prices etc.). The Council will also consider environmental, social and governance factors when placing investments after the core investment priorities of security, liquidity and yield have been assessed.
19. The Council continues to aim to achieve the optimum return (yield) on investments commensurate with the proper levels of security and liquidity and the Council's risk appetite.
20. The investment activity during the financial year 2024/25 conformed to the approved strategy, and the Council had no liquidity difficulties.
21. Investment returns the Council earns on its surplus cash is dependent on the level of cash held for investment purposes, cash backed reserves and cash flow requirements and is due to the timing of precept payments, receipt of grants, receipt of developer contributions, borrowing for capital purposes, payments to its suppliers of goods and services and spend progress on the

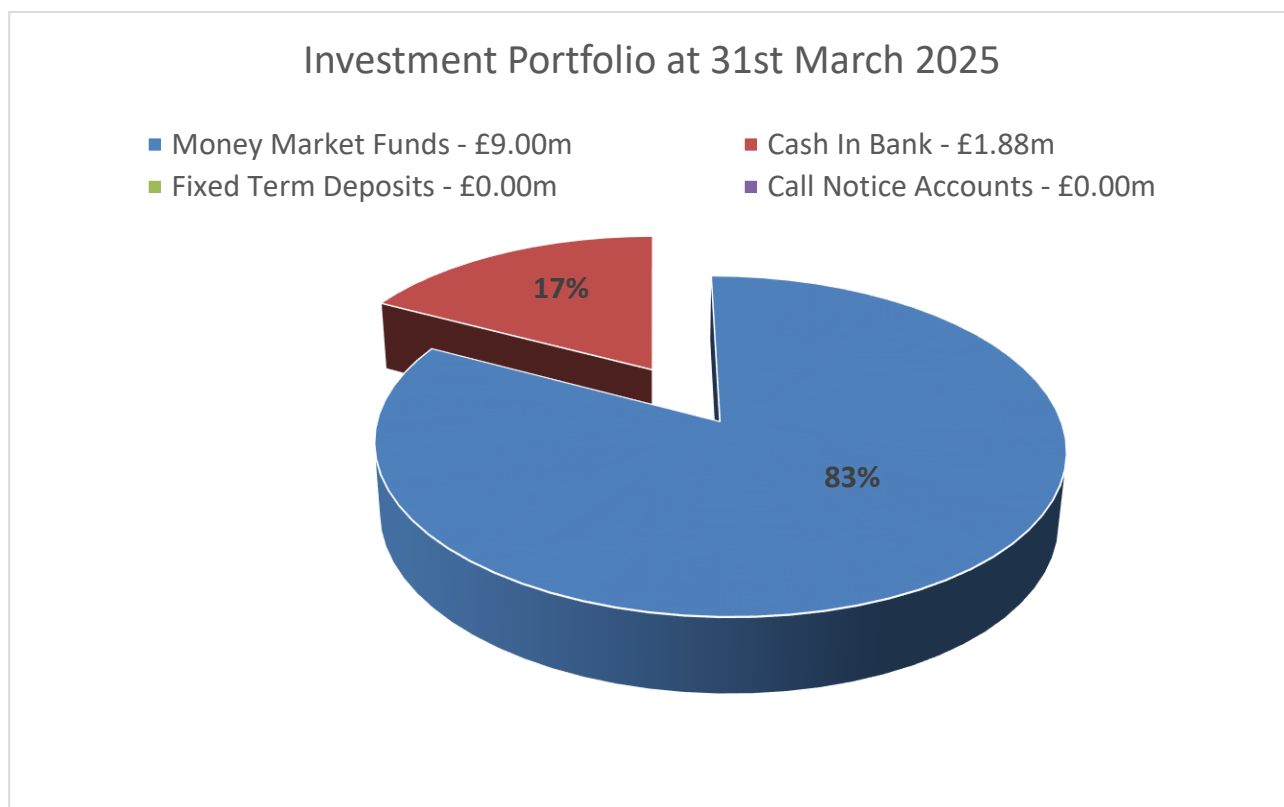
Capital Programme. Cash balances are therefore only available on a temporary basis depending on cash flow movement.

22. Table 3 shows the current fixed term investments at 31<sup>st</sup> March 2025.

Institution Type	Principal Balance 31/03/25	Average Balance 01/04/24-31/03/25	Average Rate 01/04/24-31/03/25	Principal Balance 31/03/24	Average Principal 01/04/23-31/03/24	Average Rate 01/04/23-31/03/24
Fixed Term Deposits	£0.00m	£0.00m	0.00%	£0.00m	£0.00m	0.00%
Call / Notice	£0.00m	£0.00m	0.00%	£0.00m	£0.00m	0.00%
Money Market Funds	£9.00m	£28.62m	4.95%	£4.60m	£22.87m	5.02%
Cash in bank	£1.88m	£0.50m	0.00%	£0.44m	£0.37m	0.00%
Total Investments	£10.88m	£29.12m	4.89%	£5.04 m	£23.34m	4.86%

**Table 3: Investment Portfolio by type at 31<sup>st</sup> March 2025**

23. Figure 1 shows the investments portfolio held corporately by the Councils Treasury Management team split by cash in bank, deposits in short term call accounts, fixed term investments and Money Market Funds. Money Market Funds used have an AAAm credit rating and the cash in bank account has an AA- credit rating.



**Figure 1 Investment Portfolio by type at 31<sup>st</sup> March 2025**

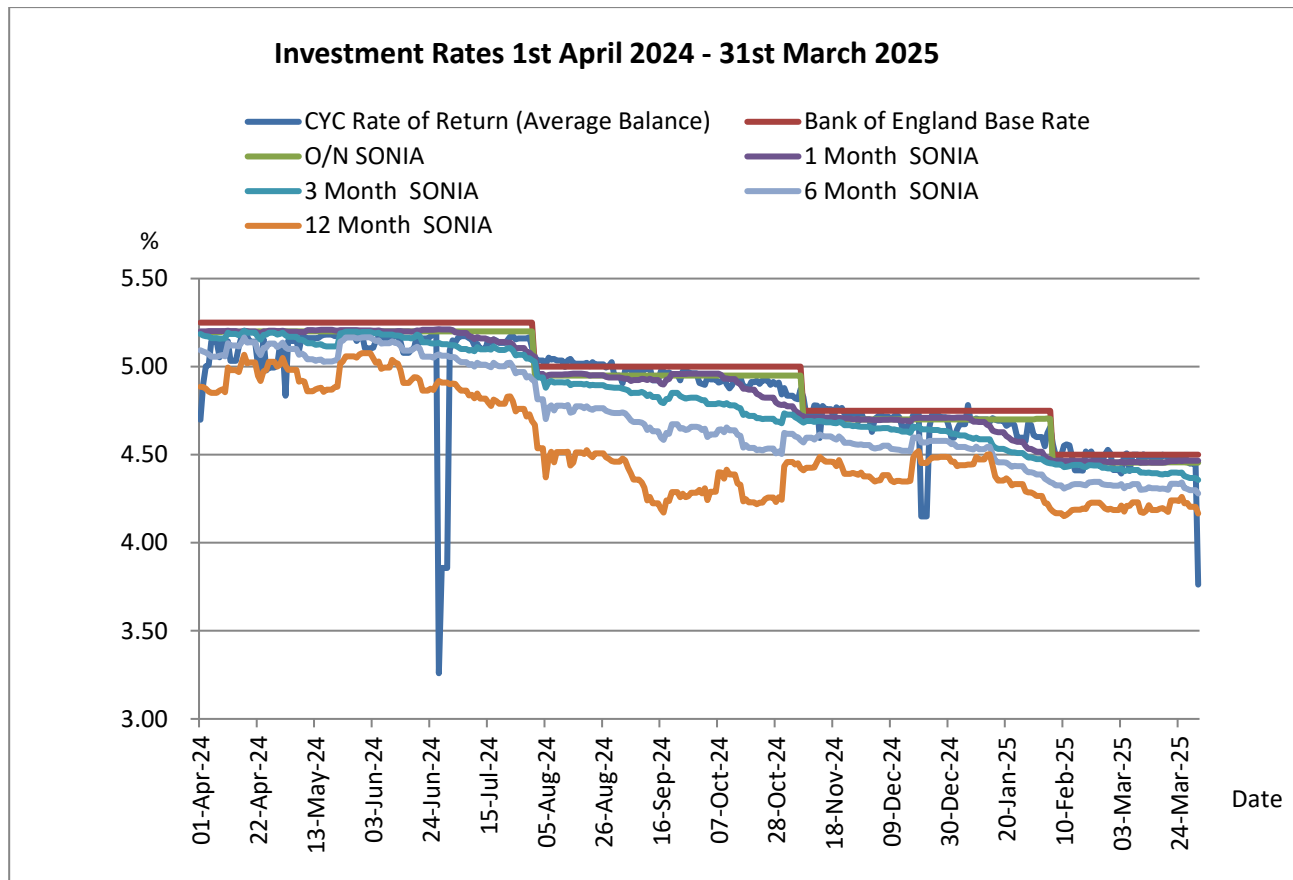
24. The Council maintained an average investment balance of £29.108m in 2024/25 compared to £23.238m in 2023/24. The surplus funds earned an average rate of return of 4.89% in 2024/25 compared to 4.86% in 2023/24. During 2024/25 all cash has been kept in liquid investments which has meant investments returns are not as high as market averages.
25. The level of average cash balances has increased slightly when compared to 2023/24 as borrowing to support the Council's capital programme spending has been taken in addition to the refinancing of the 2023/24 debt. Due to the timing of when debt has been drawn down and cash flow requirements, this has contributed to a slightly higher level of cash available for investment in 2024/25 although as interest rates available for investment balances have fallen the average rate of return in 2024/25 has stayed broadly similar to that seen in 2023/24 when the cash balances available for investment were lower but interest rates available were higher.
26. The Council uses a benchmark indicator to assess the Council's investment performance, and this is the average Sterling Overnight Index Average (SONIA). SONIA is based on actual transactions reflecting the average of the interest rates that banks pay to borrow sterling overnight.
27. The Council's average rate of return during 2024/25 is shown in table 4:

	<b>2024/25 (Full year)</b>	<b>2023/24 (Full year)</b>
Average CYC Rate of Return	4.89%	4.86%
<b>Benchmark</b>		
Average Overnight SONIA	4.90%	4.96%

**Table 4: CYCs investment rate of return performance vs. SONIA benchmark**

28. The average rate of return achieved for invested cash in 2024/25 has slightly increased compared to the average seen in 2023/24, due to the slightly higher cash balances available for investment despite interest rates available for investment now decreasing in line with base rate. The Council has kept cash in highly liquid Money Market Funds which provide instant access to cash. There is a slight time lag between the interest earned from investing in these Money Market Funds compared to the movements in base rate and overnight SONIA as Money Market Funds adjust their portfolios in a rising and falling interest rate environment.
29. Figure 2 shows the average SONIA rates for a number of investment durations compared with the Bank of England base rate and the Council's rate of return for the financial year 2024/25. It shows that the Council's average rate of return over the course of the financial year is tracking lower than, but

broadly in line with, both Bank base rate and overnight SONIA rate. This is expected as cash has been held in liquid funds.



**Figure 2 CYC Investments vs Bank of England base rate and SONIA up to 31<sup>st</sup> March 2025**

## Borrowing Requirement and Debt 31<sup>st</sup> March 2025

30. The Council undertakes long-term borrowing in accordance with the investment requirements of the capital programme and all borrowing is therefore secured for the purpose of its asset base.
31. Under regulation, the Council can borrow in advance of need and Markets are therefore constantly monitored and analysed to ensure that advantage is taken of favourable rates and the increased borrowing requirement is not as dependant on interest rates in any one year.
32. The level of borrowing taken by the Council is determined by the Capital Financing Requirement (CFR) which is the Councils underlying need to borrow for capital expenditure purposes. Borrowing needs to be affordable, sustainable and prudent.

33. On the reverse side, the Council's level of borrowing can also be below the Capital Financing Requirement. This would mean that instead of increasing the Council's level of borrowing, surplus funds held for investment purposes would be utilised.

34. Table 5 shows the Council's underlying need to borrow to finance capital expenditure (the CFR).

	<b>31 March 2025 Actual (31 March 2025)</b>	<b>31 March 2025 Budget (As at TMSS)</b>	<b>31 March 2024 Actual (As at Outturn)*</b>
CFR General Fund	£323.78m	£399.76m	£313.16m
CFR HRA	£139.91m	£149.33m	£147.34m
CFR Other Long-term Liabilities	£46.74m	£43.21m	£41.74m
<b>Total CFR</b>	<b>£510.43m</b>	<b>£592.30m</b>	<b>£502.24m*</b>

**Table 5 Capital Financing Requirement 31<sup>st</sup> March 2025**

\*A £0.8k adjustment was made to the 2023/24 CFR of £503.04m reported in the 2023/24 Treasury Outturn report to give the final 2023/24 CFR of £502.24m reported in the above table.

35. The borrowing strategy takes into account the borrowing requirement, the current economic and market environments and is also influenced by the interest rate forecast.

36. During 2024/25, the Council maintained an under-borrowed position. This meant that the capital borrowing need (the CFR) was not fully funded with loan debt, as cash supporting the Council's reserves, balances and cash flow was used as an interim measure. The under-borrowed position can be seen on the Councils Liability Benchmark graph as shown by the gap between the loans outstanding and CFR. This strategy was still prudent in 2024/25 as long-term borrowing rates have remained elevated across the curve.

37. Current PWLB borrowing rates remain elevated and while slight decreases have been seen during 2024/25 borrowing rates have not fallen as fast as predicted by the markets and forecasts have been revised to show borrowing rates remaining higher for longer, and while still forecasted to decrease over the medium and longer term, they are forecast to do so at a slower pace, with the expectation of gradual falls through 2025 and 2026. The reason for this is the current economic environment and the gilt market which PWLB rates are based on. As a general rule, short-dated gilt yields will reflect expected movements in Bank Rate, whilst medium to long-dated yields are driven primarily by the inflation outlook.

38. Where debt is required to finance the capital programme the Treasury team look at temporary and short-term borrowing options if internal borrowing cannot be maintained and also look out for, and at, opportunities to draw

down long term debt at more favourable rates should the opportunities arise through either PWLB or market borrowing in order to try to minimise the longer-term impact of debt costs.

39. The timing of when that debt is drawn down depends on the progress of the capital programme and the level of internal borrowing available financed by cash. Cash balances and internal borrowing were used in 2024/25, where cash flow allowed, to finance the capital programme and fund the under-borrowed position.
40. New borrowing was required in the first quarter and last quarter of 2024/25. The Council has taken six new loans from the PWLB which will require refinancing in 2025/26 (see Table 7). This has increased the Council's refinancing interest rate risk as a greater proportion of its overall debt will mature in 2025/26 (see figure 4), however this is still within the approved maturity limits set as part of Prudential Indicator 8.
41. The decision to take short term 1 year debt from PWLB was felt prudent as borrowing rates have remained elevated throughout 2024/25 (as noted in paragraph 37) and refinancing maturing loans on short maturity durations was a better option for the longer-term Treasury Management budget, meaning that higher interest rate loans mature sooner.
42. There is a continued element of interest rate risk to the Councils strategy of refinancing maturing 1 year loans short term, using internal borrowing and cash balances and delaying taking on long term debt. This is because the Council will have a cash requirement and refinancing requirement for a larger proportion of debt sooner (as can be seen in Figure 4) and will be more dependent on both borrowing rates available and movement in borrowing rates in the short term.
43. At the point of debt drawdown in 2024/25 interest rate forecasts showed a gradual decrease throughout 2025/26. If this occurs, then borrowing rates should be cheaper when refinancing the maturing 2024/25 1 year PWLB loans.
44. Treasury officers keep the overall borrowing portfolio position monitored to ensure any opportunities for longer term debt at favourable rates are considered and that loan maturities are within the approved maturity limits set as part of Prudential Indicator 8.

## **Borrowing Portfolio Outturn 2024/25**

45. The Councils long-term borrowing started the year at a level of £325.05m. The current borrowing portfolio position as at 31<sup>st</sup> March 2025 is £331.45m.



	31 <sup>st</sup> March 2025			31 <sup>st</sup> March 2024		
Institution Type	No. of Loans	Principal	Average Rate	No. of Loans	Principal	Average Rate
<b><u>Public Works Loan Board</u></b> PWLB – Money borrowed from the Debt Management Office (HM Treasury)	56	£324.10m	3.44%	59	£317.70m	3.38%
<b><u>Market Loans</u></b> LOBO Loans – Lender Option Borrower Option	1	£5.00m	3.88%	1	£5.00m	3.88%
<b><u>West Yorkshire Combined Authority</u></b> WYCA – Zero interest loans the purpose of which are to help to fund York Central infrastructure projects.	4	£2.35m	0.00%	4	£2.35m	0.00%
<b>Total Borrowing (GF &amp; HRA)</b>	<b>61</b>	<b>£331.45m</b>	<b>3.42%</b>	<b>64</b>	<b>£325.05m</b>	<b>3.37%</b>

**Table 6 Current borrowing position 31<sup>st</sup> March 2025**

46. During financial year 2024/25 6 new loans were taken totalling £49.80m. This borrowing was forecast and anticipated (see paragraph 39). The associated revenue implications were included in the annual budget setting process. These loans are detailed in the Table 7 below.

Lender	Issue Date	Repayment Date	Amount	Rate	Duration (years)
PWLB	30/04/2024	30/04/2025	£10.00m	5.39%	1.00
PWLB	26/02/2025	26/02/2026	£10.00m	4.89%	1.00
PWLB	28/02/2025	28/02/2026	£10.00m	4.88%	1.00
PWLB	21/03/2025	21/03/2026	£10.00m	4.84%	1.00
PWLB	28/03/2025	28/03/2026	£5.00m	4.89%	1.00
PWLB	28/03/2025	28/03/2026	£4.80m	4.49%	1.00
			<b>£49.80M</b>		

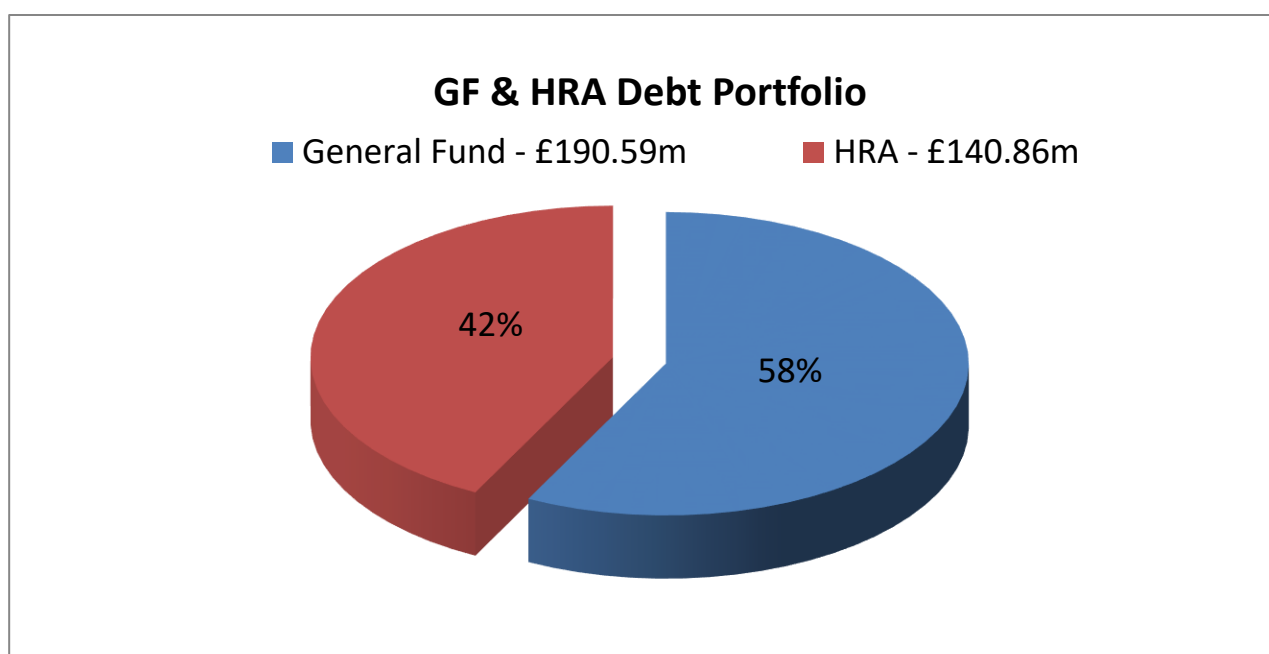
**Table 7 New loans 2024/25**

47. During financial year 2024/25 the following 9 existing loans matured. The total of maturing loans was £43.40m. These are detailed in the Table 8 below.

Lender	Issue Date	Repayment Date	Amount	Rate	Duration (years)
PWLB	13/10/2009	13/10/2024	£3.00m	3.910%	15.00
PWLB	23/11/2000	05/11/2024	£1.00m	4.750%	23.95
PWLB	03/04/2001	05/11/2024	£1.00m	4.750%	23.59
PWLB	29/01/2024	29/01/2025	£10.00m	5.350%	1.00
PWLB	28/02/2024	28/02/2025	£10.00m	5.460%	1.00
PWLB	27/03/2024	27/03/2025	£5.20m	5.390%	1.00
PWLB	27/03/2024	27/03/2025	£4.80m	4.990%	1.00
PWLB	28/03/2012	31/03/2025	£4.00m	2.870%	13.01
PWLB	28/03/2012	31/03/2025	£4.40m	2.870%	13.01
			<b>£43.40m</b>		

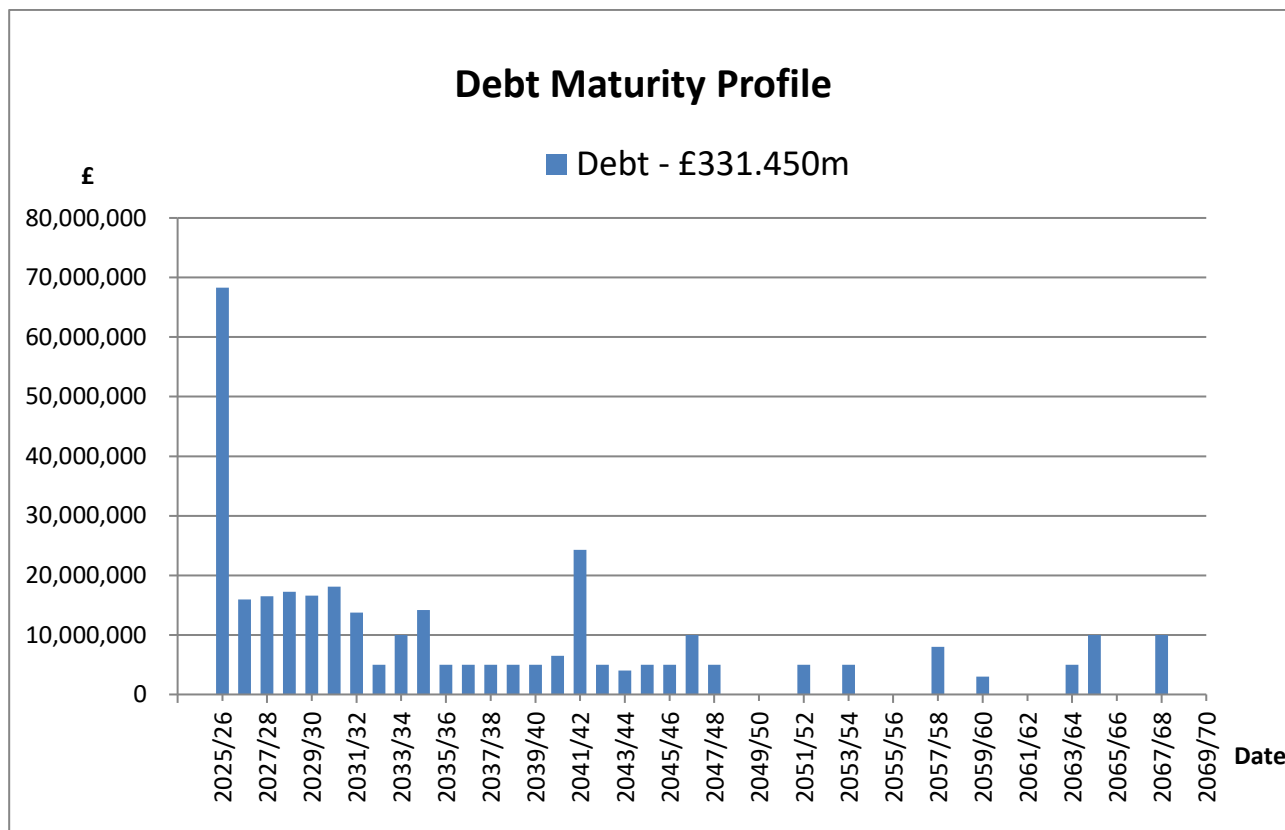
**Table 8 Maturing loans in 2024/25**

48. Refinancing of PWLB 1 year loans from 2023/24 in 2024/25 have been taken at lower rates than the previous years loans (as seen Table 7 and 8).
49. No loan rescheduling was carried out during the financial year 2024/25.
50. The Councils £331.45m of fixed interest rate debt, is split between £140.86m for HRA (£111.25m self-financing debt) and £190.59m for General Fund as shown in Figure 3.



**Figure 3 General Fund and HRA debt 31<sup>st</sup> March 2025**

51. Figure 4 illustrates the 2024/25 maturity profile of the Council's debt portfolio at 31<sup>st</sup> March 2025. The maturity profile, with the exception of 2025/26 which contains the maturing £49.80 PWLB 1 year loans taken in 2024/25 (shown in Table 7), shows that there is no large concentration of loan maturity in any one year, thereby spreading the interest rate risk dependency.



**Figure 4 – Debt Maturity Profile at 31<sup>st</sup> March 2025**

52. Table 9 shows PWLB Certainty borrowing rates available for selected loan durations between 1<sup>st</sup> April 2024 and 31<sup>st</sup> March 2025 at the highest, lowest and average rates.

	<b>PWLB Certainty borrowing rates by duration of loan</b>				
	<b>1 Year</b>	<b>5 Year</b>	<b>10 Year</b>	<b>25 Year</b>	<b>50 Year</b>
High	5.61%	5.34%	5.71%	6.18%	5.88%
Low	4.77%	4.31%	4.52%	5.08%	4.88%
Average	4.95%	4.86%	5.07%	5.56%	5.32%

**Table 9 – PWLB Borrowing Rates 1<sup>st</sup> April 2023 to 31<sup>st</sup> March 2024**

## **Compliance with Treasury policy Prudential Indicators**

53. The Prudential Indicators for 2024/25 included in the Treasury Management Strategy Statement (TMSS) are based on the requirements of the Council's capital programme and approved at Budget Council on 22<sup>nd</sup> February 2024 and can be viewed here

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=331&MID=13928#A167008> and here  
<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=13934&Ver=4>.

54. The Treasury Management budget was set in light of the council's expenditure plans and the wider economic market conditions, based on advice from MUFG Corporate Markets (formerly Link Group).
55. It is a statutory duty for the Council to determine and keep under review the "Affordable Borrowing Limits" included in the Prudential Indicators. During the financial year 2024/25 the Council has operated within the treasury limits and Prudential Indicators set out.
56. An update of the Prudential Indicators is shown in Annex A.

## **Consultation Analysis**

57. At a strategic level, there are a number of Treasury Management options available that depend on the Council's stance on interest rate movements. The Treasury Management function of any business is a highly technical area, where decisions are often taken at very short notice in reaction to the financial markets. As outlined in the Treasury Management Strategy Statement (TMSS) to enable effective treasury management, all operational decisions are delegated by the Council to the Director of Finance who operates within the framework set out in the TMSS and through the Treasury Management Policies and Practices. In order to inform sound treasury management operations, the Council works with its treasury management advisers, MUFG Corporate Markets (formerly Link Group).

## **Options Analysis and Evidential Basis**

58. Treasury Management strategy and activity is influenced by the capital investment and revenue spending decisions made by the Council. Both the revenue and capital budgets have been through a corporate process of consultation and consideration by the elected politicians.
59. The Treasury Management annual report and Prudential Indicators details the treasury management portfolio at 31st March 2025 and is for the review of the Executive Member for Finance to show compliance with Treasury policy and ensure the continued performance of the Treasury Management function.

## Organisational Impact and Implications

60. The Treasury Management function aims to achieve the optimum return on investments commensurate with the proper levels of security, and to minimise the interest payable by the Council on its debt structure. It thereby contributes to all Council Plan priorities.

- ***Financial*** - The financial details of the Treasury Management annual report are contained in the body of the report.
- ***Human Resources (HR)*** - n/a
- ***Legal*** – Treasury Management activities have to conform to the Local Government Act 2003, the Local Authorities (Capital; Finance and Accounting) (England) Regulations 2003 (SI 2003/3146), which specifies that the Council is required to have regard to the CIPFA Prudential Code and the CIPFA Treasury Management Code of Practice and also the Local Authorities (Capital Finance and Accounting) (England) (Amendment) Regulations 2008 (SI 2008/414), which clarifies the requirements of the Minimum Revenue Provision guidance.
- ***Procurement*** - n/a
- ***Health and Wellbeing*** - n/a
- ***Environment and Climate action*** - n/a
- ***Affordability*** - The financial implications of the Treasury Management annual report are contained in the body of the report and as set out in the Prudential Indicators at Annex A.
- ***Equalities and Human Rights*** - n/a
- ***Data Protection and Privacy*** - n/a
- ***Communications*** - n/a
- ***Economy*** - n/a.
- ***Specialist Implications Officers*** - n/a

## Risks and Mitigations

61. The Treasury Management function is a high-risk area because of the volume and level of large money transactions. As a result, there are procedures set out for day-to-day Treasury Management operations that aim to reduce the risk associated with high volume high value transactions as set out as part within the Treasury Management Strategy Statement at the start of each financial year. As a result of this the Local Government Act 2003 (as amended), supporting regulations, the CIPFA Prudential Code and the CIPFA Treasury Management in the Public Services Code of Practice (the code) are all adhered to as required.

## Wards Impacted

All

## Contact details

For further information please contact the authors of this Decision Report.

## Author

<b>Name:</b>	Debbie Mitchell
<b>Job Title:</b>	Director of Finance
<b>Service Area:</b>	Corporate Finance
<b>Email:</b>	Debbie.mitchell@york.gov.uk
<b>Report approved:</b>	Yes
<b>Date:</b>	19/06/25

## Co-author

<b>Name:</b>	Tony Clark
<b>Job Title:</b>	Senior Accounting Technician
<b>Service Area:</b>	Corporate Finance
<b>Email:</b>	Tony.clark@york.gov.uk
<b>Report approved:</b>	Yes
<b>Date:</b>	19/06/25

## Background papers

- Treasury Management Strategy Statement and Prudential Indicators for 2024/25 to 2028/29 and Annexes A, B, C and D to that report.  
<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=13934&Ver=4>.

## Annexes

- Annex A – Prudential Indicators 2024/25 Outturn (31.03.25)

## Glossary of Abbreviations used in the report

CIPFA	Chartered Institute of Public Finance & Accountancy
CFR	Capital Financing Requirement
CPI	Consumer Prices Index
CYC	City of York Council
GDP	Gross Domestic Product
GF	General Fund
HRA	Housing Revenue Account
MHCLG	Ministry of Housing, Communities and Local Government
MPC	Monetary Policy Committee
MRP	Minimum Revenue Provision
PWLB	Public Works Loan Board
SONIA	Sterling Overnight Index Average
TMSS	Treasury Management Strategy Statement

This page is intentionally left blank



## Prudential Indicators 2024/25 Outturn (31.03.25)

	Prudential Indicator		2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
1	<b>Capital Expenditure</b> To allow the authority to plan for capital financing as a result of the capital programme and enable the monitoring of capital budgets.	GF HRA Other LT Total	£44.7m £29.3m £3.2m £77.2m	£134.2m £42.0m £0.5m £176.7m	£71.5m £15.0m £0.5m £87.0m	£51.1m £15.9m £0.5m £67.5m	£35.8m £13.1m £0.5m £49.4m	£28.1m £13.0m £0.5m £41.6m
2	<b>CFR</b> Indicates the Council's underlying need to borrow money for capital purposes. The majority of the capital programme is funded through government support, government grant or the use of capital receipts. The use of borrowing increases the CFR.	GF HRA Other LT Total	£323.8m £139.9m £46.7m £510.4m	£391.3m £137.2m £45.4m £573.9m	£410.4m £138.7m £44.1m £593.2m	£422.1m £141.7m £42.8m £606.6m	£434.5m £141.7m £41.6m £617.8m	£440.8m £141.7m £40.2m £622.7m
3	<b>Liability Benchmark</b> The Liability Benchmark is based on current capital plans and cash flow assumptions, therefore giving the Council an indication of how much it needs to borrow, when it is likely to need to borrow, and where to match maturities to its planned borrowing needs. The liability benchmark makes no assumption about the level of future prudential borrowing in unknown capital budgets.	<p><b>Liability Benchmark</b></p> <p>The chart displays the Total Amount (£'000) on the Y-axis (ranging from £0 to £700,000) against the year on the X-axis (ranging from 2024 to 2094). The chart shows the following components:</p> <ul style="list-style-type: none"> <li><b>PWLB Loans</b> (Blue bars): Shows a peak around 2028/29 and then a steady decline.</li> <li><b>LOBO Loans</b> (Dark blue line): Shows a peak around 2028/29 and then a steady decline.</li> <li><b>Variable rate loans</b> (Light blue line): Shows a peak around 2028/29 and then a steady decline.</li> <li><b>Market Loans (excl LOBO loans)</b> (Orange line): Shows a peak around 2028/29 and then a steady decline.</li> <li><b>Short Term inc LA Temporary Borrowing (&lt;1 year)</b> (Light orange line): Shows a peak around 2028/29 and then a steady decline.</li> <li><b>Existing Loan Debt Outstanding</b> (Black line): Shows a steady decline over time.</li> <li><b>Loans CFR</b> (Dark blue line): Shows a steady decline over time.</li> <li><b>Net Loans Requirement (forecast net loan debt)</b> (Red line): Shows a peak around 2028/29 and then a steady decline.</li> <li><b>Liability Benchmark (Gross Loans Requirement)</b> (Red dashed line): Shows a peak around 2028/29 and then a steady decline.</li> </ul>						
4	<b>Ratio of Financing Costs to Net Revenue Stream</b> An estimate of the cost of borrowing in relation to the net cost of Council services to be met from government grant and council taxpayers. In the case of the HRA the net	GF HRA Total	12.94% 13.52% 13.06%	14.68% 13.21% 14.40%	18.06% 12.88% 17.06%	18.88% 12.63% 17.70%	19.45% 12.39% 18.14%	19.80% 12.14% 18.41%

	Prudential Indicator		2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
	revenue stream is the income from rents. <i>Note that financing costs include debt and other long-term liabilities such as PFI and Leases.</i>							
5	<b>External Debt</b> To ensure that borrowing levels are prudent over the medium term the Council's external borrowing, net of investments, must only be for a capital purpose and so not exceed the CFR.	Gross Debt  Invest  Net Debt	£374.7m  £10.1m  £364.6m	£471.2  £5.0m  £466.2m	£499.0m  £5.0m  £494.0m	£524.8m  £5.0m  £519.8m	£549.5m  £5.0m  £544.5m	£585.8m  £5.0m  £580.8m
6 a	<b>Authorised Limit for External Debt</b> The authorised limit is a level set above the operational boundary in acceptance that the operational boundary may well be breached because of cash flows. It represents an absolute maximum level of debt that could be sustained for only a short period of time. The council sets an operational boundary for its total external debt, gross of investments, separately identifying borrowing from other long-term liabilities.	Borrowing CFR / Other long-term liabilities	£602.3m  £30.0m  £632.3m  (£632.3m set at 2024/25 Strategy)	£583.9m  £30.0m  £613.9m  (Based on current CFR projection)	£603.2m  £30.0m  £633.2m  (Based on current CFR projection)	£616.6m  £30.0m  £646.6m  (Based on current CFR projection)	£627.8m  £30.0m  £657.8m  (Based on current CFR projection)	£632.7m  £30.0m  £662.7m  (Based on current CFR projection)

	Prudential Indicator		2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
6 b	<b>Operational Boundary for External Debt</b> The operational boundary is a measure of the most likely, prudent, level of debt. It takes account of risk management and analysis to arrive at the maximum level of debt projected as part of this prudent assessment. It is a means by which the authority manages its external debt to ensure that it remains within the self-imposed authority limit. It is a direct link between the Council's plans for capital expenditure; our estimates of the capital financing requirement; and estimated operational cash flow for the year.	Borrowing CFR / Short Term Liquidity Requirement	£510.4m  £91.9m  £602.3m  (£602.3m set at 2024/25 Strategy)	£573.9m  £10.0m  £583.9m  (Based on current CFR projection)	£593.2m  £10.0m  £603.2m  (Based on current CFR projection)	£606.6m  £10.0m  £616.6m  (Based on current CFR projection)	£617.8m  £10.0m  £627.8m  (Based on current CFR projection)	£622.7m  £10.0m  £632.7m  (Based on current CFR projection)

	Prudential Indicator		2021/22	2022/23	2023/24	2024/25	2025/26	
7	<b>Maturity Structure of Borrowing</b> To minimise the impact of debt maturity on the cash flow of the Council. Over exposure to debt maturity in any one year could mean that the Council has insufficient liquidity to meet its repayment liabilities, and as a result could be exposed to risk of interest rate fluctuations in the future where loans are maturing. The Council therefore sets limits whereby long-term loans mature in different periods thus spreading the risk.	Maturity profile of debt against approved limits	Maturity Profile	Debt (£)	Debt (%)	Approved Minimum Limit	Approved Maximum Limit	
			Less than 1 yr	£68.3m	21%	0%	30%	In line with the TMSS Lobo loans are shown as due at their next call date as this is the date the lender could require payment.
			1 to 2 yrs	£16.0m	5%	0%	30%	
			2 to 5 yrs	£50.4m	15%	0%	40%	
			5 to 10 yrs	£61.0m	18%	0%	40%	
			10 yrs and above	£135.8m	41%	30%	90%	
			Total	£331.5m	100%	-	-	
7	<b>Upper Limit for Total Principal Sums Invested for Over 364 Days</b> The Council sets an upper limit for each forward financial year period for the level of investments that mature in over 364 days. These limits reduce the liquidity and interest rate risk associated with investing for more than one year.	Limit / (Current investments greater than 364 days maturing in year)	£15.0m	£15.0m	£15.0m	£15.0m	£15.0m	£15.0m
			(£0.0m)	(£0.0m)	(£0.0m)	(£0.0m)	(£0.0m)	(£0.0m)



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15/07/2025
<b>Report of:</b>	Director of Finance – Debbie Mitchell
<b>Portfolio of:</b>	Cllr Katie Lomas - Executive Member for Finance, Performance, Major Projects, Human Rights, Equalities and Inclusion

## **Decision Report: CAPITAL PROGRAMME OUTTURN 2024/25 AND REVISIONS TO THE 2025/26– 2029/30 PROGRAMME**

### **Subject of Report**

1. The purpose of this report is to set out the capital programme outturn position for 2024/25 including any under/overspends and adjustments, along with an update to the future years programme.
2. The report contains details of the capital investment made during 2024/25 and how this has supported delivery of the Council Plan. Key areas of investment are listed below with further details contained in the body of the report.
  - £6.5m on the expansion and improvement of school facilities across the city
  - £10.8m on construction and development of new council housing
  - £2.9m on purchasing and upgrading new houses for shared ownership
  - £9.0m on the modernisation of and ongoing repairs to council homes
  - £9.5m on capital investment on the council's highway network including roads, bridges, drainage and lighting
  - £7.4m improvements at Station Gateway
  - £2.1m on new Library facilities

3. Some of the direct outcomes of the investment include
- Building new science labs at Huntington School
  - Finalisation of major expansion at Fulford School
  - Improvements to primary schools at Clifton Green, Westfield, Wigginton and Yearsley Grove
  - Construction nearing completion on new Passivhaus affordable housing at Duncombe Barracks and Burnholme
  - Work commenced on major refurbishment schemes in Bell Farm and also Glen Lodge
  - 318 private properties and 58 council properties supported with adaptation works to their homes
  - New Library and Community Facilities at Clifton opened to the public
  - Commencement of Mansion House repairs scheme
  - Speed limit restrictions introduced at 10 new sites
  - 12 carriageway schemes completed including 37,500 square metres of refurbished roads
  - 10 Large Patching Schemes completed with a total area of 20,000 square metres
  - 4 Surface Dressing schemes covering an area of 43,3500 square metres
  - 6 new footpath schemes completed
  - 20 drainage improvement schemes completed
  - 347 old street lighting columns replaced
  - New LED lighting at West Offices and Hazel Court reducing energy use and cost

## **Benefits and Challenges**

4. The capital programme is key in delivering the Council Plan. Members are able to prioritise capital expenditure to deliver improvements across all service areas notably Schools, Housing, Transport and Regeneration as well as supporting Climate Change ambitions.
5. The programme does involve significant levels of council borrowing which impacts the level of revenue expenditure. The cost of delivering the capital programme is therefore dependent on levels of external funding, inflation levels and interest rates.

## **Policy Basis for Decision**

6. This report is to note the outturn position for 2024/25 and agree to slippage where necessary to deliver the projects which support the delivery of the council plan.

## **Financial Strategy Implications**

7. This report needs to be read alongside the Finance and Performance Outturn report elsewhere on the agenda. This report identifies slippage on schemes but also the impact that delays have had on projects in terms of delivery.
8. The slowdown in the capital programme over the second half of the year has reduced the need for external borrowing. Capital expenditure funded by borrowing was estimated to be £44m at Monitor 1 whereas the year end position showed capital expenditure funded by borrowing totalled £18m. This has supported the savings across Treasury Management that has supported the overall council revenue position.

## **Recommendations and Reasons**

9. Executive is asked to:
  - Note the 2024/25 capital outturn position of £74.019m and approve the requests for re-profiling totalling £31.193m from the 2024/25 programme to future years.
  - Note the adjustments to schemes increasing expenditure in 2024/25 by a net £2.365m
  - Recommend to Full Council the restated 2025/26 to 2029/30 programme of £426.917m as summarised in Table 3 and detailed in Annex 1

Reason: to enable the effective management and monitoring of the Council's capital programme

## **Background**

10. The 2024/25 capital programme was approved by Council on 22 February 2024 and updated for amendments reported to Executive in

the 2023/24 outturn report, which resulted in an approved capital budget for 2024/25 of £215.874m.

11. At Monitor 1 report (September 12<sup>th</sup>, 2024) there was a decrease of £81.72m resulting in a revised capital programme of £134.154m.
12. At Monitor 2 report (November 14<sup>th</sup>, 2024) there was a decrease of £10.384m resulting in a revised capital programme of £123.770m.
13. At Monitor 3 report (January 21<sup>st</sup>, 2025) there was a further decrease of £20.923m resulting in a revised capital programme of £102.847m.
14. The report shows an outturn of £74.019m compared to an approved budget of £102.847m, an overall reduction of £28.828m. The revisions in the report show a revised start budget for 2025/26 totalling £180.922m.
15. The net variation of £28.828m is made up as follows:
  - Proposals to re-profile budgets of £31.193m of schemes from 2024/25 to future years (currently approved budgets in the capital programme, but requires moving to or from future years in line with a changing timetable of delivery for individual schemes)
  - Adjustments to schemes increasing expenditure by a net £2.365m, mainly due to additional grant funding being received and adjustments relating to the Housing Shared Ownership scheme and additional DFE funding to support school investment
16. The level of re-profiling reflects the scale of the capital programme, and that it contains a number of major and complex projects. The overall capital programme continues to operate within budget, due to careful management of expenditure against the budget.
17. The main areas of re-profiling included within the £31.193m include:
  - £2.785m – Local Authority Homes – Phase 2
  - £1.730m – Replacement Vehicles & Plant
  - £1.305m – Major Repairs & Modernisation of Local Authority Homes
  - £1.180m – Integrated Transport



- £1.149m – LA homes Energy Efficiency Programme
- £1.054m – Home upgrade grant
- £0.997m – Alex Lyon House – Renewable Heating Upgrade
- £0.937m – Duncombe Barracks
- £0.851m – Bus service improvement plan
- £0.821m – Highway Schemes

18. Table 1 outlines the variances reported against each portfolio area.

Department	Current Approved Budget £m	Outturn £m	Increase/ decrease £m	Reprofile £m	Total Variance £m	Paragraph Ref
Children's services	11.063	6.497	<b>0.356</b>	<b>(4.922)</b>	<b>(4.566)</b>	20 – 47
Adult Social Care	1.099	0.902	<b>0.012</b>	<b>(0.209)</b>	<b>(0.197)</b>	48 – 49
Housing	42.817	31.667	<b>1.530</b>	<b>(12.680)</b>	<b>(11.150)</b>	50 – 78
Communities	4.100	2.916	<b>0.246</b>	<b>(1.430)</b>	<b>(1.184)</b>	79 – 87
Transport & Env	34.685	26.337	<b>0.264</b>	<b>(8.612)</b>	<b>(8.348)</b>	88 – 143
City Development	2.310	2.012	<b>0.129</b>	<b>(0.427)</b>	<b>(0.298)</b>	144 – 153
Property Services	2.304	1.700	-	<b>(0.604)</b>	<b>(0.604)</b>	154 – 159
ICT	2.923	1.988	<b>0.004</b>	<b>(0.939)</b>	<b>(0.935)</b>	160 – 165
Corporate Services	1.546	0.000	<b>(0.176)</b>	<b>(1.370)</b>	<b>(1.546)</b>	
<b>Total</b>	<b>102.847</b>	<b>74.019</b>	<b>2.365</b>	<b>(31.193)</b>	<b>(28.828)</b>	

Table 1 Capital Programme Outturn 2024/25

## Consultation Analysis

19. The capital programme was developed under the capital budget process and agreed by Council on 22 February 2024. Whilst the capital programme as a whole is not consulted on, the individual scheme proposals and associated capital receipt sales do follow a consultation process with local Councillors and residents in the locality of the individual schemes.

## Options Analysis and Evidential Basis

### Children and Education Services

20. Total expenditure within the Children's Services and Education Capital Programme for 2024/25 was £6,497k against a latest approved budget of £11,063k.

21. The majority of this expenditure was incurred under five major scheme headings where there was significant work and progress in 2024/25. These schemes were: Schools Condition and Maintenance Works across a number of maintained schools (£2,395k); the building of new Science laboratories at Huntington School (£984k); further building improvement works at Clifton Green Primary (£534k); further works at Applefields School (£470k), and phase 2 of the Enhanced Provision unit at Huntington School (£425k).

### **Scheme Updates**

22. The major expansion at Fulford School is being funded by the local authority to deal with secondary place pressures. The scheme has been organised by South York Academy Trust at their school. The project is complete, however some remaining expenditure will be incurred in 2025/26 so the amount of £232k is required to be re-profiled into 2025/26. As further Section 106 funding has now been received that was earmarked for this expansion, Basic Need funding that was allocated in lieu of receipt of this money (£173k) can now be vired back to the unallocated Basic Need heading.
23. The scheme at Millthorpe School was completed in 2022/23. The remaining budget of £49k in 2024/25 is no longer required as no further costs will be incurred, and the funding can be vired back into unallocated Basic Need.
24. The major upgrade scheme to science labs at Huntington School was successfully carried out in 2024/25. Four of the eight laboratories were refurbished with new central pods for gas, power and water and new furniture installed. New flooring and replacement windows were also installed.
25. Only £168k of the budget for the Danesgate Outdoor Learning Area has been spent in 2024/25, with the remainder requiring reprofiling into 2025/26.
26. The major scheme to remodel classrooms to provide additional classroom space at Hob Moor Oaks Special School began in 2024/25. Phase one, carried out during the year, consisted of remodelling six rooms, three classrooms and their associated support rooms. A further three rooms are scheduled to be remodelled in summer 2025. Budget of £315k needs reprofiling into 2025/26 to fund these ongoing works.

27. The major scheme to provide additional classroom space at St. Oswald's Primary also began in 2024/25. Phase one, carried out during the year, consisted of urgent upgrade works to the kitchen. The construction of two new classrooms, with further modifications, both internal and external, is scheduled to be carried out in 2025/26. The unspent budget of £495k requires reprofiling into 2025/26 to fund the major works over the summer.
28. Investment continued at Clifton Green Primary during 2024/25 with phase 2 of the school re-organisation completed in October 2024.
29. Only £44k of minor expenditure was incurred within the remaining unallocated Basic Need budget so the underspend of £56k plus the effect of the transfers above results in a reprofiling of £322k into 2025/26.
30. At Applefields school, works over summer 2024 works were for the adaptation of a 4<sup>th</sup> classroom (following the 3 classroom adaptations carried out in 2023) to create access to a toilet and quiet room directly off the space, the refurbishment of 4 further classrooms and upgrade of hoist systems. Planned work in 2025/26 involves the refurbishment and adaptation of 3 more classrooms, electrical works, and an upgrade to the hydrotherapy pool.
31. A significant programme of work has been carried out to the maintained school estate under the various School Condition and Maintenance headings in the programme in 2024/25.
32. At Huntington School, the roof of the main hall was replaced. Further roof works were also carried out at Headlands and Yearsley Primary Schools.
33. Ralph Butterfield Primary benefitted from phase 2 of pipework replacement and rewiring, Westfield Primary had the first phase of heating and pipework upgrades completed, and Wigginton Primary had a kitchen refurbishment completed.
34. In addition to the roof works referred to above, Yearsley Grove Primary had a kitchen refurbishment completed and a hot water cylinder replaced.
35. Expenditure in 2024/25 totalled £2,395k, resulting in net reprofiling of £573k into 2025/26. This will fund outstanding payments and

retentions with any remainder available to fund further works in 2025/26 and future years.

36. The 2025/26 Condition and Maintenance budget has been increased by £290k to reflect the Department for Education announcement of the provisional grant allocations for the year. The 2026/27 budget has also been increased to reflect an updated estimate of the potential amount that may be allocated based on the 2025/26 funding levels.
37. No spend was incurred from this budget in 2024/25 so the budget requires reprofiling into 2025/26.
38. Work on the construction of the new annex at St Paul's Nursery has begun, with work commencing in late April, and completion currently scheduled for late autumn 2025. The remaining unspent budget of £118k in 2024/25 needs reprofiling into 2025/26.
39. Under the general SEND investment scheme, no expenditure was incurred in 2024/25. The £50k requires reprofiling into 2025/26 and will be available to contribute to capital works in schools to support the aims of the Safety Valve agreement.
40. The DfE announced an additional amount of SEND capital grant in December 2024, totalling £780m. Allocations from this grant have now been announced, and York will receive an amount of £,1724k in 2025/26. This has been added to the capital programme in this year and officers are currently considering the most appropriate use for this, particularly to support mainstream settings which is an identified DfE priority for this funding.
41. The budget of £946k for SEMH expansion has not been committed at this point so requires reprofiling into 2025/26. This budget will be used in conjunction with the SEND money referred to above.
42. In advance of the focus nationally on mainstream SEND provision York, in 2023/24, created a budget for SEND Mainstream Inclusion, by allocating an amount of Basic Need to support schools in adapting classrooms to become specialist facilities to support young people. In 2024/25 £202k was allocated to schools for such purposes. The remaining £73k requires reprofiling into 2025/26.
43. The Healthy Child Capital Fund (£93k) requires reprofiling into 2025/26 whilst the future use of this budget is planned.

44. The Early Years Expansion scheme is funded from the grant from the DfE provided to support local authorities with potential capital costs to meet the phased expansion of early years childcare provision for working parents of all children 9 months to 3 years old and also for the provision of 8am to 6pm wraparound care for primary aged children. During 2024/25, despite extensive engagement with the market, only a small amount of funding has been awarded and paid out to providers for approved work. The remainder needs to be reprofiled into 2025/26 for further bidding rounds.
45. The Lowfield Green Early Years expansion, fully funded by a Section 106 developer contribution secured towards the creation of 16 new Early Years places as a result of this development has been allocated to a provider and the works successfully completed.
46. The Children in Care Residential Commissioning scheme budget for 2024/25 has been spent mainly on adaptations and fixtures and fittings at Wenlock Terrace. The remaining £164k requires reprofiling into 2025/26 to contribute to further works and the potential purchase of a further property.
47. The Family Hubs budget, funded by grant has all been spent in 2024/25, as a contribution to the overall works being carried at The Avenues Children's Centre

### **Adult Social Care**

48. The disability equipment budget supplies high cost equipment to customers to help them to remain in their own homes. This can be both social care equipment and equipment which is joint funded by health. The social care equipment comprises items such as ceiling track hoists, stair climbers, ramps, etc. The joint funded equipment is supplied when there is a clear health element and is mostly beds for children and specialist seating for adults and children
49. The Telecare scheme supplies customers with alarm and response equipment to keep them safe in their own homes and avoid the need for formal care. Approximately £169k of the spend incurred in 2024/25 is on switching existing customers from analogue to digital equipment in time for the national digital switchover.

## **Housing Services**

50. The Housing Delivery team have made significant progress with all capital projects throughout the year 2024-25. The Willow House project has commenced and is making good progress through the design work of both new homes and a wider South Walmgate Improvement Plan. The designs of the new homes are now progressed to RIBA 2 with a target of submitting a planning application for 37 new homes in summer 2025. Willow House has also benefitted from receipt of £1,120k of Brownfield Grant Funding from the Combined Mayoral Authority to support the project and assist with unlocking the site by addressing abnormal costs such as archaeology and demolition. This funding is now added into the programme.
51. Design work has also commenced on Lowfield Plot A for supported housing for adults with learning disabilities and/or autism following the Executive decision to progress the site for this use in September 2024. This site has received £392k of Brownfield Grant from the Mayoral Combined Authority and a multidisciplinary team has been appointed to progress towards submission of a planning application later this year. Working jointly with Adult Social Care, engagement work is beginning over summer with a varied range of stakeholders to shape the new development.
52. The works to complete the wider road surfacing at Lowfield Green remains ongoing. This is led by Wates Construction Ltd as part of their original scope of works and does not incur additional cost for the Council. The work to correct drainage defects has been delayed due to wider issues with the drainage network and access to deep drainage being challenging over the winter months, however remediation works are now progressing well and expected to be complete by July 2025. Works to upgrade the Dijon Avenue entrance to the site will follow on from this. The budget has overspent by £167k as a result of Yorkshire Water producing a final account for s185 diversion works which concluded in 2021 and therefore was unexpected and unplanned for. Following legal advice, it was determined the balance must be settled which resulted in the overspend. A full project closedown report will be submitted once the final homes are sold. To date there are 3 properties which are yet to be purchased and these final homes are expected to complete over Summer 2025.

53. All 34 new homes at Duncombe Barracks are expected to complete throughout Summer 2025. Progress over the year has been steady and an underspend of £937k has been recorded as a result of contractor delay. This will slip into 2025/26. The completion of the Council's first net zero carbon, fully certified Passivhaus development is a great achievement and will see 60% of the homes delivered as affordable housing.
54. Burnholme, the second Passivhaus certified development, will complete slightly later in the year with handovers across autumn and winter. This is a larger site comprising of 78 homes, 60% of which will be affordable. As with Duncombe, the contractor has experienced some delay in the period which has resulted in an end of year underspend of £777k which slips into 2025/26.
55. Bell Farm refurbishment and retrofit project commenced onsite in autumn 2024 and is now progressing well. There have been significant delays incurred as a result of unexpected structural and drainage issues that were not known or planned for despite extensive surveys being carried out prior to starting onsite. This has delayed the overall programme completion date from September 2025 to Spring 2026 with handovers of the first blocks commencing over winter. This additional time plus increased work to rectify the structural issues with internal loadbearing walls and upgrading and diverting drainage has led to a projected overspend of £1.2m. Now that strip out works to all blocks are complete costs and programme should not continue to see unexpected change. Work is ongoing to identify the most suitable approach to fund the overspend with a contribution from Major Repairs Reserve and using capital receipts. It is proposed that the budget will be updated as part of the Monitor 1 report.
56. Glen Lodge is progressing well and expected to complete in August 2025. There has been a slight delay to completion which has resulted in an in-year underspend of £430k. An active working group is in place to create a plan for reoccupying the building and resourcing the care to meet the needs of new residents over summer. The project received £125k of additional funding from the Heat Network Efficiency Scheme (HNES) to prepare the heating infrastructure for Air Source Heat Pumps at a future date. The budget will be increased to reflect this additional grant funding.
57. Ordnance Lane has been redesigned to meet the requirement to deliver 100% affordable housing. The updated design increases the

density to 101 new homes and planning approval was achieved for this updated layout in August 2024. The scheme has been designed to RIBA 4 and the tender is underway for a Principal Contractor with tender returns due back in May 2025. Depending on the response from the market, it is hoped that a main works contract will be entered into by Autumn 2025 with a start on site shortly afterwards. Ordnance Lane is a site with a high level of site abnormalities and therefore additional grant has been awarded from the Mayoral Combined Authority to a value of £2,020k to unlock this complex site.

58. To date, Ordnance Lane has been awarded £2.4m of OPE Brownfield Grant Funding which has been used to significantly derisk the site. An enabling contract has been undertaken to clear the site of all existing structures, remove contamination and strip out the 'Married Quarters' retained buildings. The enabling works contract concluded in December 2024. The final account is yet to be concluded but it is anticipated that works will be within the allocated budget.
59. The Housing Delivery programme has concluded two grant funded schemes which delivered shared ownership in the city; Homes England's Second Hand Shared Ownership and YNY Devolution funded Second Hand Shared Ownership with retrofit. Combined these two schemes have delivered 40 new affordable homes to residents who are unable to access home ownership on the open market. The 25 homes funded to provide additional retrofit measures to increase EPC ratings from D or below to C and above have saved in the region of 36 tonnes of CO2 emissions.

#### Major Repairs

60. There was spend of £8,975k on Major repairs during the year and the following works were delivered:
  - New kitchens, bathroom and rewires to 53 tenanted properties with a further 27 one off kitchens and 16 one off bathrooms
  - Damp remediation works to 21 tenanted properties
  - 75 major voids completed with home improvements and some damp works
  - 31 properties received new roofs.
  - 98 properties received new energy efficient 'A rated' windows
  - 454 properties received a new external door, which includes 93 fire doors
  - 4 communal door upgrades and preparing for upgrade as 2G being turned off 2025



- 35 areas had fire remediation works following fire assessments
- 719 flats/communal areas/blocks received external painting works
- Works commenced on the social housing decarbonisation fund with works to 42 properties commencing but these did not complete in full before the end of the year.
- Stock Condition Surveys commenced in January 2024, with 86% surveys completed and results shared December 2024. Future works can now be programmed according to verified data.

61. There was an underspend of £1.3m which will slip into 2025/26 to continue with issues identified through the stock condition survey.

#### Housing Environmental Improvement Programme (HEIP)

62. In 2024/25 Spending from the HEIP budget c(£100k) was focussed on investment in HRA communal areas in the Holgate ward. Following a number of site visits in the ward, a number of Health and Safety and Wellbeing issues were identified. Work has been carried out to resurface shared areas and provide additional fixtures, benches, drying facilities and planting areas.
63. Following consultation with customers about their views and use of communal areas, the service will be undertaking regular local area walkabouts with customers to identify concerns and opportunities to improve the shared facilities. This budget will be refocussed to deliver these customer led improvements, promote wellbeing and address any Health and Safety risks.
64. It is proposed that £75k of the underspend is used in 2025/26 to fund an HRA contribution towards the Neighbourhood Caretaker initiative and the balance of £157k leaves a HEIP budget of £232k.

#### HRA Retrofit

65. Significant progress was made during 2024/25 to deliver the Social Housing Wave 2 retrofit programme for council homes. Works began for over 50 properties to carry out External Wall Insulation to uninsulated wall sections -and for other upgrades where required such as top-up loft insulation.

66. It was unfortunate that the principal contractor for Phase 1 works entered administration after works had already begun on site. This created additional PAS 2035 lodgement and compliance expectations, complicating the establishment of a new supply chain for Phase 1. By the end of the year an alternative supply chain was in place and back on site to achieve completion. Accordingly, the majority of the works for over 100 properties across Phase 1 and 2 had taken place by the end of 2024/25 with completions and handover imminent for these properties.
67. A further £488k SHDF2 grant was claimed during 2024/25, with the result that the full programme grant of £1,033k had been claimed by the end of the year. The total SHDF2 planned spend includes around 50% co-funding from the HRA and the remainder will be spent during 2025/26. As SHDF2 spending is accounted for on a “cost incurred” basis for funding purposes, a total of £765k eligible incurred cost was reported through the SHDF2 year end reporting requirements.
68. The 100% York and North Yorkshire Combined Authority funded heat pump and Solar Photovoltaic upgrades to 61 properties across Alex Lyon House and Honeysuckle House achieved final design and procurement stages. Due to the complexity of the buildings identified once the design contract carried out specialist surveys and M&E infrastructure planning, a revised delivery strategy was determined to be necessary with a switch to individual heat pumps for each flat. This caused some delay with the result that a revised timetable was agreed with the funder, with the bulk of spending being planned during the first half of 2025/26 once works begin on site

#### Healthy and Sustainable Homes

69. Spending on Disabled Facilities Grants totalled £2,118k, funded from Government Grant and Council Prudential Borrowing and was in line with budget. The Healthy and Sustainable Homes service carried out major adaptations to 318 homes, involving the provision of 382 measures to properties in York in the Private Sector housing via the Disabled Facility Grant. The measures are provided to help people to continue to live independently and safely in their homes or to return to their homes following hospital admission.
70. Major adaptation measures provided included 214 level access showers, 35 ramps, 33 stair lifts, 13 level access doors, 9 new additional toilet facilities, 7 automatic door openers, door widening,

paving, safety works etc. Minor adaptations measure provided included 1,567 grab rail 293 banister rails, 209 steps or half steps, 169 wall to floor rails, 128 mop stick rails, 90 floor to floor rails, 60 newel rails, 40 level taps, etc.

71. Spending on Council Housing adaptations was £500k compared to an adjusted budget of £901k in the last financial year, with funding being provided through the HRA, with the underspend arising from a delay in the delivery of works via new procured contractors, with works being delayed from May 2024 to October 2024. As a result, there has been an increase in the list of those waiting to receive council house adaptations, with around 90 people waiting for works at the end of the financial year with an estimated value of £440k. To manage the waiting list, adaptations have been prioritised based on assessed need by an occupational therapist, with higher priority cases being dealt with first, leaving only lower priority cases to be dealt with in the next financial year.
72. During the year, a total of 58 properties received major adaptations works, with 83 measures being provided. This included 20 stairlifts, 13 level access showers, 10 ramps, and other measures such as door widening, bathroom and kitchen alterations, hard standing and dropped kerbs etc. In addition 256 council homes received 484 minor adaptation measures, including 228 grab rails, 46 banister rails, 36 steps or half steps, 30 wall to floor rails, 26 lever taps, 25 window locks etc.
73. Overall demand for adaptation works to properties to help people stay independent is increasing with demand for the service rising from an increasing elderly population and increasing costs for works associated with adaptations due to inflation. The budget for 2025/26 should benefit from an additional £200k from major repairs plus the underspend from 2024/25 to carry forward.
74. The Retrofit One Stop Shop (ROSSY) project is funded by Innovate UK, with funding due to come to an end in November 2025. ROSSY is a council led project supported by 7 partners, these are: BrightSparks Agency, University of York, York Community Energy, Energy Systems Catapult, Wrapt Homes, York and North Yorkshire Combined Authority, and Abundance Finance. The partnership has been created with the aim of resourcing and creating an end-to-end, home energy-efficiency retrofit online platform that will take York residents through the entire retrofit journey from initial enquiry through to the delivery of works.

75. Progress to date has seen the launch of the digital platform Yor Energy ([www.yorenergy.co.uk](http://www.yorenergy.co.uk)) in October 2024. In addition to the platform, two CYC properties are in the process of being upgraded through a deep retrofit as 'Demonstrator Homes' for potential customers to visit or view before being re-used as council homes with significantly reduced fuel bills and improved thermal performance for future residents.
76. Delivery of the Home Upgrade Grant 2 is being undertaken by the Healthy and Sustainable Homes Service and our delivery partner Clear Climate, with the aim to undertake a number of different energy efficiency improvement measures in up to 60 off gas properties in York. The scheme is due to fully complete by the end of May 2025, with the following measures having been undertaken to 44 homes to date with 173 measures installed including 31 digital smart controls, 30 air source heat pumps, 26 loft insulations, 21 solar photo voltaic panels, 16 internal wall insulation , 14 high retention storage heaters in houses, and 10 high heat retention storage heaters in flats. All the funding for the works is provided for the scheme by the Department of Energy Security Net Zero (DENSZ).
77. The Warm Homes: Local Grant is a government-funded programme, delivered by Local Authorities, to improve energy efficiency for low-income households in the private sector, with grants being provided to eligible households to pay for energy performance upgrades and low carbon heating measures. It is a three-year scheme totalling £2,037.7k, running until March 2028.
78. The Warm Homes : Social Housing Wave 3 grant was also successful with funding of £1,379.9k awarded. This will support the retrofit work already committed for council stock.

## **Communities**

### **Future Libraries Investment Programme**

79. The three library projects have been combined and are reported within a single FLIP (Future Libraries Investment Programme), under the corporate project management structure.
80. Clifton and Haxby & Wigginton Libraries are now complete and open. The Acomb library enhancement project is progressing well with the vision and scope all in line with the results of the public consultation that took place in early 2024 and the results remain at the

heart of the enhancement project. The successful Library Improvement Fund grant from Arts Council England of £250k is also included. In terms of timeline, the project team will report to Executive Member Decision Session to sign off the proposals for works in start autumn/winter 2025, after the busy summer period.

#### Mansion House

81. The Mansion House Repairs scheme budget for 24/25 was £1,281k (included £8k Project Support Allocation). £900k was slipped at Monitor 3 and an additional CRAM bid of £450k approved for 25/26.
82. William Birch was appointed to the construction tender in January 2025 and works started internally in February 2025 with external scaffolding starting in March. Works are programmed to continue externally until the end of July and internally until November 2025, a further £75k slippage is request at outturn.
83. At present works are to budget and to programme, however, there are several time risks which may affect the reopening of the building to the public or timed completion of the works, these are being managed, however, there is no time contingency in the programme.

#### Energise Roof Works

84. Phase 1 of the works on Energise roof are complete which has eliminated 90% of the problems. Greenwich Leisure Limited have commissioned a further roof inspection and report, which the Council are waiting to understand the finding and to agree a next phase of works within the budget remaining. This work has been delayed in 2024-25 so funds have been rolled over to address any final works in 2025-26.

#### Crematorium Waiting Room

The additional £375k CRAM bid was approved, the total amount available to deliver the project is now £596k. Over the next few months, the scope and costs of the work will be defined. The aim is to complete the works before autumn 2026.

#### Sport and Leisure

85. Spend on sports facilities across the city including pavilion improvements at Rowntree Park Tennis club, changing rooms and pitch improvements at New Earswick Sports & Social Club and a contribution to Poppleton Community Trust towards the installation of

a new Padel Court and Petanque Rink. This scheme is fully funded by S106 developer's contributions

Westfield Multi Use Games Area Provision

86. Work is ongoing to confirm the most appropriate site for the MUGA. The two present options are next to the play area on Chesney's Field or next to the Electrical substation off Foxwood Lane, adjacent to York Acorn ARLFC pitches. Budget slippage of £192k to 25/26.

**Transport, Highways & Environment**

87. Capital expenditure on various schemes within Transport, Highways & Environment totalled £26.337m in 2024/25.

Major Schemes (York Outer Ring Road and Station Gateway)

88. The Monitor 3 report (Executive January 2025) reported significant cost pressures across the two schemes and agreed some cost adjustments across the schemes. These have been included in the numbers shown across the annex.
89. Further details of these pressures are being reported in a separate report elsewhere on the Agenda with proposals to reprioritise these budgets going forward.
90. Any changes agreed in the separate report will be incorporated into future capital monitoring reports.

**Transport Schemes**

City Centre Sustainable Corridor – Bus Priority

91. BSIP funding was secured to improve bus journey times and improve reliability of services in the city centre. Feasibility and initial designs were progressed during 24/25. Revised drawings were provided to incorporate a flood defence barrier on Tower Street.
92. Project approved by the executive member to proceed to public consultation in June 2025 with current milestone planning towards a spring 2026 delivery

P & R Interchange Upgrades

93. BSIP 1 funding was secured to provide a new ticket office and public waiting area/ amenities of Grimston Bar P & R and refurbishment of the remaining 4 sites:

- Askham Bar
- Rawcliffe Bar
- Poppleton Bar
- Monks Cross

94. Designs finalized for consultation in 24/25 with consultation to be conducted in May 2025 with a view to executive decision in August 25. Implementation is intended to be phase from September through to March (25/26).

#### BSIP Bus Stop Upgrades

95. 15 additional locations are planned in for improvements between May and July 2025. The improvements are mostly raised kerbs, but also include enlarged waiting areas, road repairs and replacement shelters.

#### BSIP Real-Time Screens

96. Work on the installation of new real-time information screens has continued in 24/25 with 66 screens installed over the summer, and work on the programme of bus stop improvements is ongoing.
97. Second tranche of 50 additional battery screens ready for installation, scheduled to take place throughout May. Replacement screens for station frontage scheme ordered for installation first quarter 2025 and screens to be installed in first four new shelters in early May as soon as NPG have provided a power connection.

#### Small Scale Bus Priority - Strensall Bus Terminus Improvements

98. Feasibility and detailed design completed in 24/25 (pending a decision on the shelter from councillors), with implementation works planned between 16th June – 6th July 2025.

#### TSAR

99. The proposed programme of TSAR schemes has been deferred to allow the schemes to be reviewed to ensure that they meet the requirements of the new Local Transport Strategy and the emerging Movement and Place Plan, including a review of scope and prioritisation of sites. A revised programme will be included in the 2025/26 Transport Capital Programme.
100. To align to this incentive, feasibility and design have been conducted for 5 sites in 2024/2025 with a view to implementation in 25/26 for which Capital Programmed funding will be allocated:

- Huntington Rd/ Haleys Terrace
- Holgate Rd/Wilton Rise
- Foss Bank
- Heworth Green/Dodsworth Avenue.
- Copmanthorpe Link Rd

101. In addition, updates to traffic signal detectors and updates to 7 sites with new above ground detection conducted in 24/25. In addition some controller replacements were initiated in 24/25 with the remainder of the 5 sites scheduled for May/June 2025.

#### Signing & Lining Speed Limit Amendments

102. A 20mph village wide restriction was implemented in Bishopthorpe under an experimental Traffic Regulation Order. This is still in place and under ongoing evaluation with a view to agreeing as a permanent measure.

103. In addition speed limit restrictions were also implemented in the following locations:

- B122 Naburn Lane (30 mph limit).
- A1079 Dunnington (40mph limit).
- Askham Bryan Lane (30 mph limit).
- Revival Estate (20mph limit).
- Towthorpe (30 mph limit).
- Sim Balk Lane (40 mph).
- North Field Lane (30mph limit).
- Askham Fields Lane (30 & 40mph limits).
- Wetherby Rd Rufforth (20 mph limit).
- Haxby Rd/Clarence Gardens (20 mph limit)

104. The following locations progressed through to detailed design in 24/25 with intended implementation in 25/26 funded from the Capital Programme LTP funds.

- North Lane Huntington
- Wheldrake Lane Elvington (30 mph limit extension)
- A59 Poppleton (40 mph limit extension)



ANPR Bus Lane Enforcement

105. The programme of works to replace Automatic Number Plate Recognition cameras which were outdated and approaching end of life was completed in 24/25 at Coppergate Low Poppleton Lane

Access Barrier Review

106. The Council has agreed to participate in a research project being undertaken by academics from the University of Westminster to monitor the impact on path users and nearby residents of removal or redesign of barriers to make them compliant with guidance. This is likely to be a 5year funded scheme addressing c800 sites across the city.
107. Work was undertaken in 24/25 to identify and categorise the level of work required across the range of existing barriers. An initial tranche of 20 sites were highlighted which were felt to represent the majority of variances in Barriers in order that a repeatable delivery model could be determined to enable speedier implementation of subsequent tranches.
108. The first part of tranche one was implemented in April 2025 with the remainder to be actioned in coming weeks. Plans are underway to scale up delivery during 2025/2026 based on lessons learned from this initial tranche.

City Centre Dropped Kerbs

109. 7 sets of dropped crossings were installed throughout Low Petergate in summer/autumn 24/25.
110. Dropped crossing at Aldwark completed detailed design in 24/25 and will be implemented as 3 sets of crossings in the locale in Summer of 2025

PROW Upgrades

111. Replacement of the footbridge on the Rufforth-Knapton Public Right of Way (following installation of a temporary bridge earlier this year) was delayed in 24/25 due to ongoing challenges with procurement of an interested contractor. Funding has been re-profiled to an expected 25/26 implementation of a permanent bridge.

Millennium Bridge Approaches

112. Work to raise the level of the shared-use paths on the approaches to Millennium Bridge was completed in the summer of 2024/2025 and a

programme of improvements to other sections of Route 65 in York is being developed for implementation in 2025/26. As a result, the funding has been reprofiled to reflect the revised timescales for the second phase of the project.

#### Solar System Cycle Route Phase 1:

113. Improvements to the underpass and approach ramps on the solar system cycle route between the extent from Sim Balk Lane and the P&R at Askham Bar was successfully completed in 24/25.

#### Safety Schemes

114. A number of safety schemes completed in 2024/2025 as follows:
- Bradley Lane Rufforth LSS was implemented in September 2024, in response to concerns following a fatal incident at this locale.
  - Foss Islands/ Navigation Road LSS main scheme was implemented May/June 2024 with minor revisions undertaken in February 2025, in response to road safety concerns involving conflicts between cyclists/pedestrians/vehicles.
  - Heworth Green/ Eboracum Way interim solution implemented in October 2024 to support road safety concerns between cyclists & vehicles, until a long term, wider solution is implemented as part of the wider ongoing TSAR programme.
  - Heslington Rd implemented December 2024 to address high kerb hazards at a bus stop location.
  - Black Dike Lane completed detailed design in 24/25 and has been issued for implementation in Summer 2025

#### Active Travel Programme

115. Following the development of the new Local Transport Strategy and the Movement and Place Plan, the Active Travel Programme is under review with the majority of the schemes in the programme have been deferred pending the outcome of this review. Officers are working with members of the MCA to understand the proposed allocation of mayoral funding that can be spent on Active Travel for 25/26. Once discussions concluded this will then inform the programme of work for Active Travel for this year.
116. However work on the Riverside Path scheme has continued, with a public consultation event held in November, feasibility and preliminary design of an affordable solution was agreed in March 2024 with plans to progress with detailed designs in 25/26.

### HVM

117. Work to install the Hostile Vehicle Mitigation measures at key locations around the city centre begin in April 2023 across 11 sites. All infrastructure now installed and operational, with the final site at Parliament Street completed in December 2024.
118. As previously reported, the cost of the scheme continued to attract increased costs due to changes in the in the method of working to mitigate access issues during the works, and difficult ground conditions due to utility services and archaeological requirements. The additional costs have been funded from within the Transport & Highways capital budgets.
119. In addition, as of the start of 2024, access for blue badge holders at Goodramgate and Blake Street was granted, as a result, operational costs have increased in order to securely manage this access (site entrances are currently manually staffed)
120. The scheme is likely to attract additional costs throughout 25/26 with regards to ongoing discussions for turn back proposals at Blake Street, and whilst transition of the project to an agreed operational model concludes. Provisions will be made within the 25/26 Capital Programme to accommodate this.

### EV Schemes

121. The main focus of the work in 2024/25 has been securing funding and conducting feasibility, for the next 3 main EV projects, namely;
  - Union Terrace Hyper Hub
  - Askham Bar Hyper Hub
  - LEVI (On Street)
122. Work continues on the background legal issues with regards to land ownership and overage issues at both HyperHub sites and continues to cause significant delays.
123. Work continues in parallel with AccessAble and Motability on improving the PAS 1899 assessment process.

### ZEBRA Grant

124. The final payment to First York from the government's Zero Emission Bus Regional Areas (ZEBRA) grant for the conversion of the York bus

fleet to all-electric buses has been made, which has funded the completion of works at the York depot to support the new bus fleet and delivering the one of the first Carbon Neutral Bus Depots in the UK.

#### Highway Schemes (including footways)

125. Total spend across Highway schemes in 2024/25 was £6.457m in 2024/25. This was funded from Government Grant £3.556m and CYC borrowing £2.901m.
126. Twelve Carriageway Repair & Replacement schemes were successfully delivered, with a total newly resurfaced area covering approximately 37,500m<sup>2</sup>.
127. Ten Large Patching Schemes were successfully delivered with a total area covering approximately 20,000m<sup>2</sup>.
128. Four Surface Dressing schemes were successfully delivered with a total area covering approximately 43,500m<sup>2</sup>.
129. Footway repair and replacement schemes have been successfully delivered at the following listed locations:
  - Holroyd Avenue
  - Lamplugh Crescent
  - Wigginton Road
  - Keble Park South
  - St Benedict Road
  - Lendal
  - Footpath Slurry Sealing at various locations

#### Drainage

130. A total of £1.342m was spent in 2024/25 completing drainage improvement projects. More than twenty individual improvement schemes have been completed, which have alleviated localised flooding issues as part of the specific Proactive Investigations & Repair Programme. This programme will continue into 2025/26.
131. Further significant drainage improvement schemes were carried out, at the following listed locations, to proceed the road resurfacing works delivered in 2024/25.
  - Wigginton Road

- Huntington Road
- Field Lane Heslington
- Grimston Bar

132. Urgent repair works to sink holes were further delivered by the drainage team at more than five locations around the city.

#### Structures

133. There was total expenditure of £939k on bridges (including Lendal bridge) through the year.

134. Twenty-five Structural Reviews have been carried out in 2024/25, to comply with the Council's obligations, in relation to The Management of Highways Structures Code of Practise. All new information has been updated on the Council's Structural Asset Management System.

135. In addition to this:

- Principal Inspections have been carried out at Millfield Lane, Holgate Road, Ouse Bridge and Fossway Bridges, including the preparation of repots and recommendations for repairs.
- Structural Assessments of Haxby Bridge and Underpass have been carried out, to determine the load bearing capacity of the existing structures.
- A bridge strengthening scheme has been delivered at Bishopthorpe Bridge, which has involved the design, fabrication and installation of a new corrugated steel structure, below the existing bridge deck. This will enable the bridge to carry the required 40 tonnes of loading, which was previously limited to 18 tonnes, under a temporary Traffic Regulation Order.
- Tender documents are being prepared for painting, repairs, waterproofing and resurfacing works required at Lendal Bridge.

#### Street Lighting

136. There was total expenditure of £500k on replacing street lighting columns. 347 of the aged, expired Street Lighting steel column assets, of varying heights have been replaced with new assets. This included conversion of lighting heads to LED if not already converted. These locations were city wide.

137. 933 additional Street Lighting Heads, mainly in residential areas, were converted to LED with Net Zero Funding (£331k), to reduce energy costs and the carbon footprint.

#### City Walls Maintenance

138. Significant conservation works were carried out on the Icehouse, between towers 23 and 24.
139. Substantial maintenance works were carried out at Fishergate Bar, alongside the annual programme of basic maintenance, pointing stone replacement and walkway flagstone relaying.
140. The team further carried out the first year of quarterly monitoring, of over 150 locations, and have identified several sections of progressive movement that will require more invasive projects to stabilise in future years.

#### Castle Mills

141. An essential scheme to replace the existing timber lock gates at Castle Mills, has commenced, with the off-site manufacture of the gate components and clearance of silt from behind the downstream gates, by a team of specialist underwater divers. The gates were last replaced in 1986, and being nearly forty years old, must be replaced as a matter of urgency, to comply with the Council's duty as the Navigation Authority for the River Foss. It is proposed to reallocate £300k from the 2024/25 Highway Schemes budget to the lock gate replacement scheme, which is currently forecast at £1.4m.

#### Replacement Fleet Programme

142. The final 24/25 spend for Vehicle Replacement Programme was £2,078m. 18 vehicles and 55 pieces of plant equipment has been replaced across the different departments throughout the council. Nearly £5m New Purchase Orders has been raised in 2024/25. Due to lengthy lead times vehicles are expected to be delivered in 2025/26 & 2026/27.

#### City Development

143. **Castle Gateway** – In November 2023 Executive agreed the way forward to deliver some of the masterplan proposals, and work has now commenced to revise designs for the Castle / Eye of York and assess the potential for the delivery of Affordable Housing at Castle Mills. The strategic importance of St George's Field as a parking location was acknowledged and proposals for improving parking provision there, with coach drop off facilities, are being

progressed. The proposals will be included in the business case, which will be reported to the Executive for approval in September 2025.

144. Public and stakeholder engagement has been undertaken on the stage 2 designs for the Castle and Eye of York scheme. This feedback has been used to inform the next stage of design development which will be sent to external consultants for the costs to be established. The cost plan for the scheme is nearing completion and the next stage is to review with the project team. The outcome of this and the review and other parking facilities in the vicinity will also form part the report mentioned above.
145. The phasing spend for Castle Gateway Infrastructure (Castle Mills Bridge and cycle route) has been pushed back a year to 2026/27. This is linked to the wider review of WYCA spend on capital projects.

#### York Central

146. General progress on the project remains positive. The planning application for the Government Property Agency building was approved by Planning Committee in July 2024. Officers are reviewing the next steps for the scheme.
147. The delivery of the main York Central highway infrastructure by Homes England is progressing with the Phase 1 delivering the alternative route around the National Railway Museum expected to be complete by summer 25, allowing the stopping up of Leeman Rd to be certified.
148. Road construction has progressed to enable Leeman Road to be stopped up. This includes construction of the new spine road as well as the main cycle/pedestrian route and improvements to Station Rise.
149. Phase 2 of the scheme to connect the new spine road through to Water End is expected to be complete in 2027. Ground improvement works and foundations have progressed for the embankments and bridges

#### Climate Change

150. The Climate Change programme had a budget of £1,727k for 2024/25, including £227k slippage from last year. The budget has supported £95k towards LED improvements at West Offices and Hazel Court which were completed in March 2025. During 24/25 White Rose

Forrest grants were also received from Kirklees Council (£216k plus £6k matched funding) which has supported tree planting.

151. At monitor three, £1.5m was slipped to 2025/26 as there will be further calls on the budget potentially to fund solar panels at Yearsley swimming pool and Acomb Library (£120k), as well as a potential requirement of £400k for additional car parking at the Community Woodland (a review of the current parking situation is being conducted). There are also potential commitments for tree provision as part of the York Outer Ring Road Scheme.
152. Officers will review opportunities to use funding to support the above as well as for potential match funding towards Public Sector Decarbonisation Scheme applications and Carbon Negative Challenge Fund projects, including improvements works at Hazel Court Eco Depot, Moor Lane Youth Centre and Clifton Children's Centre. It is requested that a further £236k is slipped to 25/26.
153. Key achievements include:
  - Completion of Net Zero Fund projects, including:
    - Techno-economic feasibility study for renewable generation at Monks Cross, Grimston Bar Park & Ride and University of York.
    - Installation of LED improvements at Hazel court and West Offices, saving 37tCO<sub>2</sub>e/yr.
    - Installation of LED replacement of 985 streetlights completed, with additional funding allocated to replace an extra 400 lights by end of June 2025.
    - Contract awarded and planning permission granted for replacement heating system at Honeysuckle House and Alex Lyon House.
    - Strategic Outline Case completed for Harewood Whin Green Energy Park.
  - Completion of the York pilot for the Local Investment in Natural Capital (LINC) project, identifying sites in York for ecosystem service improvements and potential external sources of finance.
  - Development of asset prospectus for the Net Zero Accelerator (City Leap) project with North Yorkshire Council and the Combined Authority.
  - Completion of the phase 2 Green Streets programme, planting over 5,000 trees in public open space and highways.



- Solar for Schools installation expanded with 8 York schools now having panels fitted.
- Two new micro-woodlands created in York.
- Applications submitted to Carbon Negative Challenge Fund

### **Property Services**

154. Works on the LED replacement scheme at West Offices and Hazel Court have been completed bar some final commissioning. Projects undertaken from the Asset Maintenance budget this year include:
- Swinegate's heating system, following design work, works have now been completed on the mechanical systems with final upgrade connections to be complete by the end of May.
  - Various works to CYC schools have been completed including significant m&e works at Ralph Butterfield and Westfield and building works at Huntington and Applefields.
  - Works scheduled to windows and external works at Shambles are well under way.
  - Works were completed at the new Clifton Explore library.
  - Drainage works have been completed at a commercial property on Castlegate.
  - A refurbishment programme at Silver St Market Office was completed to replace all the flooring within the work and recreational spaces which also included full redecoration throughout.
155. It is proposed that £172k of the remaining budget be slipped to 2025/26 to complete the remaining works.
156. Prelim works for locating a new data centre cooling facility at West Offices are underway and implementation works are anticipated for this financial year, requiring £355k budget to be slipped to 25/26.
157. Quotes for works for improvements to welfare facilities at Hazel Court are being sought with works to follow.
158. Refreshment of asbestos surveys is underway and call on any works required due to be assessed this financial year from the existing budgets, £222k slippage to 2025/26.

159. Union Terrace and Robinson Court's management was brought in house and the current budget will be utilised in liaison with Housing colleagues. The remaining budget of £141k is proposed to be slipped to 2025/26

### **Corporate Services – IT**

160. The ICT capital programme had a budget of £2.923m for 2024/25, The ICT development plan capital expenditure totalled £1.988m, £939k slipped to 2025/26.
161. The most significant financial investment in year was attributable to the renewal of our Microsoft and Citrix licencing across the CYC estate and the contract renewal for iTrent, for which the move from on premise to Cloud will be completed mid-2025.
162. The work of the ICT service supports and enables the council, partners and the city on many different levels. Examples this year include:

### **Digital Council**

163. A number of systems have been implemented, replaced, upgraded or continued to be further developed this year, these include:
- Completion of the upgrade of EDRMS and subsequent rollout in May 2024
  - Successful launch of a new CRM solution via the Garden Waste Project Phase 1 in July 2024 and Phase 2 in January 2025
  - Parking Taranto upgrade to version 2.14
  - Successful move of Civica Technology Forge from on premise to Cloud
  - Ongoing work to move iTrent from on premise to Cloud
  - Progression of the Digital switchover work including cessation of analogue telephone lines
  - Upgrade of Child View to version 5.6
  - Upgrade of Open Housing to version 18
  - The replacement of Browse Aloud with ReciteMe as the text to speak translation offer across 7 corporate websites
  - Completion of Identification and deployment of applications previously only available in Citrix over to laptops and desktops

Transfer of the Revenues and Benefits system onto a Windows operating system ensuring full compatibility with all of our on premise systems

#### Digital Staff

164. The majority of our work under this theme has been our involvement on the Working as One programme where ICT have provided significant support and resource commitment into the establishment and progression of this fast paced and evolving council priority. Our involvement has included:
- Full implementation of Microsoft Teams and Micollab enabling the successful decommissioning of Skype
  - Successfully replaced over 200 HP Elitebook model laptops with the current Lenovo E14/E16 devices in preparation for the upgrade to Windows 11
  - Continued replacement of thin terminals with docking stations across all CYC sites increasing flexibility for hybrid workers
  - Ongoing commitment to the testing and upgrade to Windows 11 which is to be completed by October 2025

#### Digital City

165. Some of the key activities during the year included:
- Ongoing expansion of Full Fibre in some of York's more rural locations, we have worked with Fusion Fibre Group delivering Full Fibre services to the villages of Elvington, Wheldrake and Stockton on the Forest
  - Digital York is actively working to promote digital inclusion across the city, ensuring all residents have access to essential digital services and resources. Through various initiatives and partnerships with local organisations, efforts are underway to bridge the digital divide and empower all residents with the necessary digital skills and tools. Initiatives include CoderDojo, a monthly coding club for 7–17-year-olds and working with Joseph Rowntree Housing Trust to deliver refurbished digital devices to its residents.
  - Working with Faster Broadband to continue its Full Fibre rollout, bringing high-speed connectivity to 8,000 homes and businesses within York's city walls, with fibre connectivity now live in and around the Micklegate area along with Gillygate, High Petergate, Bootham, Marygate, Lord Mayor's Walk, Claremont Terrace, and

surrounding streets. Phases 3 and 4 is focussed on Fossgate, Walmgate and surrounding areas.

### **Funding the 2024/25 Capital Programme**

166. The 2024/25 capital programme of £74.019m has been funded from £30.293m external funding and £43.726m of internal funding. The internal funding includes resources such as revenue contributions, Supported Capital Expenditure, capital receipts and reserves.
167. The overall funding position continues to be closely monitored to ensure the overall capital programme remains affordable and is sustainable over the 5 year approved duration.

### **Update on the 2025/26 – 2029/30 Capital Programme**

168. The restated capital programme for 2025/26 to 2029/30 split by portfolio is shown in table 3. The individual scheme level profiles can be seen in Annex 1.

<b>Gross Capital Programme</b>	<b>2025/26</b>	<b>2026/27</b>	<b>2027/28</b>	<b>2028/29</b>	<b>2029/30</b>	<b>Total</b>
	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>
Children's services	18.854	4.131	-	-	-	<b>22.985</b>
Adult Social Care	1.039	0.728	0.752	0.776	0.800	<b>4.095</b>
Housing	49.270	18.976	19.781	15.150	15.050	<b>118.227</b>
Communities	5.805	-	-	-	-	<b>5.805</b>
Transport, Highways & Environment	70.129	49.636	41.516	27.708	21.927	<b>210.916</b>
City Development	27.594	10.582	2.800	1.920	-	<b>42.896</b>
Property Services	2.197	0.675	0.275	0.275	0.275	<b>3.697</b>
ICT	4.109	2.820	2.820	2.820	2.820	<b>15.389</b>
Corporate Services	1.746	0.369	0.394	0.200	0.200	<b>2.909</b>
<b>Revised Programme</b>	<b>180.743</b>	<b>87.917</b>	<b>68.338</b>	<b>48.849</b>	<b>41.072</b>	<b>426.919</b>

**Table 3 – Restated Capital Programme 2025/26 to 2029/30**

169. Table 4 shows the projected call on Council resources going forward.

	<b>2025/26</b>	<b>2026/27</b>	<b>2027/28</b>	<b>2028/29</b>	<b>2029/30</b>	<b>Total</b>
	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>	<b>£m</b>
<b>Gross Capital Programme</b>	<b>180.743</b>	<b>87.917</b>	<b>68.338</b>	<b>48.849</b>	<b>41.072</b>	<b>426.919</b>
Funded by:						

External Funding	69.577	43.240	28.566	9.986	7.195	<b>158.564</b>
Council Controlled Resources	111.166	44.677	39.772	38.863	33.877	<b>268.355</b>
<b>Total Funding</b>	<b>180.743</b>	<b>87.917</b>	<b>68.338</b>	<b>48.849</b>	<b>41.072</b>	<b>426.919</b>

**Table 4 – 2025/26 –2029/30 Capital Programme Financing**

170. The Council controlled figure is comprised of a number of resources that the Council has ultimate control over. These include Right to Buy receipts, revenue contributions, supported (government awarded) borrowing, prudential (Council funded) borrowing, reserves (including Venture Fund) and capital receipts.
171. In financing the overall capital programme, the Chief Finance Officer will use the optimum mix of funding sources available to achieve the best financial position for the Council. Therefore, an option for any new capital receipts would be to use these to replace assumed borrowing, thereby reducing the Councils' borrowing levels and associated revenue costs.

## **Organisational Impact and Implications**

172. The report has the following implications:
- **Financial** - are contained throughout the main body of the report. Given the forecast financial position of the Council and the need to reduce expenditure, there will be a review of the capital programme. This review will need to identify ways in which capital expenditure can also be reduced.
  - **Human Resources (HR)** - There are no direct HR implications as a result of this report. Any variations to the capital programme that have staffing implications will follow appropriate consultation and HR policies and procedures.
  - **Legal** - Whilst this report itself does not have any legal implications, the schemes within the capital programme themselves will be in receipt of legal advice where necessary
  - **Procurement** – Whilst this report itself does not have any procurement implications, schemes within the capital programme are all procured in accordance with the procurement legislation.
  - **Health and Wellbeing**, reductions in spend in some areas could impact on the health and wellbeing of both our staff and residents. The impact of any reductions in the capital programme will be

carefully monitored so that implications can be considered and mitigated where possible.

- ***Environment and Climate action***, as this report is mainly for information to update on the progress of delivery of schemes within the programme, there are no direct environment and climate action implications as a result of this report.
- ***Affordability***, Affordability, as this report is mainly for information to update on the progress of delivery of schemes within the programme, there are no direct affordability implications as a result of this report. A number of the schemes will contribute to affordable and more efficient homes.
- ***Equalities and Human Rights*** — as this report is mainly for information to update on the progress of delivery of schemes within the programme, there are no direct equalities and human rights implications as a result of this report. All individual schemes will be subject to Impact Assessments in the usual way.
- ***Data Protection and Privacy***, As there is no personal data, special categories of personal data or criminal offence data being processed, there is no requirement to complete a data protection impact assessment (DPIA).
- ***Communications***, the information set out in this report does not have any specific communications implications. The finance and performance monitor report elsewhere on this agenda includes details of the communications activity in relation to the overall council finances.
- ***Economy***, there are no direct implications related to the recommendations.

## Risks and Mitigations

173. There are a number of risks inherent in the delivery of a large scale capital programme. To mitigate against these risks the capital programme is regularly monitored as part of the corporate monitoring process, and the project management framework. This is supplemented by internal and external audit reviews of major projects.

## Wards Impacted

174. All wards are impacted by the issues detailed in the report.

## Contact details

For further information please contact the authors of this Decision Report.

### Authors

<b>Name:</b>	Emma Audrain
<b>Job Title:</b>	Technical Accountant
<b>Service Area:</b>	Financial Services
<b>Report approved:</b>	Yes
<b>Date:</b>	04/07/2025

<b>Name:</b>	Patrick Looker
<b>Job Title:</b>	Assistant Director of Finance
<b>Service Area:</b>	Financial Services

## Background papers

- [Capital Budget Report Executive 25th January 2024](#) and Full Council 22 February 2024
- [Capital Programme Outturn 2023-24](#) – Executive 18 July 2024
- [Capital Programme Monitor 1](#) – Executive 12<sup>th</sup> September 2024
- [Capital Programme Monitor 2](#) – Executive 14<sup>th</sup> November 2024
- [Capital Programme Monitor 3](#) 2024/25 – Executive 21 January 2025
- [Capital Budget 2025/26 to 2029/30](#) - Executive 21 January 2025

## Annexes

- Annex 1 – Capital Programme 2024/25 to 2029/30

This page is intentionally left blank



**Annex 1 - Capital Programme 2024/25 to 2029/30**

	2024/25 £'000	2025/26 £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000	2029/30 £'000	Total £'000
<b>CHILDRENS SERVICES</b>							
DfE Maintenance	1,868	2,559	1,800	0	0	0	6,227
Basic Need	44	2,364	2,125	0	0	0	4,533
Expansion and Improvement of Facilities for Pupils with SEI	0	2,055	0	0	0	0	2,055
St Oswalds Classrooms	105	1,895	0	0	0	0	2,000
SEND - St Paul's Nursery ERP Expansion	150	1,518	0	0	0	0	1,668
SEND - Applefields Extension (Phase 3)	470	1,121	0	0	0	0	1,591
Schools Essential Mechanical & Electrical Work	0	1,581	0	0	0	0	1,581
Hob Moor Oaks Classrooms	285	815	0	0	0	0	1,100
Huntington Science Labs	984	116	0	0	0	0	1,100
Schools Essential Building Work	527	454	0	0	0	0	981
SEND - Specialist SEMH Expansion	0	946	0	0	0	0	946
Mainstream Schools SEND fund	202	573	0	0	0	0	775
SEND - Huntington School ERP	425	337	0	0	0	0	762
Clifton Green Primary - Re-organisation and Security	534	92	0	0	0	0	626
NDS Devolved Capital	206	206	206	0	0	0	618
Danesgate Outdoor Learning Area	168	432	0	0	0	0	600
Children in Care Residential Commissioning Plan	36	556	0	0	0	0	592
Improving School Accessibility	0	420	0	0	0	0	420
Fulford School Expansion 2020 Phase 1 and 2	173	232	0	0	0	0	405
Early Years Expansion Premises Investment	22	312	0	0	0	0	334
Danesgate Extension 2022	27	177	0	0	0	0	204
Family Hubs Capital Investment	167	0	0	0	0	0	167
Early Years Additional Places (Lowfield Green)	104	0	0	0	0	0	104
Healthy Pupils Capital Fund	0	93	0	0	0	0	93
<b>TOTAL GROSS EXPENDITURE</b>	<b>6,497</b>	<b>18,854</b>	<b>4,131</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>29,482</b>
<b>ADULT SOCIAL CARE</b>							
Telecare Equipment and Infrastructure	302	283	291	300	309	318	1,803
Disabled Support Grant	254	277	280	290	300	310	1,711
Major Items of Disability Equipment	157	152	157	162	167	172	967
S106 Sports Development	166	0	0	0	0	0	166
Proof of Concept for robotics & AI within social care	0	161	0	0	0	0	161
CRIS Portal Replacement	0	125	0	0	0	0	125
OPA - the Centre@Burnholme including enabling works	21	41	0	0	0	0	62
OPA-Ashfield Estate Sports Pitches	2	0	0	0	0	0	2
<b>TOTAL GROSS EXPENDITURE</b>	<b>902</b>	<b>1,039</b>	<b>728</b>	<b>752</b>	<b>776</b>	<b>800</b>	<b>4,997</b>
<b>HOUSING (HRA &amp; Gfund)</b>							
Major Repairs & Modernisation of Local Authority Homes	8,975	14,046	11,827	12,043	12,200	12,100	71,191
LA Homes - Burnholme	6,203	8,591	0	0	0	0	14,794
Disabled Facilities Grant (Gfnd)	2,119	2,600	2,565	2,565	2,100	2,100	14,049
Gypsy & Traveller Site Investment (Gfnd)	0	750	1,500	3,000	0	0	5,250
Bell Farm Improvement Works	1,903	2,887	0	0	0	0	4,790
Duncombe Barracks	2,197	2,469	0	0	0	0	4,666
Assistance to Older & Disabled People	500	1,241	650	660	680	680	4,411
Local Authority Homes - Phase 2	0	3,685	0	0	0	0	3,685
Glen Lodge Refurbishmen	2,208	1,012	0	0	0	0	3,220
Shared Ownership Scheme	2,933	60	0	0	0	0	2,993
Local Authority Homes - Project Team	109	1,370	889	0	0	0	2,368
LA Homes - Hospital Fields/Ordnance Lane	1,486	2,642	0	0	0	0	4,128
LA Homes Energy Efficiency Programme	399	1,549	497	483	0	0	2,928
Warm Homes Grant (Gfnd)	0	300	878	860	0	0	2,038
Home Upgrade Grant (Gfnd)	188	1,054	0	0	0	0	1,242
Resettlement Housing	1,180	29	0	0	0	0	1,209
Housing Environmental Improvement Programme	100	327	170	170	170	170	1,107
Alex Lyon House - Renewable Heating Upgrade	54	997	0	0	0	0	1,051
Willow House Housing Development	504	1,521	0	0	0	0	2,025
Honeysuckle House - heat pump communal heating upgra	42	802	0	0	0	0	844
Lowfield Housing	436	132	0	0	0	0	568
Lowfield Plot A specialised housing	13	467	0	0	0	0	480

	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	Total
	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Water Mains Upgrade	0	410	0	0	0	0	410
Union Terrace & Robinson Court	0	325	0	0	0	0	325
James House replacement	94	0	0	0	0	0	94
Chaloner Road Site Enabling Works	24	0	0	0	0	0	24
Tang Hall Library Site Enabling Works (Gfnd)	0	4	0	0	0	0	4
<b>TOTAL GROSS EXPENDITURE</b>	<b>31,667</b>	<b>49,270</b>	<b>18,976</b>	<b>19,781</b>	<b>15,150</b>	<b>15,050</b>	<b>149,894</b>

**COMMUNITIES (INCL CLIMATE CHANGE)**

Future Libraries Investment Programme	2,126	798	0	0	0	0	2,924
Climate Change Schemes incl Northern Forest	118	1,986	0	0	0	0	2,104
Mansion House Urgent Repairs	306	1,425	0	0	0	0	1,731
Leisure Facilities Solar Arrays	0	750	0	0	0	0	750
Crematorium Waiting Room / Refurbishment	0	596	0	0	0	0	596
Castle Museum Repairs	200	0	0	0	0	0	200
Westfield Multi Use Games Area	0	192	0	0	0	0	192
Changing Places (Toilets)	121	0	0	0	0	0	121
Energise Roof	0	58	0	0	0	0	58
Registry office Phase 2 Refurbishment	45	0	0	0	0	0	45
<b>TOTAL GROSS EXPENDITURE</b>	<b>2,916</b>	<b>5,805</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>8,721</b>

**TRANSPORT, HIGHWAYS & ENVIRONMENT**

York Outer Ring Road - Dualling	450	4,841	22,394	19,563	5,603	0	52,851
Highway Schemes	6,457	10,014	9,070	9,070	9,070	9,070	52,751
Replacement Vehicles & Plant	2,078	6,899	3,392	7,323	8,510	8,532	36,734
York Station Gateway	7,392	11,845	1,000	0	0	0	20,237
Integrated Transport	1,376	6,377	1,570	1,570	1,570	1,570	14,033
Bus Service Improvement Plan	1,174	8,599	0	0	0	0	9,773
Drainage Investigation & Renewal	1,142	1,000	1,000	1,000	1,000	1,000	6,142
Innovative Flood Resilience	870	2,225	1,937	0	0	0	5,032
WYTF - Castle Gateway Development	0	0	4,523	0	0	0	4,523
Special Bridge Maintenance (Struct maint)	849	1,114	622	617	605	605	4,412
Haxby Station	85	1,017	2,000	873	0	0	3,975
York City Walls Restoration Programme	599	615	550	550	550	550	3,414
Replacement of Unsound Lighting Columns	500	637	578	550	550	550	3,365
Flood Alleviation Schemes incl Germany Beck	0	3,254	0	0	0	0	3,254
Askham Bar Hyperhub (Levi)	0	2,043	0	0	0	0	2,043
Essential Bridge Maintenance (Lendal Bridge)	90	1,917	0	0	0	0	2,007
Flood Scheme Contributions	0	1,500	0	0	0	0	1,500
Electric Vehicle Charging Infrastructure (LEVI)	0	1,486	0	0	0	0	1,486
Castle Mills Lock	166	1,234	0	0	0	0	1,400
Access Barrier Review	55	418	200	200	200	0	1,073
Built Environment Fund - Hostile Vehicle Mitigation	1,025	0	0	0	0	0	1,025
Waste Vehicle Replacement	640	85	0	0	0	0	725
Garden Waste Bins	35	265	150	150	0	0	600
Riverside Path	0	200	400	0	0	0	600
Smarter Travel Evolution Programme	121	466	0	0	0	0	587
Parks Investment Fund	0	300	200	0	0	0	500
Street Lighting LED Conversion	331	144	0	0	0	0	475
National Cycle Network 65 Targeted Repairs	180	127	0	0	0	0	307
EV Charging Asset Replacement	4	276	0	0	0	0	280
Non-Highways Structures Investigations & Renewals	0	50	50	50	50	50	250
ZEBRA	237	0	0	0	0	0	237
TCF - Tadcaster Road Improvements	208	0	0	0	0	0	208
Highways Drainage Works	200	0	0	0	0	0	200
Fordlands Road Flood Defences	5	183	0	0	0	0	188
Public Realm and Waste Equipment	0	163	0	0	0	0	163
River Bank repairs	0	148	0	0	0	0	148
P&D machines Parking	0	125	0	0	0	0	125
Fleet & Workshop Compliance	0	105	0	0	0	0	105
Highways - Tadcaster Road	12	90	0	0	0	0	102
CCTV Asset Replacement (incl ANPR)	0	100	0	0	0	0	100
Knavesmire Culverts	0	81	0	0	0	0	81
Flood Risk Operational Improvements	0	80	0	0	0	0	80

	2024/25 £'000	2025/26 £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000	2029/30 £'000	Total £'000
Rufforth Bridge	0	50	0	0	0	0	50
Parks and Open Spaces Development	43	0	0	0	0	0	43
Flood Sign Renewal and Rainfall monitoring	7	28	0	0	0	0	35
Better Play Areas	0	23	0	0	0	0	23
Air Quality Monitoring (Gfund)	1	5	0	0	0	0	6
Electric Charging Infrastructure	3	0	0	0	0	0	3
Hyper Hubs	2	0	0	0	0	0	2
<b>TOTAL GROSS EXPENDITURE</b>	<b>26,337</b>	<b>70,129</b>	<b>49,636</b>	<b>41,516</b>	<b>27,708</b>	<b>21,927</b>	<b>237,253</b>
<b>CITY DEVELOPMENT</b>							
York Central Infrastructure	608	26,132	7,700	2,800	1,920	0	39,160
Castle Gateway (Picadilly Regeneration)	406	1,029	2,882	0	0	0	4,317
Improvements to City Centre & High Streets (UKSPF)	607	0	0	0	0	0	607
Rural Prosperity Fund	385	0	0	0	0	0	385
LCR Revolving Investment Fund	0	300	0	0	0	0	300
Guildhall	0	127	0	0	0	0	127
Built Environment Fund - Shopping Area Improvements	6	6	0	0	0	0	12
<b>TOTAL GROSS EXPENDITURE</b>	<b>2,012</b>	<b>27,594</b>	<b>10,582</b>	<b>2,800</b>	<b>1,920</b>	<b>0</b>	<b>44,908</b>
<b>PROPERTY SERVICES</b>							
Asset Maintenance + Critical H&S Repairs	261	947	675	275	275	275	2,708
West offices - LED Lighting	1,247	83	0	0	0	0	1,330
West Offices Data Centre	25	355	0	0	0	0	380
Hazel Court - LED Lighting	162	96	0	0	0	0	258
Removal of Asbestos	0	222	0	0	0	0	222
Commercial Property Acquisition incl Swinegate	5	141	0	0	0	0	146
West Offices - Major repairs	0	100	0	0	0	0	100
Hazel Court welfare facilities	0	95	0	0	0	0	95
Photovoltaic Energy Programme	0	81	0	0	0	0	81
Fire Safety Regulations - Adaptations	0	77	0	0	0	0	77
<b>TOTAL GROSS EXPENDITURE</b>	<b>1,700</b>	<b>2,197</b>	<b>675</b>	<b>275</b>	<b>275</b>	<b>275</b>	<b>5,397</b>
<b>ICT</b>							
IT Development plan	1,868	4,109	2,820	2,820	2,820	2,820	17,257
IT Superconnected Cities	120	0	0	0	0	0	120
<b>TOTAL GROSS EXPENDITURE</b>	<b>1,988</b>	<b>4,109</b>	<b>2,820</b>	<b>2,820</b>	<b>2,820</b>	<b>2,820</b>	<b>17,377</b>
<b>CORPORATE SERVICES</b>							
Project Support Fund	0	370	369	394	200	200	1,533
Capital Contingency	0	1,376	0	0	0	0	1,376
<b>TOTAL GROSS EXPENDITURE</b>	<b>74,019</b>	<b>180,743</b>	<b>87,917</b>	<b>68,338</b>	<b>48,849</b>	<b>41,072</b>	<b>500,938</b>
<b>TOTAL GROSS EXPENDITURE</b>	<b>74,019</b>	<b>180,743</b>	<b>87,917</b>	<b>68,338</b>	<b>48,849</b>	<b>41,072</b>	<b>500,938</b>
<b>TOTAL EXTERNAL FUNDING</b>	<b>30,293</b>	<b>69,577</b>	<b>43,240</b>	<b>28,566</b>	<b>9,986</b>	<b>7,195</b>	<b>188,857</b>
<b>TOTAL INTERNAL FUNDING</b>	<b>43,726</b>	<b>111,166</b>	<b>44,677</b>	<b>39,772</b>	<b>38,863</b>	<b>33,877</b>	<b>312,081</b>

This page is intentionally left blank



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15 <sup>th</sup> July 2025
<b>Report of:</b>	Garry Taylor, Director of City Development
<b>Portfolio of:</b>	<p>Councillor Kilbane</p> <p>Deputy Leader and Executive Member for Economy and Culture</p> <p>Councillor Lomas</p> <p>Executive Member for Finance, Performance, Major Projects, Human Rights, Equality and Inclusion</p> <p>Councillor Ravilious</p> <p>Executive Member for Transport</p>

## **Decision Report: Major Projects –York Station Gateway & York Outer Ring Road**

### **Subject of Report**

1. The purpose of this report is to provide the Executive with an update on the design, delivery and current progress of York Station Gateway and York Outer Ring Road, including their funding status.
2. The report also seeks approval for the next steps for the delivery of each of the schemes as follows:
  - a) York Station Gateway (YSG) - to complete the approved scheme that is currently delivering on site and agree to an additional funding allocation, made-up of reallocated funding from external grant providers.
  - b) York Outer Ring Road (YORR) - to agree to deliver the scheme in four phases, prioritising available funding to the local plan infrastructure requirements, unlocking key development sites and providing much needed new homes.

- c) To delegate relevant provision to make and accept funding bids against the outline programme to the Director of City Development in consultation with the Director of Governance, the Director of Finance and relevant Executive member(s).

## **Benefits and Challenges**

### **Benefits**

3. Completing the York Station Gateway scheme, will transform the city, creating an attractive and welcoming entrance to the east of the station, complementing the planned new western entrance onto York Central. It will drive accessibility and transport benefits and provide a suitable setting for York's iconic and nationally significant walls together with space and opportunity to encourage people to dwell and linger in what is a unique heritage asset.
4. York is a world-class destination which is home to 200,000 proud citizens and accommodates circa 9m visitors a year, it is critical the YSG is a safe, accessible space that encourages more residents and visitors to choose sustainable rail travel to and from the city.
5. The design of the YSG will complement plans for the footstreets and spaces across the city centre (known as Reimagining York Streets), creating a seamless and cohesive experience and clearly setting out York's offer, both culturally, for economic opportunity and for leisure and retail.
6. YSG will provide significantly improved access to the station for pedestrians, cyclists and public transport users. Make it easier to change between different modes of transport. Create new public spaces and a more pedestrian friendly experience. As well as create an improved setting for the city walls and other heritage buildings in the area.
7. YORR - Taking the recommended phased/iterative approach to deliver the Outer Ring Road will mean the benefits of the Outer Ring Road are delivered where analysis shows they are most needed. By initially focusing on unlocking the Local Plan through junction improvements and active travel routes, more housing for residents will be delivered allowing the city to grow in line with demand. The active travel routes will provide greater options for pedestrians and cyclists. Works will enhance connections to the A1(M), cross country routes and enable better access for residents to wider employment

opportunities, whilst attracting more residents to York. This will also reduce localised congestion and delays.

## **Challenges**

8. Increases in construction costs, inflation, and market volatility have impacted procurement and delivery costs across both schemes.
9. In the case of YSG specifically, abnormal works and the change of specifications to improve access, better cycling provision, and the associated delay, has led to substantial additional costs, which CYC are contracted to fund.
10. The Contract chosen for P2 and P4 which are managed by CYC was New Engineering Contract (NEC)3 Option A which is a fixed priced lump sum with a schedule of activities. This NEC contract operates the EWN -Early Warning Notice and CE -Compensation Event mechanisms for managing risk, change and variations. There were Provisional Sums (PS) (where works are identified but not all of the details around their delivery known) contained in the contract (e.g. the Substation). The inclusion of PS in this type of contract is generally not ideal, as it assumes there is a degree of uncertainty and likely changes / instructions / variations to come, which in this case did materialise.
11. There was also an agreed risk register for allocation of risk items between Client and Contractor. A number of these risks have materialised through the project, and these have largely been elements that were allocated to the Client.

## **Policy Basis for Decision**

12. Delivering York Station Gateway and the Outer Ring Road are key actions within the Council Plan 2023-2027. Both schemes contribute to the council plan vision and will establish the conditions that would make York a healthier, fairer, more affordable, more sustainable and more accessible place, creating more regional opportunities to help today's residents and benefit future generations. Improving the connection of rail and road to the region and beyond will enable economic growth aligned to the emerging MCA Local Growth Plan for the benefit of residents.
13. The York Station Gateway and Outer Ring Road directly contributes to the Climate Change Strategy 2022-2032 and subsequent Local

Transport Strategy 2024-2040, which seeks to reduce carbon emissions from transport by 71%. Prompting more residents and visitors to choose rail and use the sustainable travel infrastructure will directly contribute to the reduction in carbon emissions. The Outer Ring Road includes complementary active travel infrastructure, and will reduce congestion in the city, to enable residents to make modal choices that would also reduce emissions.

14. The Outer Ring Road is also critical to delivering the strategic sites identified in the recently adopted Local Plan, with the phasing focused on delivering the junctions to unlock housing growth – providing much needed homes in the City at pace.
15. These projects will also help to deliver against ‘Our City Centre’ Vision, approved by Executive in October 2023, with particular regard to the themes below:

Theme 1 – Family friendly and affordable city centre

Theme 2 – An attractive, active, and healthy city centre

Theme 3 – A sustainable city fit for the future

Theme 5 – A safe city centre, which is welcoming and accessible to all

Theme 6 – Celebrating heritage and making modern history

## **Financial Strategy Implications**

### **York Station Gateway**

16. Appendix A provides a detailed description of the original works packages and the current works packages. The YSG scheme is to be delivered in five packages as follows,

**Package 1 (P1)** – Enabling works is complete at a cost of £2m

**Package 2 (P2)** – Highway works is in delivery, is 1 year delayed and is estimated to complete at a cost of £26m, this includes the following additional costs:

- Substation works £1.2m,
- Complications relating to contractor accommodation and Utilities consents at the outset £1.4m,
- Delay due to design development/ground conditions and utilities £3.9m
- Additional/ works reprioritised between packages £5m



**Package 3 (P3)** – Station works is currently estimated to cost £23m (including Network Rail (NR) land purchase costs). CYC are in the process of agreeing a fixed price position with London Northeastern Railway (LNER). These works are on land owned by LNER and are to be delivered by LNER. This is part of the Works Agreement entered into by LNER and City of York Council (CYC) on 21<sup>st</sup> July 2022 with an estimated cost at the time of £9.6m plus land purchase costs

**Package 4 (P4)** – Loop Road and short stay is estimated to complete at a cost of £4m. Land costs are included.

**Package 5 (P5)** – Multi-storey car park is estimated to be completed by 2029 and the cost of this will be borne by Network Rail (NR).

17. The current approved budget is £32.4m, which is made up from a combination of funds from West Yorkshire-Plus Transport Fund (WYTF), Department for Transport Transforming Cities Fund (DfT), and LNER funds. In addition, funding of £2.8m is to come from Bus Service Improvement Plan (BSIP) through reprofiling of the current programme and £1m from the 2025/26 Mayoral Bus Grant to provide a current total of £36.2m.
18. Package 4 of the YSG scheme comprises construction of an access route around the York Railway Institute building at the southwestern edge of the station. New bus stands and a turning loop for bus services will be delivered alongside improved and new connections for pedestrians, wheelchair users, wheeling and cycling. New bus stands will enable services to be reallocated from existing stops outside the Railway Station, increasing capacity to help enable ambitions for bus passenger growth and providing a location for rail replacement bus services. The bus loop will allow bus services arriving at York City Centre to turn at the Railway Station, which removes the need for circuitous bus routing, such as operating down Skeldergate and Nunnery Lane, purely to be facing in the right direction at the Railway Station.
19. Reprofiling existing BSIP1 funding into YSG will significantly reduce the risk that the intended benefits to bus users and operators will not be realised. The York Enhanced Bus Partnership agreed in January 2025 that £2.8m of Bus Service Improvement Plan (BSIP) funding

could be reprofiled from delivering radial route bus priority into delivering YSG bus improvements including the new loop road to enable the outlined bus benefits to be achieved. Should Executive be content with the recommendation officers will complete the administrative work with the Department for Transport (Dft) to reprofile the funding. Initial, positive, discussions have been held with the Dft.

**20. Financial Ask – Additional funding of £18.5m to be allocated from within the existing capital programme.**

**York Outer Ring Road**

York Outer Ring Road financial implications are as follows:

21. Current spend on YORR is £14m, with further phases to be funded through a mix of grant funding, future borrowing, and developer contributions aligned with housing delivery.
22. Original estimates for YORR were based on the roundabouts being upgraded (2016) followed by simple dualling (2019) and a non-detailed high-level costing of works in 2020. As part of obtaining the planning permission a more detailed pricing review was undertaken October 2024 with a final report from Pell Frishmann in March 2025. In addition, works were commissioned to market test and estimate the project, this was done in accordance with Association for the Advancement of Cost Engineering (AACE) class 3.
23. The approved budget was originally £67.4m, broken down as follows; DfT £25.1m, CYC £4.3m and WYCA £38m, however recent estimates from our cost consultants indicate a total cost of £164m.
24. This takes account of recent global events, new legislation and the additional needs of the project which impacted significantly on the costings as detailed below. The scale of inflationary impact over this time period is not out of step with that experienced on other major development schemes of this type globally and nationally, with the compounding impact over time, and particular pressures within construction sector activity and supply chains making this a key challenge. Main factors effecting forecasted costs being:
  - a) Increased inflationary pressure due to global and national fiscal events giving industry wide cost increases of over 35% approximately £23.6m.

- b) The impact of guidance and legislation such as LTN1/20 in expanding the needs and requirements for cycling and pedestrian infrastructure, which includes ecology, archaeology and noise restrictions. Approximated £8.7m
  - c) To ensure any changes satisfy the 25 planning conditions. In addition, the technical evaluation of the roundabouts was £44.4m
  - d) Other factors include £10m estimate for structures to incorporate underpasses and new bridges relating to the dualling.
  - e) Estimated utility costs of £7.4m.
  - f) Landscape and Archaeological costs £2.75m.
25. It is proposed to fund this through a combination of (WYTF) from YORR and Castle Mills Bridge, and a request for funding from the York & North Yorkshire Mayoral Combined Authority (YNYCA). Should this approach be unsuccessful, we would need to explore reprioritisation within the capital programme.
26. We would recommend that we ensure as far as possible that we maximise early spend of WYTF on YSG and YNYCA, to ensure that we are spending external funding before committing to borrowing. This will both support delivery against spend milestones with external partners, and minimise borrowing costs associated with wider funding sources, making the cashflow more efficient.
27. We are therefore proposing to deliver this via four distinct phases to match spend to available budget, prioritising elements critical to Local Plan infrastructure, unlocking housing allocations, and avoiding over exposure to financial risk.
28. **Financial Ask - Pre-Tender-Estimates include a 15% Contingency & Inflation allowance of 4.1%.**
29. Commit £27m of existing £52m budget to begin the scheme with the first phase being the delivery of Clifton Moor roundabout, unlocking housing development. Release £14.55m of the remaining budget to complete YSG, subject to WYCA approval and other funding options

outlined below. It is also proposed to add £5m to the scheme as developer contribution.

### **Options to Reduce Costs**

#### **30. York Station Gateway:**

- 31. Do Minimum Option: Deliver a reduced scheme omitting demolition of train operator accommodation (TOC) and the full bus loop design. Estimated cost of £3m. However, this option risks loss of external support and strategic transport integration. A contract was entered into in July 2022, for these works and this option would potentially result in a breach of that contract.
- 32. Value Engineering: Further work could be done on Packages 3 and 4 to rescope to simplify finishes, rationalise materials, and reduce bespoke architectural elements. As many of the materials are present in the Package 2 works this would result in a lack of cohesion within the whole project.
- 33. Phased Delivery: Defer some elements of Packages 3 or 4 into a later phase if matched funding or value capture opportunities arise (e.g. station retail lease income). LNER have explored such options with CYC Planning & Conservation Officers and this conversation is ongoing.

#### **34. York Outer Ring Road:**

- 35. Defer Lower-Priority Junctions: If funding remains constrained, lower-priority junction upgrades could be postponed until housing trigger points or planning gain funding is secured.
- 36. Simplify Underpasses: Assess potential to convert some proposed underpasses to at-grade crossings or simpler infrastructure to reduce ecological and construction complexity.

### **Recommendation and Reasons**

#### **37. Recommendations - The Executive is asked to:**

- a) Note the status and funding position of the YSG and YORR programmes.
- b) Approve the continuation and completion of the YSG scheme – (YSG Option 3 below), including the allocation of an additional

sum of £18.5million, to be funded through a reprioritisation of a combination of external grants and contributions from the rail industry.

- c) Approve the review and renegotiation of any existing grant funding arrangements in relation to the YSG and YORR schemes and delegate authority to the Director of City Development, in consultation with the Director of Governance and the Director of Finance, to conduct that review and renegotiation and to take such steps as are necessary to enter into the resulting agreements.
- d) Approve £2.8m of CYC BSIP1 funding be allocated to the YSG scheme and delegate authority to the Director of City Development, in consultation with the Executive Member, Director of Governance and the Director of Finance, to take such steps as are necessary to enter into any resulting agreements.
- e) Approve the procurement of contractors and specialist support services to enable timely completion of the YSG project and delegate authority to the Director of City Development, in consultation with the Director of Governance and the Director of Finance, to procure such contractors and/or consultants and to take such steps as are necessary to award and enter into the resulting contracts (including any and all planning agreements and/or highways/land agreements as required; however for the sake of clarity this delegation is not for any requirements of either the Local Planning and/or Highways Authority). The delegations given in this recommendation must be exercised within the budgets approved within this report.
- f) Approve the proposed phased approach to delivering the YORR scheme – (YORR Option 3), prioritising infrastructure that unlocks housing and underpins the Local Plan objectives.
- g) Approve the procurement of contractors and specialist support services to enable timely delivery of future phases of the YORR programme and delegate authority to the Director of City Development, in consultation with the Director of Governance and the Director of Finance, to procure such contractors and/or consultants and to take such steps as are necessary to award and enter into the resulting contracts (including any and all planning agreements and/or highways / land agreements as

required; however for the sake of clarity this delegation is not for any requirements of either the Local Planning and/or Highways Authority). The delegations given in this recommendation must be exercised within the budgets approved within this report.

- h) Approve the application for and acceptance of funding bids necessary to deliver the YSG and YORR schemes and delegate authority to the Director of City Development, in consultation with the Executive Member, Director of Governance and the Director of Finance, to apply for and accept such funding bids, and to take such steps as are necessary to enter into the resulting agreements and any subsequent modifications and/or extensions thereto.
- i) Note the financial and delivery risks associated with both schemes and the mitigation measures proposed.
- j) Note the lessons learned to date and instruct officers to carry out a formal lesson learned process post completion of YSG Phase 2 and YORR Phase 1.

## **Reasons**

38. The agreement of the above recommendations will enable the following outcomes:

- a) The completion of key strategic transport and regeneration infrastructure projects that are central to the delivery of the Council Plan 2023–27, the Local Plan, and ‘Our City Centre’ vision.
- b) To secure the regeneration benefits of YSG, including improved active travel links, a transformed public realm, more efficient public transport to and from York Station.
- c) To unlock the delivery of over 3,557 homes (based on local plan allocations) and critical infrastructure through a phased YORR programme, while managing financial risk and maintaining delivery momentum.
- d) To ensure appropriate governance and delegation for the pursuit of funding opportunities that will enable both schemes to be delivered within an affordable and sustainable framework.

- e) To ensure that we have the correct skills and resources to deliver world class regeneration outcomes as befits a globally renowned city.

## **Background**

- 39. The YSG and YORR schemes represent two of the City of York Council's most significant infrastructure and regeneration projects, each delivering long-term benefits to connectivity, active travel, sustainable transport, housing growth, and place-making across the city. Both schemes need to be considered now as they are at key decision points.
- 40. YSG requires additional investment to complete the programme in full following revised cost estimates and tender returns.
- 41. The YSG project has been in development for several years in partnership with NR and LNER, supported by funding from the WYTF and the DfT. It aims to reconfigure the area in front of YSG to improve public transport integration, reduce congestion, improve air quality and deliver a high-quality public realm.
- 42. Appendix 1 – provides a detailed breakdown of what was contained in the original package and what is now in each of the packages.
- 43. YORR requires formal approval for phased delivery and associated procurement to secure continued momentum, unlock development land, and align with available funding.
- 44. YORR is a strategic transport intervention intended to address congestion and journey time reliability around York's outer ring road, support the Local Plan housing allocations, and deliver essential active travel and ecological improvements. It has been developed incrementally, with junction upgrades already completed and the remaining works proposed to be delivered in four prioritised phases.
- 45. The Local Transport Note (LTN) 1/20 which relates to the "Cycle Infrastructure Design" was published by the DfT on the 27th July 2020 and provides guidance and good practice for local authorities to follow. Non-statutory guidance of this nature places the onus on Local Authorities to either follow or exceed the recommendations otherwise there would be a risk of damage or harm (discriminatory, reputational, financial, legal) from non-compliance.

46. As part of the planning review for YORR the outline proposals were evaluated against this document resulting in some key design alterations and requirements some of which are mentioned below:
- a) Reduction of speed limits at all roundabout locations from 60mph to 40mph.
  - b) Scheme limits defined at A19 Shipton Road Roundabout; scheme proposals only allow for the connection of the proposed orbital route to the existing cycling infrastructure and not the crossing of the A19.
  - c) Realignment of the shared cycleway footway between Clifton Moor and Wigginton Road Roundabout; the route now utilises the proposed underpass at Clifton Moor Roundabout with users provided with a shared cycleway footway on the south side of the A1237. This connects into existing provision on Stirling Road via a parallel crossing.
  - d) Provision of Toucan crossing facilities on the south side of Wigginton Road to connect with Stirling Road and the cycleway / footway link currently provided between Wigginton Road and Haxby Road Roundabouts.
  - e) Provision of two Toucan crossing facilities on the east side of Wigginton Road Roundabout to allow users a controlled crossing point across the A1237.
  - f) Provision of a shared cycleway / footway between Wigginton Road Roundabout and a new Toucan Crossing location some 180m to the north. The shared cycleway / footway is proposed to replace the previously proposed outline design
47. All these requirements for compliance have meant an increase in costs from not only construction and infrastructure but also land take.
48. It should be noted that whilst the above guidance is not statutory, non-compliance will reduce our ability to apply for funding from DfT and other government institutions.
49. This report has been brought forward to provide a full update on the status of both projects, to seek approval for the proposed funding, delivery, and governance approach, and to secure the next steps



required to deliver both programmes effectively and within an appropriate financial framework.

**Previous Executive decisions that have impacted this report are listed below.**

### **York Station Gateway**

50. On 26th November 2020, Executive approved the project Delivery and Procurement Strategy and enabled arrangements to be put in place to purchase land, place orders with utility companies and to proceed with the detailed design and procurement of Packages 1, 2 and 4 of the Scheme.
51. At the same meeting, the Executive also approved a revised budget of £25,723k which was funded from West Yorkshire Transport Fund (WYTF) to a value of £12,873k, West Yorkshire Transforming Cities (TCF) to a value of £12,250k and LNER contribution of £600k. The council were also granted £5,005k development funding to pursue land purchase negotiations, place orders with statutory utility providers and proceed with the scheme detailed design of Packages 1, 2 and 4. Following this approval, the drawing down of funds was agreed with West Yorkshire Combined Authority (WYCA) and the project team enacted the Executive approval accordingly.
52. Members were updated by a further report (on the 18th of November 2021) which showed an updated budget (£26,490k) funded from WYTF £12,873k, TCF £13,117k and LNER contribution of £500k. The assumed spend at that time was as follows:
  - I. Package 1 was £3.876m (Including £620k plus fees for land)
  - II. Package 2 was £6.109m
  - III. Package 3 was £7.319m
  - IV. Package 4 was £9.186m.
  - V. Package 5 was to be paid by LNER
53. In August 2024, an Officer Decision was published. This was in response to concerns raised by the York Access Forum (YAF) regarding accessibility and materials used in the YSG design. These changes resulted in increased delivery costs which were necessary to meet equalities obligations and public expectations.

54. The Executive were advised on the 21 January 2025 of the following;
- a) The YSG scheme was to be delivered in five works packages. The first package of enabling works involving the diversion of key statutory utilities from in and around Queen Street Bridge to enable its demolition this was completed in October 2023. This package of work was delivered by CYC and completed on budget.
  - b) Following a procurement exercise, John Sisk and Son were appointed, in August 2023 as the main delivery contractor for Package 2 Highway Works. At the time (21 January 2025) estimated completion of the Package 2 works was February 2026, a one-year delay.
  - c) Package 2 of the scheme required the acquisition of two areas of land: an area of the station long stay car park owned by Network Rail; and an area of land to the front of George Stephenson House owned by Canada Life. Both parcels of land have been acquired at a total cost of £2.8m (including fees).
  - d) A further parcel of land currently in the station car park is required for the delivery of Packages 3 and 4 of the YSG scheme, and negotiations are taking place. At the time of the report dated 21 January 2025 the Package 2 works were forecasting a £7m funding gap to complete delivery.
55. This report builds upon the above decisions and sets out the updated financial, delivery, and strategic case for continuing both programmes.
56. YSG – as advised above owing to further design development, the works package boundaries were redefined, and at the time of going into contract for Package 2, the values of P2 and P4 had been reset as £12.647m and £1.664m respectively. These values were agreed by the project cost planners Turner and Townsend and were subsequently agreed by the West Yorkshire Combine Authority (WYCA) in the approval of the Final Business Case with costs (FBC+). Approval to Proceed on Package 2 was subsequently given by WYCA and the contract with Sisk was signed.
57. It should be noted that if the Works Agreement dated 21 July 2022 had not been entered into CYC would potentially have lost £13.117m from DFT funding for transforming cities.

58. The full value of P2, including project development and land costs is currently estimated as £26.139m (rounded to £26m above). If the project is paused after the delivery of P2, then accounting for land and project development costs across all packages, the overall spend forecasted is £31m (rounded).
59. The value of Package 3 station Works (P3) increased by £2.7m (rounded) following tender returns in January 2025. This tender was non-compliant and was therefore rejected by LNER. CYC and LNER are currently working to deliver a variation to the contract mentioned above dated July 2022, to provide a fixed price to CYC for the package 3 works. The value of P3 is currently estimated as £23m (rounded), this includes land cost and fees for package 3 and CYC Direct costs.

### **York Outer Ring Road**

60. Executive in March 2021 were advised as follows;
- a) The YORR Improvement programme comprises two main elements which have become a single scheme of delivery. Members were reminded that in 2016, a scheme to upgrade seven junctions between Wetherby Road and Monks Cross secured funding through the West Yorkshire Plus Transport Fund administered by West Yorkshire Combined Authority.
  - b) In late 2019, the Department for Transport (DfT) gave endorsement to a Major Roads Network grant for dualling a 7.5km length of the A1237 between A19 Rawcliffe and A1036 Little Hopgrove. This element has now been merged with the junction upgrades, for planning and legal reasons, and this was approved by Members at the Executive Meeting in February 2020.
  - c) For the York Outer Ring Road, Executive has previously endorsed the principle of phased delivery, most recently in November 2023, aligning the scheme with Local Plan infrastructure priorities and housing site unlocks
61. The Executive in January 2025 were advised as follows.
- a) During 2024/25, the focus of activity for the project team was gaining planning approval for the scheme. The scheme was approved by the City of York's planning committee on Tuesday 19 March 2024, and referred to the Secretary of State, and the York

Outer Ring Road planning application was approved on the 12 April 2024.

- b) After the granting of planning approval, a cost review was undertaken with the aim of updating all the key areas of the project such as the latest anticipated cost, programme, risk and land acquisition against the original business case and funding. The review will help inform the required update to the business case for funders and the best way for the project to progress forward through to delivery.
- c) The cost review report which was issued in October 2024 has confirmed that there is a significant funding gap to deliver the whole of the dualling scheme. Due to the funding gap, CYC is looking to reduce the scope of the works to accord with the available funding. This involves optioneering and value engineering to establish what elements of the scheme, in economic terms, are best value for money. Given the nature of the works, the likely reduction in scope will involve sections of the dualling scheme being omitted and focus being turned to upgrade roundabouts and improvements to active travel measures. The outcome of this cost review has generated a number of queries and issues to address prior to determining a way forward and has thus impacted on the programme. The previous programme was to present a report to Executive Committee by November 2024; this has now slipped to July 2025.

### **Next Steps / Lessons Learned**

62. As part of managing major projects going forward officers are undertaking a deep dive into the capital programme, however these are the things that are currently known.
- a) Making Changes once a project has started is very expensive.
  - b) Project Delivery Capacity must be improved including resourcing in legal and procurement, with Corporate Programme Management Office (PMO) including corporate compliance, financial and resource provision and oversight. A number of posts are currently out for permanent recruitment.
  - c) Better oversight of external grants and S106 and their incorporation within the whole approach to capital programme delivery.

d) Wider training, clearer process maps for decisions with clear gateway points, monthly corporate capital programme meetings.

e) A more strategic approach to procurement, which looks at how we package up procurements, partner more effectively and take a 5-year horizon plan with regular overview discussions across the programme.

f) Recognising skills gap and getting staff on board to deliver instead of relying so heavily on external consultants, accepting these will still be needed.

g) It is suggested that governance be strengthened with the introduction of two new meetings Programme Executive Liaison and Corporate Programme Management providing strength to the existing structure.

h) The NEC3 (Form A) Contract should only be used on the basis that the design and scope are sufficiently developed and agreed (with minimal or no provisional sums), and a clearer apportionment of the risk to the contractor.

i) The choice of contract will also be influenced by market conditions and contractor appetite, particularly around risk. Awareness and apportionment of residual risks should be clearly defined and well understood and documented.

j) Ensuring that all legal consents regarding statutory undertakers are agreed and in place prior to signing any Construction Contracts.

k) Required site investigations are as exhaustive as possible to ensure risks are mitigated.

## **Consultation**

63. The above schemes have been developed through extensive consultation with all stakeholders going back many years. In addition, consultation took place throughout the planning process.
64. A version of this report was discussed at Corporate Scrutiny Committee on the 9th of June 2025, and this report has been updated to reflect comments received.

## **Options**

### **65. Station Gateway:**

- a) Option 1 - Station Gateway – Do nothing and stop after package 2.
- b) Option 2 – Station Gateway – Deliver a compromised scheme with no demolition of the train operator's accommodation (TOC) and Cycle heaven with a different taxi solution. It should be noted that City of York Council do not own the land.
- c) Option 3 – Station Gateway - Continue to deliver the full scheme and agree to the funding allocation requested by the Rail Industry.

### **66. York Outer Ring Road:**

- a) Option 1 – York Outer Ring Road – Do nothing. Shelve the project and do not take the works forward.
- b) Option 2 – York Outer Ring Road - Do minimum. Complete the work to the existing roundabouts and do not complete the dualling of the highway between A19 and Little Hopgrove.
- c) Option 3 – York Outer Ring Road – Phase the scheme. Establish a phased approach to the scheme using housing as a criterion to determine the delivery order.

## **Analysis**

### **67. Station Gateway:**

- a) Option 1 - significant cost overruns risk will be eliminated; however, the benefits of the scheme will not be achieved the relationship with the Rail Industry, Government office will be severely damaged bearing in mind we are currently in contracts with LNER. This option would risk a breach of the existing contract. This option is not recommended.
- b) Option 2 - will deliver completed cycle lanes, the bus interchange, portico and semi-permanent taxi / drop off arrangements. This will require circa £3m in expenditure and this will not be supported by the rail industry, this option also puts the bus loop at risk. This option would risk a breach of the existing contract. This option is not recommended.

- c) Option 3 - this option will deliver most of the benefits of the scheme, however, officers will need to confirm that the rail industry will be delivering Package 5. This option will also remove the cost overrun risk on package 3. This would require circa £18.5m additional funding to complete the project. This option is recommended.

## **68. York Outer Ring Road**

- a) Option 1 – The regeneration ambitions for this area would not be achieved. Additional housing could not be delivered for the wider York area. The benefits set out in the section above would not be deliverable. There have been costs to date associated with the achievement of the confirmed design and the planning process these would become abortive costs.

The recent planning application (April 24), that took 18 months to achieve, would lapse within the 3-year period (April 27) requiring a new planning application should the works become viable in the future. In addition, the existing grant funding could be at risk. The further funding opportunities would be lost due to the scheme being abandoned. This option is not recommended.

- b) Option 2 – Limited scheme without the dualling element to the highway between A19 and Little Hopgrove. Whilst some of the housing could be achieved most of the listed benefits (see above) would be compromised or not realised. This would require a new planning application which could take in the region of two years to achieve including the stakeholder engagement and the revised designs required, plus the additional costs associated with a planning application. This option is not recommended.
- c) Option 3 – Deliver existing scheme but through a carefully phased approach. Unlocking the regeneration of the YORR has always presented significant challenges to overcome. The previously agreed delivery approach could be phased and can be achieved. This would allow the current planning permission (April 24) to be utilised and the delay to starting the works therefore minimised. Phasing would allow time to enable further funding streams to be explored and achieved. This option is recommended.

## **Implications - Financial**

### **York Outer Ring Road**

- 69. Current spend on YORR is £14m, with further phases to be funded through a mix of grant funding, future borrowing, and developer

contributions aligned with housing delivery. The whole approved scheme was estimated to cost £66.4m, however recent estimates from our cost consultants indicate a total cost of £164m this has been driven by:

- a) Increased inflationary pressure due to national fiscal events giving industry wide cost increases of over 35%.
- b) The impact of guidance and legislation such as LTN/1/20 in expanding the needs and requirements for cycling and pedestrian infrastructure, which includes ecology, archaeology and noise restrictions.
- c) To ensure any changes satisfy the 25 planning conditions.
- d) Other factors include £10m estimate for structures to incorporate underpasses and new bridges relating to the dualling.
- e) Estimated utility costs of £7.4m.
- f) Landscape and Archaeological costs £2.75m.

70. The recommendations of the report transfer funding from the YORR Scheme to support the completion of the YSG scheme. The impact on the YORR scheme is shown below.

Funding	Remaining Budget at 31/3/2025 £'m	Proposed £'m	Change £'m
WYTF	23.834	9.284	-14.55
DfT Grant	25.093	25.093	-
CYC	3.474	3.474	-
Developer Contributions	-	5.000	+5.0
<b>Total Funding</b>	<b>52.401</b>	<b>42.851</b>	<b>-9.55</b>

71. The additional funding from developer contributions (anticipated from the Clifton Moor roundabout) will mitigate the reduction in the scheme and allow the next phase to progress.



## York Station Gateway

72. Executive approved the budget for York Station Gateway of £26.49m at its meeting 18 November 2021.
73. Executive agreed to an increase of the budget in January 2025 of £5.908m (subject to approval of West Yorkshire Combined Authority) transferring £5m from the York Outer Ring Road Scheme and utilising £908k from the unallocated West Yorkshire Transport Fund Budget. There has also been a £3.8m contribution from Capital Bus Grants to deliver the improved bus infrastructure and loop road at the station. £2.8m is to come from Bus Service Improvement Plan (BSIP) through reprofiling of the current programme and £1m from the 2025/26 Mayoral Bus Grant.
74. This leads to the current budget for the scheme

Funding	Nov 2021 £'m	Jan 2025 £'m
WYTF	12.873	18.781
WYCA Transforming Cities	13.117	13.117
LNER Contribution	0.500	0.500
Contribution from Capital Bus Grants		3.800
<b>Total Funding</b>	<b>26.490</b>	<b>36.198</b>

75. The recommendations of the report add a further £18.5m to the scheme which is proposed to be funded from a reallocation from the West Yorkshire Transport Fund allocation £14.55m and additional funding from the York and North Yorkshire Combined Authority £3.956m.

Funding	Jan 2025 £'m	Proposed £'m	Change £'m
WYTF	18.781	33.331	+14.55
WYCA Transforming Cities	13.117	13.117	0.0
Contribution from Capital Bus Grants	3.800	3.800	0.0
YNYCA	-	3.956	+3.956
LNER Contribution	0.500	0.500	0.0
<b>Total Funding</b>	<b>36.198</b>	<b>54.704</b>	<b>+18.506</b>

76. **Human Resources (HR)** There are no HR implications contained within this report. Should any additional resource be required by the Council to deliver these schemes these would be established and resourced in accordance with Council policy.
77. **Legal** - In respect of the grant funding arrangements for both projects, consideration will need to be given to the impact of varying the schemes for which grant funding has been awarded. Any changes to the schemes may need to be captured in a variation of the relevant funding agreements to ensure the Council remains compliant with the terms of those agreements.
78. For the purposes of the Subsidy Control Act 2022, as most grant funding in relation to both the YSG and YORR Schemes will be used to commission civil engineering and/or construction works packages, or to commission specialist consultancy services in relation to the works, it is anticipated that such funding would not be treated as controlled subsidies under the 2022 Act as:
- I. Any grant funding used by the Council to fund any works, goods and/or services related to these Schemes, will not be seen as giving any contractor, consultant and/or supplier any economic advantage or benefit confer an economic advantage if the relevant works, goods and/or services could reasonably be considered to have been given on the same terms and price as they could have been obtained on the market. This is known as the 'commercial market operator' (CMO) principle. Public authorities will generally be acting in accordance with the

CMO principle when they engage in a compliant competitive public procurement for works, goods or services. Payment for the works, goods or services purchased will, therefore, not generally be considered to confer an economic advantage, as the public authority will be purchasing such goods or services at a market rate.

- II. In addition to (i) above, if a public authority has commissioned works, goods and/or services using grant funding following a compliant competitive public procurement, this will not be seen to have any relevant effect on competition or investment in the UK or international trade or investment.
  - III. If there is any change to how the works, goods and/or services are to be procured Legal Services must be consulted, in order to make a full and proper detailed assessment under the 2022 Act at the start of any grant funding application process that the Council decides to take part in. The Council's collaborative partners may also need to be consulted and take part in any such applications for additional funding.
79. In respect of the YORR scheme, should option 3 be chosen as the preferred option, consideration will need to be given to the legal opinion previously obtained from a barrister in respect of phasing to ensure any such phased scheme remains consistent with the advised approach given in that opinion in relation to potential CPO requirements.
80. The Council's Legal Services team have been and will continue to be consulted on all matters relevant to the YSG and YORR schemes and where appropriate external legal advice may need to be commissioned.
81. **Procurement** - Any proposed works or services on all schemes will need to be commissioned via a compliant procurement route under the Council's Contract Procedure Rules and where applicable, Procurement Act 2023. All tenders will need to be conducted in an open, fair, and transparent way to capture the key principles of procurement. Further advice regarding the procurement routes, strategies and markets must be sought from the Commercial Procurement team.

82. **Health and Wellbeing** - Transport schemes and the built environment have a major impact on health. Liveable and accessible schemes which prioritise walking, wheeling and cycling and which consider and mitigate poor air quality and noise are shown to be linked to reduced rates of obesity-linked diseases such as cardiovascular disease, and diseases such as asthma, Chronic Obstructive Pulmonary Disease COPD and poorer mental health.
83. The integration of active travel options into both schemes covered by this report will be an important part of mitigating these risks, and members will need to be mindful when taking these decisions of the health evidence showing that reducing the number of car journeys people take positively affects health and for example mitigates air and noise pollution, a fact reflected in the Local Transport Strategy aspiration to reduce the number of miles travelled on York's roads by at least 20% by 2030. When the YORR schemes are brought forward, Health Impact Assessments should be considered using the guidance and resources forthcoming in the Healthy Places Supplementary Planning Document.
84. **Environment and Climate action** - The carbon assessment undertaken for YORR shows that the scheme would lead to reductions in operational GHG emissions of 147 tCO<sub>2</sub>e and 935 tCO<sub>2</sub>e in the opening year (2025) and future year (2040) respectively. However, the assessment also shows that scheme would have an overall net adverse impact upon carbon (net of +50,638 tCO<sub>2</sub>e) due to emissions during the construction phase.
85. The scheme proposes a Carbon Reduction Plan to reduce construction carbon emissions, and this will be built into tender documentation and be an important part of any early contractor engagement. Mitigation measures associated with the build phase to reduce the construction emissions will be secured and could include working with contractors to use recovered/recycled/low carbon materials, introducing measures for green site compounds, minimising site vehicle miles and using low emissions/electric site vehicles were possible.
86. The construction element of the scheme will contribute 51,573 tCO<sub>2</sub>e to the UK's fourth carbon budget. This represents only 0.0026% of the budget and therefore within national context is considered to have negligible magnitude. In the local York context, 51,573tCO<sub>2</sub>e represents 5% of the current annual emissions in the city (2022) and

could be considered non-negligible. The assessment follows relevant industry procedure and national guidance in this respect, as contained within the Climate Change Act (as amended) and the Carbon Budget Order 2021.

87. Overall emissions associated with YSG are estimated to be 12,276 tCO<sub>2</sub>e. A Carbon Impact Assessment has been completed with identified mitigations.
88. **Affordability** - York Station Gateway will attract tourism, potentially grow and maintain new and existing businesses and support the creation of new jobs.
89. **Equalities and Human Rights** - A full Equalities Impact Assessment has been completed. It highlights the need for ongoing dialogue with groups who may be impacted by the schemes and there have already been some changes made to designs as a result of this engagement taking place.
90. **Data Protection and Privacy** - The data protection impact assessment (DPIAs) screening questions were completed for the recommendations and options in this report and as there is no personal, special categories or criminal offence data being processed to set these out, there is no requirement to complete a DPIA at this time. However, this will be reviewed following the approved recommendations and options from this report and a DPIA completed if required.
91. **Communications** - As significant projects for the city they require communications support throughout the planning and construction phases, supported by a communications strategy to support and inform residents and businesses. The communications team already work closely with partners on communications for both projects and will continue to do so.
92. **Economy** - The full delivery of YSG and YORR projects is vital for driving economic growth, attracting inward investment and the delivery the agreed objectives of CYC's economic strategy. The YSG project will modernise the city's main transport hub which will in turn improving connectivity and create a more attractive gateway for residents, businesses and visitors.

93. YORR will unlock over 3,557 homes and key development land, supporting housing delivery and the Local Plan which again will be a key enabler in generating direct and indirect economic growth. These projects enhance access to jobs, services, and regional transport links for our residents and businesses making York more competitive and resilient business location. Not progressing these schemes risks losing external funding, delaying housing delivery, and damaging relationships with key partners.
94. **Crime and Disorder** – The Planning permission will be followed to ensure that all secure by Design elements are implemented.
95. **Information Technology (IT)** – There are no IT implications in this report.
96. **Property** – Property implications are covered within this report. Land acquisitions needed for the delivery of the schemes will involve property and legal work requiring internal resources, who will work with the Project Team.

## **Risk Management**

97. The principal risks associated with the York Station Gateway and YORR projects at this stage are reputational, non-delivery and impact loss of revenue. This is why phasing the projects as proposed in this report is necessary, so that the regeneration of this area can progress and is not further stalled.
98. There is a risk that having engaged extensively and raised expectations amongst the public, the change of approach will not fully deliver initial expectations. However, the bigger risk to the city is not to deliver anything and see the regeneration of the area continue to stall.
99. There is a risk of further cost overruns for both schemes in the future. To mitigate this risk improved project management arrangements need to be in place. Regular reviews of the progress and the funding need to be shared with senior managers and any issues acted upon in a timely manner.
100. There is a risk that future funding bids may be unsuccessful, or funding/ grant streams may reduce due to economic conditions. CYC needs to be more proactive in seeking out and achieving additional funding. In addition, future borrowing may be considered.

**Wards Impacted**

101.All wards

**Contact details**

102.For further information please contact the authors of this Decision Report.

Name:	Garry Taylor
Job Title:	Director of City Development
Service Area:	City Development
Telephone:	01904 551263
Report approved:	Yes
Date:	03/07/2025

Name:	Julie Burns
Job Title:	Head of City Development
Service Area:	City Development
Telephone:	01904 551768
Report approved:	Yes
Date:	03/07/2025

Name:	Patricia Salami
Job Title:	Head of Regeneration
Service Area:	City Development
Telephone:	01904 551031
Report approved:	Yes
Date:	03/07/2025

**Specialist officer (s)**

Patrick Looker, AD Finance

**Abbreviations**

BSIP – Bus Services Improvement Plan

FBC – Full (final) Business Case

NR – Network Rail

NEC – New Engineering Contract

TCF – Transforming Cities Fund

WYCA – West Yorkshire Combined Authority

WYTF – West Yorkshire Transport Fund

YAF – York Access Forum

YORR – York Outer Ring Road

YSG – York Station Gateway

**Background papers**

Local Transport Strategy [www.york.gov.uk/LocalTransportStrategy](http://www.york.gov.uk/LocalTransportStrategy)

Climate Change Strategy  
[www.york.gov.uk/ClimateChange10YearStrategy](http://www.york.gov.uk/ClimateChange10YearStrategy)

Economic Strategy [www.york.gov.uk/StrategiesPoliciesPlans](http://www.york.gov.uk/StrategiesPoliciesPlans)

Council Plan [www.york.gov.uk/CouncilPlan](http://www.york.gov.uk/CouncilPlan)

Executive February 2020

York Outer Ring Road Improvements February 2021

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=11116&Ver=4> item 94



Executive November 2020

York Station Gateway Funding and Delivery

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=12407&Ver=4> item 60

Executive March 2021

York Outer Ring Road Phase 1 Dualling

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=12509&Ver=4> item 113

Executive November 2021

York Station Gateway project update

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=12797&Ver=4> item 56

Executive October 2023

Delivering the Vision for the City Centre

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=13931&Ver=4> item 37

Executive November 2023

Capital Programme Monitor

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=13932&Ver=4> item 61

Officer Decision August 2024

(<https://democracy.york.gov.uk/ieDecisionDetails.aspx?ID=7189>)

Decision ID: 7189

Executive January 2025

Budget report

<https://modgov.york.gov.uk/documents/s181116/Capital%20Budget%20Jan%202025.pdf>

## **Annexes**

Annex A: Equalities Impact Assessment (EIA)

Annex B: Data Protection Impact Assessment DPIA)

## **Appendices**

Appendix A: Detailed Package Details

**ANNEX A**

**City of York Council  
Equalities Impact Assessment**

**Who is submitting the proposal?**

<b>Directorate:</b>	City Development		
<b>Service Area:</b>	City Development		
<b>Name of the proposal:</b>	Major Projects - York Station Gateway & York Outer Ring Road		
<b>Lead officer:</b>	Garry Taylor – Director of City Development		
<b>Date assessment completed:</b>	15/05/2025		
<b>Names of those who contributed to the assessment:</b>			
<b>Name</b>	<b>Job title</b>	<b>Organisation</b>	<b>Area of expertise</b>
Laura Williams	Assistant Director Customer, Communities and Inclusion	CYC	Equalities/ Information Governance
Patricia Salami	Head of Regeneration	CYC	Capital programme management
Julie Burns	Head of City Development	CYC	Capital Programme Management

**Step 1 - Aims and intended outcomes**

<b>1.1</b>	<b>What is the purpose of the proposal?</b> Please explain your proposal in Plain English avoiding acronyms and jargon.
------------	--

	<p>This assessment covers two major strategic infrastructure projects: the Station Gateway and York Outer Ring Road (YORR). The Station Gateway aims to redevelop the area in front of York Station to enhance accessibility, improve active travel options, create a high-quality public realm, and support regeneration.</p> <p>YORR focuses on reducing congestion, enhancing journey reliability, and unlocking housing developments by delivering a phased upgrade of the outer ring road.</p>
--	---

<b>1.2</b>	<b>Are there any external considerations?</b> (Legislation/government directive/codes of practice etc.)
	Yes. Both projects are subject to statutory planning, funding conditions from the West Yorkshire Combined Authority and Department for Transport and must comply with the Equality Act 2010 and human rights legislation. Public sector equality duties and environmental regulations also apply.

<b>1.3</b>	<b>Who are the stakeholders and what are their interests?</b>
	Stakeholders include residents, commuters, transport operators (e.g., LNER, Network Rail), local businesses, accessibility groups such as the York Access Forum, planning authorities, developers, and funding bodies. Their interests range from improved connectivity and safety to economic growth, heritage preservation, and equitable access.
<b>1.4</b>	<b>What results/outcomes do we want to achieve and for whom?</b> This section should explain what outcomes you want to achieve for service users, staff and/or the wider community. Demonstrate how the proposal links to the Council Plan (2019-2023) and other corporate strategies and plans.
	Outcomes include enhanced accessibility and safety for all users, especially those with protected characteristics; reduced congestion; increased active travel; support for economic development and housing delivery; and alignment with the Council Plan (2023–2027), ‘Our City Centre’ Vision, and Climate Change Strategy.

## Step 2 - Gathering the information and feedback

2.1	<b>What sources of data, evidence and consultation feedback do we have to help us understand the impact of the proposal on equality rights and human rights?</b> Please consider a range of sources, including consultation exercises, surveys, feedback from staff, stakeholders, participants, research reports, the views of equality groups, as well your own experience of working in this area etc.
Source of data/supporting evidence	Reason for using
Public consultations including feedback from York Access Forum (YAF)	To gather a wide range of views on accessibility from disabled people who live, work, study and visit here, while recognising that this will not cover all views and issues.
Reports from Turner & Townsend (T&T) (cost and impact assessments)	T&T are cost consultants on the scheme and therefore our professional services provider.
Council Plan 2023–2027, Health and Wellbeing Strategy	
Climate Change Strategy	
Project planning documents and financial analysis reports	
Demographic and socioeconomic data from York Open Data	
Stakeholder meetings and formal representations from residents and transport partners	

### Step 3 – Gaps in data and knowledge

<b>3.1</b>	<b>What are the main gaps in information and understanding of the impact of your proposal? Please indicate how any gaps will be dealt with.</b>	
	<b>Gaps in data or knowledge</b>	<b>Action to deal with this</b>
	Limited detailed modelling of long-term socioeconomic impacts across diverse communities	Extend stakeholder engagement to include targeted outreach with underrepresented groups
	Incomplete forecasting of how construction phases will impact those with protected characteristics.	Monitor feedback through implementation and conduct ongoing EIA review
	Limited direct feedback from seldom-heard communities, including rural populations and disabled residents	Collaborate with equality-focused community organisations for more inclusive consultation

### Step 4 - Analysing the impacts or effects.

<b>4.1</b>	<b>Please consider what the evidence tells you about the likely impact (positive or negative) on people sharing a protected characteristic, i.e., how significant could the impacts be if we did not make any adjustments? Remember the duty is also positive – so please identify where the proposal offers opportunities to promote equality and/or foster good relations.</b>		
<b>Equality Groups and Human Rights.</b>	<b>Key Findings/Impacts</b>	<b>Positive (+) Negative (-) Neutral (0)</b>	<b>High (H) Medium (M) Low (L)</b>
<b>Age</b>	Improved active travel infrastructure and safer crossings enhance accessibility for older and younger people.	+	H
<b>Disability</b>	Some design choices (e.g., tactile surfacing, route gradients) initially raised concerns but are	+	H

	now under review after stakeholder input.		
<b>Gender</b>	Neutral impact expected; project benefits are universally accessible.	0	L
<b>Gender Reassignment</b>	No differential impact identified.	0	L
<b>Marriage and civil partnership</b>	No differential impact identified.	0	L
<b>Pregnancy and maternity</b>	Improved pedestrian routes and removal of congestion likely to benefit expectant mothers and those with young children.	+	M
<b>Race</b>	No evidence of differential impact, but further monitoring recommended.	0	M
<b>Religion and belief</b>	No differential impact identified.	0	L
<b>Sexual orientation</b>	No differential impact identified.	0	L
<b>Other Socio-economic groups including:</b>	<b>Could other socio-economic groups be affected e.g., carers, ex-offenders, low incomes?</b>		
<b>Carer</b>	Improved connectivity and safer crossings benefit carers supporting individuals with mobility issues.	+	M
<b>Low income groups</b>	Better transport access supports inclusive access to jobs and services; possible indirect benefit.	+	H
<b>Veterans, Armed</b>	Neutral impact; potential for improved access to support services via better connectivity.	0	L

<b>Forces Community</b>			
<b>Human Rights</b>	Projects promote the right to mobility, decent standard of living, and health by improving access and air quality.	+	H
<b>Other</b>			
<b>Impact on human rights:</b>			
List any human rights impacted.			

**Use the following guidance to inform your responses:**

Indicate:

- Where you think that the proposal could have a **POSITIVE** impact on any of the equality groups like promoting equality and equal opportunities or improving relations within equality groups
- Where you think that the proposal could have a **NEGATIVE** impact on any of the equality groups, i.e., it could disadvantage them
- Where you think that this proposal has a **NEUTRAL** effect on any of the equality groups listed below i.e., it has no effect currently on equality groups.

It is important to remember that a proposal may be highly relevant to one aspect of equality and not relevant to another.

<b>High impact</b> (The proposal or process is very equality relevant)	<ul style="list-style-type: none"> <li>• There is significant potential for or evidence of adverse impact</li> <li>• The proposal is institution wide or public facing</li> <li>• The proposal has consequences for or affects significant numbers of people</li> <li>• The proposal has the potential to make a significant contribution to promoting equality and the exercise of human rights.</li> </ul>
---	--



<b>Medium impact</b> (The proposal or process is somewhat equality relevant)	<ul style="list-style-type: none"> <li>• There is some evidence to suggest potential for or evidence of adverse impact</li> <li>• The proposal is institution wide or across services, but mainly internal</li> <li>• The proposal has consequences for or affects some people</li> <li>• The proposal has the potential to make a contribution to promoting equality and the exercise of human rights</li> </ul>
<b>Low impact</b> (The proposal or process might be equality relevant)	<ul style="list-style-type: none"> <li>• There is little evidence to suggest that the proposal could result in adverse impact</li> <li>• The proposal operates in a limited way</li> <li>• The proposal has consequences for or affects few people</li> <li>• The proposal may have the potential to contribute to promoting equality and the exercise of human rights</li> </ul>

### Step 5 - Mitigating adverse impacts and maximising positive impacts

5.1	<b>Based on your findings, explain ways you plan to mitigate any unlawful prohibited conduct or unwanted adverse impact. Where positive impacts have been identified, what is been done to optimise opportunities to advance equality or foster good relations?</b>
<ul style="list-style-type: none"> <li>• Based on the findings from Step 4, several measures are being undertaken to mitigate potential negative impacts and to promote positive outcomes:</li> <li>• Ongoing engagement with the York Access Forum and other stakeholder groups to review detailed design elements, especially related to accessibility.</li> <li>• Adjustments to materials and tactile surfacing following feedback from people with visual and mobility impairments.</li> </ul>	

- Prioritising the sequencing of phases to avoid disproportionately affecting low-income and carer populations during construction.
- Promotion of inclusive employment opportunities tied to the development process and long-term economic benefits.
- Incorporating human rights principles into project governance to uphold access, non-discrimination, and community participation.

## Step 6 - Recommendations and conclusions of the assessment

6.1	<b>Having considered the potential or actual impacts you should be in a position to make an informed judgement on what should be done. In all cases, document your reasoning that justifies your decision. There are four main options you can take:</b>
	<p><b>No major change to the proposal</b> – the EIA demonstrates the proposal is robust. There is no potential for unlawful discrimination or adverse impact and you have taken all opportunities to advance equality and foster good relations, subject to continuing monitor and review.</p> <p><b>Adjust the proposal</b> – the EIA identifies potential problems or missed opportunities. This involves taking steps to remove any barriers, to better advance quality or to foster good relations.</p> <p><b>Continue with the proposal</b> (despite the potential for adverse impact) – you should clearly set out the justifications for doing this and how you believe the decision is compatible with our obligations under the duty</p> <p><b>Stop and remove the proposal</b> – if there are adverse effects that are not justified and cannot be mitigated, you should consider stopping the proposal altogether. If a proposal leads to unlawful discrimination, it should be removed or changed.</p> <p><b>Important:</b> If there are any adverse impacts you cannot mitigate, please provide a compelling reason in the justification column.</p>
<b>Option selected</b>	<b>Conclusions/justification</b>

<b>Adjust the proposal</b>	The EIA identifies potential problems or missed opportunities. Adjustments are required to address stakeholder concerns, especially regarding accessibility and socio-economic disadvantage.
<b>Adjust the proposal</b>	Justification: Both Station Gateway and York Outer Ring Road projects align with York's strategic goals and demonstrate clear equality and human rights benefits. Concerns raised—such as those from disability groups and low-income communities—are being actively addressed through design adjustments, consultation, and monitoring. Therefore, the proposals should continue with modifications and inclusive oversight.

### Step 7 - Summary of agreed actions resulting from the assessment

7.1	What action, by whom, will be undertaken as a result of the impact assessment.		
Impact/issue	Action to be taken	Person responsible	Timescale
Accessibility concerns (cycleways, surfacing, signage)	Revise design based on feedback from York Access Forum	Project Design Lead	Accessibility concerns (cycleways, surfacing, signage)
Socio-economic access during construction	Sequence works to avoid disruption to key service routes	Project / Programme Manager –	Socio-economic access during construction
Inclusive consultation	Continue engagement with equality groups and community partners	Community Engagement Officer	Inclusive consultation
Monitoring impacts on protected groups	Establish review checkpoints during delivery phases	Equalities Officer	Monitoring impacts on protected groups

---

**Step 8 - Monitor, review and improve**

<b>8. 1</b>	<b>How will the impact of your proposal be monitored and improved upon going forward?</b> Consider how will you identify the impact of activities on protected characteristics and other marginalised groups going forward? How will any learning and enhancements be capitalised on and embedded?
	<ul style="list-style-type: none"><li>• The impact of both the Station Gateway and York Outer Ring Road proposals will be monitored through regular project review meetings, quarterly performance reporting, and updates to the Council's Executive.</li><li>• Equality metrics will be tracked, including accessibility audits, user satisfaction surveys, and consultation feedback analysis.</li><li>• Issues raised during construction or post-implementation will be logged and addressed through established project governance.</li><li>• Independent accessibility reviews will be carried out before each project phase reaches detailed design sign-off.</li><li>• Learning will be documented and shared across council infrastructure programmes to ensure continuous improvement in inclusive planning and delivery.</li></ul>

**ANNEX B****Data Protection Impact Assessment Screening Questionnaire**

To confirm whether a full DPIA is required please go through the below and tick any boxes that are relevant.

<b>Ref number:</b>	
<b>Name and Job title:</b>	<b>Patricia Salami/Lorraine Lunt</b>
<b>Date:</b>	<b>19 May 2025</b>
<b>Description</b> - Explain broadly what you aim to achieve and what type of processing it involves. You may find it helpful to refer or link to other documents, such as a project proposal, business case etc.	
<p><b>Major Projects –York Station Gateway &amp; York Outer Ring Road</b></p> <p><u>Purpose of the report</u></p> <p>To provide the executive with an update on the design and delivery of York Station Gateway and York Outer Ring Road and provide an update on the current progress on each of these schemes including their funding status.</p> <p>The report also seeks approval for the next steps for the delivery of each of the schemes as follows:</p> <ul style="list-style-type: none"> <li>• York Station Gateway (YSG) - to complete the approved scheme that is currently delivering on site and agree to an additional funding allocation, made-up of reallocated funding from external grant providers.</li> <li>• York Outer Ring Road (YORR) - to agree to deliver the scheme in four phases, prioritising available funding to the local plan infrastructure requirements, unlocking key development sites and providing much needed new homes.</li> <li>• To delegate relevant provision to make and accept funding bids against the outline programme to the Director of City Development in conjunction with the relevant Executive Member(s).</li> </ul>	

Are you:

☒ starting a new (or reviewing an existing) project involving the use of personal data.

Are you planning to carry out any

☒ evaluation or scoring

☐ automated decision-making with significant effects;

☐ systematic monitoring;

☒ processing of sensitive data or data of a highly personal nature

☐ processing on a large scale

☐ processing of data concerning vulnerable data subjects

☐ innovative technological or organisational solutions

☐ processing that involves preventing data subjects from exercising a right or using a service or contract.

☐ profiling to make decisions about people

☐ automated decision-making to make decisions about people

☐ process special-category data or criminal-offence data

☐ systematically monitor a publicly accessible place eg CCTV

☐ use innovative technology in combination with any of the criteria in the European guidelines

☒ use profiling to help make decisions on someone's access to a service, opportunity or benefit

☐ use automated decision-making to help make decisions on someone's access to a service, opportunity or benefit

- ☒ use special category data to help make decisions on someone's access to a service, opportunity or benefit
- ☐ carry out profiling on a large scale
- ☐ process biometric or genetic data in combination with any of the criteria in the European guidelines
- ☒ combine, compare or match data from multiple sources
- ☐ process personal data without providing a privacy notice directly to the individual in combination with any of the criteria in the European guidelines
- ☐ process personal data in a way that involves tracking individuals' online or offline location or behaviour, in combination with any of the criteria in the European guidelines
- ☐ process children's personal data for profiling or automated decision-making or for marketing purposes, or offer online services directly to them
- ☒ process personal data that could result in a risk of harm in the event of a breach
- ☒ a change to the nature, scope, context or purposes of existing processing

If you have ticked any of the boxes above, you must complete a full DPIA. Please contact [information.governance@york.gov.uk](mailto:information.governance@york.gov.uk) who will be able to advise and support you to do this

If you have not ticked any of the boxes above, you are not required to complete a full DPIA. However, we must record all decision making regarding DPIA, so please send your completed screening questionnaire to [information.governance@york.gov.uk](mailto:information.governance@york.gov.uk)

**Appendix A**

<b>Package</b>	<b>Original Works</b>	<b>Work Packages Now</b>
P1	BT Openreach fibre diversion	BT Openreach fibre diversion
	Yorkshire water diversion	Yorkshire water diversion
	Northern Powergrid (electricity) diversion	Northern Powergrid (electricity) diversion
	Northern Gas Networks diversion	Northern Gas Networks diversion
		Added was the Civils contractor – Howards Civil Engineering to undertake the ducting work.
P2	Removal of Queen Street Bridge	Substation was removed from package 3 and included in Package 2 as a provisional sum.
	Retaining wall to protect City Walls	
	Reorganisation of Queen Street and Station Road including new bus interchange	
	Super-crossing	
	Build out Arches Square and Station Square	
	Substation relocation	
P3	Construct new TOC accommodation within station or alternative site	Construct new TOC accommodation in the RI Building
	Demolish Parcel Square	Demolish Parcel Square



**Appendix A**

	New façade to station and canopy at Parcel Square	New façade to station and canopy at Parcel Square
	Taxi rank and drop off	Taxi rank and drop off
	Portico works and Tea Room Square	Portico works and Tea Room Square
	Cycle parking in station	Cycle parking in station
	Substation	
P4	Demolish and relocated band room	Demolish and relocated band room
	Construct loop road (including cycle way)	Construct loop road (Including amended cycle way).
	Relocate short stay car parking and accessible parking	Relocate short stay car parking and accessible parking
		Land costs of NR land previously not included in the budget or any of the packages.
P5	Multi-storey car park and reorganisation of all car parking to east of station	Multi-storey car park and reorganisation of all car parking to east of station
	Pedestrian and cycle route Lowther Terrace to the Loop Road	Pedestrian and cycle route Lowther Terrace to the Loop Road

This page is intentionally left blank



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15 <sup>th</sup> July 2025
<b>Report of:</b>	Director of Housing & Communities
<b>Portfolio of:</b>	Executive Member of Housing, Planning and Safer Communities

## **Decision Report: Approval of Property Management Arrangements – Follow-up Report**

### **Subject of Report**

1. As reported to Executive on 22<sup>nd</sup> April 2025, YorHome is a team within Housing Services in City of York Council which operates an ethical letting agency service. It is a non-profit service that allows people who have the means to pay rent (but cannot afford expensive upfront costs) to access the private rented sector. YorHome manage 86 tenancies in 54 properties located in and around York and arrange accommodation for people at risk of homelessness. All tenants are referred to YorHome through the Housing Options Team and the Refugee Resettlement Team and current numbers of people accommodated is 165 with 18 tenants waiting to move in.
2. At the Executive meeting in April the following recommendations were approved in relation to the management agreement that required ratification and rectification, with the Executive Members requesting the additional recommendation (IV):

Resolved:

- I. To ratify the management agreement entered into in late 2024;
- II. To approve the preparation of revised documentation in respect of the management of the property and licences to occupy;

- III. To delegate authority to the Director of Housing and Communities (in consultation with the Director of Governance) to take such steps as are necessary to agree and complete the resulting documents.
  - IV. To propose for the purpose of transparency and accountability that a report is prepared for the Audit and Governance Committee to consider any process issues raised or identified.
3. Following a review of the existing YorHome arrangements this report outlines the need to rectify a number of further arrangements set out in the Exempt Annex B and the need to deliver workable and responsive decision-making processes in line with Council standing orders. Legal Services have reviewed all other YorHome agreements and so the attached Annex B contains the complete set of required changes, with risks and implications set out in Exempt Annex A.
  4. Executive is asked to approve proposals for delegated actions should any further matters arise from those reviews. This will ensure that responsive activity can take place to rectify and secure tenancies quickly for those most at risk of homelessness in the City.
  5. The recommendations in this report seek the ratification of a number of further management agreements entered into prior to April 2025, seeks approval for the preparation of revised documentation in respect of the management of the properties along with licences to occupy granted to the occupants, and delegates authority to the Director of Governance, in consultation with the Director of Housing and Communities to conclude such documentation. In addition, the recommendations look to securing workable and responsible arrangements for the future YorHome operations.

## **Benefits and Challenges**

6. The key benefits of the report are:
  - Helping to meet the challenges set out in the Homelessness and Roughsleeping Strategy 2024-2029;
  - Releasing tenancies in an improved condition; and
  - Reducing risk for landlords and tenants and providing safe and secure homes.

## Policy Basis for Decision

7. The council has adopted the Homelessness and Roughsleeping Strategy 2024-29. The activity undertaken by the YorHome Team ensures that there is a constant supply of affordable private sector accommodation which contributes to meeting the Council's objective to ensure that the Strategy aims to build on existing successes and partnerships to make homelessness *rare, brief and non-recurring*.
8. As part of homelessness prevention, UK government provides funding for refugee resettlement through various schemes, including the UK Resettlement Scheme (UKRS) and the Afghan Citizens Resettlement Scheme (ACRS) and others. Funding is allocated to local authorities, healthcare providers, and community sponsors to support refugees during their resettlement period. This funding covers costs like transitional accommodation, case working, healthcare, and education.
9. In light of the above the Council's Core Commitments clear contribution to **Affordability; Equalities and Human Rights**; and **Health Inequalities** are met by this work and the direct impacts are outlined in the implications section of this report.

## Financial Strategy Implications

10. The government has recognised that there are costs to Local Government in supporting those impacted by homelessness from both the United Kingdom and wider afield. There are a number of funding schemes available to the Council in ensuring these costs do not cause significant burden on the Council's housing budgets. These include Homelessness Prevention Grant, UK Resettlement Scheme, Afghan Citizens Resettlement Scheme, Home for Ukraine Grant amongst others. The majority of costs will be funded from rents received from the tenants. Any upfront costs relating to voids, fees and eligible repairs are to be funded from the resettlement schemes outlined above.

## Recommendation and Reasons

11. The Executive is asked to agree:

- a. To ratify the leases which were inadvertently entered into as outlined in the Exempt Annex B, Table 1;
- b. To approve the preparation of revised documentation in respect of the management and occupation of the properties listed in the Exempt Annex B, Table 1;
- c. To delegate authority to the Director of Governance, in consultation with the Director of Housing and Communities, to take such steps as are necessary to agree and complete the resulting documents;
- d. To ratify the leases entered into as outlined in the Exempt Annex B, Table 2;
- e. To delegate authority for the development of a robust but responsive future decision-making process for property management arrangements, up to the value of £500k, in relation to YorHome to the Director of Governance in consultation with the Director of Finance and Director of Housing and Communities, and the Executive Member for Housing, Planning and Safer Communities.

*Reason:* To ensure appropriate arrangements and documentation are in place in respect of Yorhome managed properties for the current occupiers and new tenants in future.

## Background

12. As described in the opening paragraphs YorHome is a team within Housing Services in City of York Council which operates an ethical letting agency service.

13. The YorHome operating model is based on the following approach:

- All tenants are referred to YorHome through City of York Council housing departments, which includes the Housing Options Team and the Refugee Resettlement Team.

- Prospective tenants are matched with a suitable property; or a suitable property is matched to a suitable tenant.
  - The team match the tenant and property by completing a financial assessment, as well as looking at the tenants' personal circumstances. This is to assess affordability and sustainability of any tenancy.
  - They assist the tenant in the administrative process when moving from either temporary accommodation, dispersal hotels, or from overseas camps into permanent accommodation.
  - This can include, but is not limited to, receipt of relevant benefits, setting up council tax, utilities, and applying for discretionary payments and housing grants.
14. YorHome works alongside several York homelessness charities and organisations including City of Sanctuary, Refugee Action York, Refugee Council and Migration Yorkshire.
15. The current financial model is as follows:
- A full Management Package for management of properties and tenancies charged at a % rate. Staff are kept up to date with changes in legislation and helping landlords remain compliant.
  - Out of Hours contact is available via the CYC Be Independent service for Emergencies.
  - Landlords can sign up for a 2 year minimum period to access potential resettlement schemes and associated government funding which can secure upfront periods of guaranteed rent plus repairs/improvements to bring homes up to an acceptable liveable standard.
  - The team assist tenants with Housing Benefit and Universal Credit claims, maintaining strong relationships with the DWP and Benefits team at CYC. The rents are generally lower or at the Local Housing Allowance (LHA) rate which are used to work out Housing Benefit/Universal Credit housing element amounts to support the payment of the rents. Some of the tenants are in full or part time work.
  - Where there is an agreement which includes 12 +months' rent for the landlord from resettlement funding, the tenant is responsible for paying the full rent from the moment they move

in. They pay this to YorHome for the 12-month period. The tenant is not given a rent free period so that they experience managing their finances and the property is affordable for them from the outset. After 12 months, the tenant will continue to be responsible for the full rental amount, however by then the Team will have spent a full year working with them to ensure that they pay regularly to reduce any risk to the landlord of the tenant defaulting on the rent.

**The properties and changes required:**

16. Details of the previous decision taken by Executive in April 2025 are outlined in the introductory paragraphs of this report and are available to review in the background documents.
17. Arising from further work to understand the extent of further similar issues - details of further properties and the associated matters are contained in the Exempt Annex B.

**Assurances and Improvement Activity**

18. In terms of actions already taken, officer delegations have been amended, all legal templates used by YorHome are being reviewed and revised, and decision-making processes and procedures will be improved and documented, with staff training as appropriate.
19. Veritau, the council's Internal Audit service, has reviewed the current work ongoing, and confirm that Legal Services have identified all the correct matters of concern. Their review will be presented to the Council's Audit and Governance committee as part of an Exempt report, to be prepared in accordance with resolution IV from the April 2025 Executive decision.
20. Councillors can be assured that the work that is taking place, culminating in this report, contains a complete record of all the arrangements of concern. Further due diligence by Legal Services has resulted in no further cases being identified.
21. A manager from outside of the service alongside Veritau will review of all key controls and processes to ensure strong governance, decision-making and due diligence is in place for all future activity. These assurances will also be brought to Audit & Governance Committee, alongside the key findings of the original audit review.
22. It has also been recognised that seeking Executive decisions routinely in a business that needs responsive and timely decision-making to secure affordable rented accommodation in the city for



those residents most in need needs to be reviewed and re-evaluated. The final recommendation therefore asks for approval for officers to determine this mechanism within the Council's procedure rules whilst ensuring there is transparency over the operations of YorHome through, for example, the Annual Housing Report.

## Consultation Analysis

23. This report seeks to ensure the council's decision-making and financial procedure rules are followed, and to ensure that technical legal changes are made to ensure safe management of tenancy arrangements in respect of this property. No consultation is necessary in respect of the content of this report.

## Options Analysis and Evidential Basis

24. The Executive can choose to accept or reject the recommendations in paragraphs 11a, 11b, 11c and 11d. The risks of rejecting the recommendations are covered in the confidential Annex A. Executive is recommended to accept the recommendations to validate the work to date.
25. The Executive can choose to reject or accept Recommendation 11e. To reject could risk the pipeline of rental homes that can be secured through YorHome unless decision making can be responsive. This will directly impact of availability of accommodation for some of our residents most at risk of homelessness. The involvement of Veritau and statutory officers will ensure that the final resolution properly sits within the Council's decision-making procedures, and that there is transparent reporting of activity. Members are recommended to accept recommendation 11e.

## Organisational Impact and Implications

26. Implications are summarised below:
- **Financial.** The council historically has operated the YorHome service by using rents collected to fund the payments due to landlords who enter the service. A management fee covers the

cost of operating and any voids. Where the service uses properties to house resettlement families, the council will use grant funding to for any rent advances, fees, voids or repairs necessary to enable properties to become available. There have been additional legal costs to support the review of the leases. It has also been identified that stamp duty was due on properties arising from the lease agreements. A property by property review of the anticipated costs and revenues is being undertaken to determine both the overall cost of the arrangements and also the most appropriate funding stream for each property. The full cost will not be known into the completion of the work. This will however be reported to Executive through the regular finance and performance reports. It is not expected that there will be any impact to council tax funded budgets.

- **Human Resources (HR).** There are no direct HR implications of this report other than additional training required..
- **Legal.**
  - The Council has power to enter into the property managing arrangements and to charge to recover the costs of provision under Section 93 of the Local Government Act 2003.
  - It is necessary to rectify the arrangements that are in place in relation to the management of the properties identified in Exempt Annex B, Table 1, and the leases of the properties identified in Exempt Annex B, Table 2 to ensure the arrangements are fit for purpose and the Council is not exposed to unnecessary risk. Legal officers continue to work with the Yorhome team to identify the most effective way to document the arrangements at the properties to ensure any risk to the Council is minimised and mitigated as much as possible.
  - The use of grant funding for the initial rent payments, and possibly upfront costs relating to voids, fees and eligible repairs from the grant funding schemes referred to in the report, is in accordance with the grant funding agreements in place for those schemes.
- **Procurement.** There are no procurement implications of this report.
- **Health and Wellbeing.** Preventing homelessness is critical to public health. The health of people experiencing homelessness is significantly worse than that of the general population and poor mental and physical health is both a cause and consequence of homelessness.

- ***Environment and Climate action.*** There are no known direct implications, although improving homes may improve energy efficiency and reduce bills.
- ***Affordability.*** The report carries significant and positive implications for residents who are severely impacted by the risk of homelessness and trauma. This gives a chance of stability and recovery whilst living in an affordable home, within a city where the availability of these properties is a rare opportunity.
- ***Equalities and Human Rights,*** Given the rectifying nature of this decision and that the report does not propose changes to policy, practice, or any significant service alterations, a comprehensive Equality Impact Assessment (EqIA) has not been conducted. Careful consideration, however, has been given to potential impacts on individuals with protected characteristics and any additional support needs of the property's residents. Although time constraints prevented the consultation process required for a complete EqIA, we have balanced this against the fact that this property will provide much needed safe and secure accommodation for those facing homelessness, which necessitates making this decision promptly.
- ***Data Protection and Privacy.*** The data protection impact assessment (DPIAs) screening questions were completed for the recommendations and options in this report and as there is no personal, special categories or criminal offence data being processed to set these out, there is no requirement to complete a DPIA at this time. However, this will be reviewed following the approved recommendations and options from this report and a DPIA completed if required.
- ***Communications.*** The communications implications of this report centre around the need for clear, transparent messaging that highlights the positive outcomes of this opportunity while acknowledging and addressing any process improvements. Communications will reassure stakeholders that appropriate steps are being taken to rectify the legal and governance issues identified, including improvements to processes and staff training. Emphasis will also be placed on the broader value of the scheme, supporting the Council's Homelessness and Rough Sleeping Strategy, providing affordable and secure accommodation, and helping some of York's most vulnerable residents.
- ***Economy.*** Everyone's reasons for becoming homeless are unique however access to a home and an address they can afford and call their own, is often a significant factor. The provision of affordable accommodation to support those at risk of becoming homeless as a preventative measure can provide time and space

to get the wider support they might need and provide a secure, stable environment to maintain existing or provide a pathway to new employments.

## Risks and Mitigations

27. Through the establishment of required approvals and rectified legal documents this report mitigates the risks of:
- Unapproved management and associated agreements breaching the council's financial and decision-making standing orders; and
  - Potentially unlawful tenancy agreements which could lead to early eviction of tenants in already vulnerable circumstances.
28. The council is reviewing all similar and related arrangements. In terms of actions already taken officer delegations have been amended, all legal templates used by YorHome are being reviewed and revised, and decision-making processes and procedures will be improved and documented, with staff training as appropriate. This is a critical service which must be safeguarded in order to provide safe and secure tenancies for some of York's residents who are most at risk of homelessness and deprivation.

## Wards Impacted

All Wards

## Contact details

For further information please contact the authors of this Decision Report.

## Author

<b>Name:</b>	Pauline Stuchfield
<b>Job Title:</b>	Director of Housing & Communities
<b>Service Area:</b>	Housing & Communities
<b>Report approved:</b>	Yes
<b>Date:</b>	04/07/2025

## Background papers

Approval of Homelessness and Roughsleeping Strategy 2024-29  
- Executive 12<sup>th</sup> December 2024:

[Agenda for Executive on Thursday, 12 December 2024, 5.30 pm](#)

Approval of Property Management Arrangements – Executive 22<sup>nd</sup> April 2025

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=14507&Ver=4>

## Annexes

Exempt Annex A: Full report containing exempt information.

Exempt Annex B: Confidential Information Regarding YorHome Agreements requiring Approval/Rectification

## Abbreviations

ACRS	Afghan Citizens Resettlement Scheme
CYC	City of York Council
DWP	Department of Work & Pensions
EqIA	Equalities Impact Assessment
HMO	House in Multiple Occupation
HR	Human Resources
LHA	Local Housing Allowance
UK	United Kingdom
UKRS	UK Resettlement Scheme

This page is intentionally left blank

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A  
of the Local Government Act 1972.

Document is Restricted

This page is intentionally left blank



Document is Restricted

This page is intentionally left blank



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15 July 2025
<b>Report of:</b>	Director of Housing and Communities
<b>Portfolio of:</b>	Executive Member for Finance, Performance, Major Projects, Human Rights, Equalities and Inclusion and Executive Member Housing, Planning and Safer Communities

## Decision Report: Equity, Diversity and Inclusion Strategy

### Subject of Report

1. In April 2024 a report to Executive presented the results of an externally facilitated assessment against the recently refreshed Equalities Framework for Local Government (EFLG).
2. This work fed into a Draft Equity, Diversity and Inclusion (EDI) Strategy. At the Executive meeting of April 2024 Members approved a recommendation to consult on the draft strategy which would inform a final document for adoption, with a linked action plan. Public consultation ran from January to March 2025 and the data is available here <https://data.yorkopendata.org/dataset/cyc-equity-diversity-and-inclusion-strategy-consultation-2025>
3. This report asks for Executive approval for both the final strategy and annual action plan.

### Benefits and Challenges

4. This work sits alongside other recent areas of development and action including re-establishment of the Human Rights & Equalities Board, the council's adoption of the Social Model of Disability and its Anti-Racism Action Plan and Gypsy and Traveller Action Plan.

5. It builds on the city's designation and partnership working with regard to City of Sanctuary, Human Rights City and pledge to be an Anti-Racist City and recognised growing cross partnership strengths in these areas.
6. Recognising the journey the council has begun, reflecting both the feedback from respondents to the survey and wider environmental context within the city where hate crimes are rising and community groups still report concerning challenges, the strategy sets out the council will work toward 'excellent' against the EFLG through an annually updated action plan. This will ensure progress is supported and championed across the council, and the impact positively recognised by community groups, rather than the focus being to complete a check list of actions to achieve a grade.

## **Policy Basis for Decision**

7. The Council Plan 'One City, For All 2023-2027' states: Equalities and Human Rights - Equality of opportunity 'We will create opportunities for all, providing equal opportunity and balancing the human rights of everyone to ensure residents and visitors alike can benefit from the city and its strengths. We will stand up to hate and work hard to champion our communities'.
8. The impact of this work will affect every element of the Council Plan and associated policies.
9. This work will contribute to the council's core commitments around:
  - a) Equalities & Human Rights – this report is fully focused on meeting this core commitment.
  - b) Affordability – inequity and exclusion can impact on access to jobs, skills development and economic opportunity and so any improvements made will have direct benefits of the financial and economic wellbeing of the community.
  - c) Climate & Environment– there are no likely direct impacts on the Environment of this report although celebration of diverse cultures will bring a positive contribution to our community places and spaces.
  - d) Health – there are known health disparities for people from all groups with protected characteristics, both nationally and as seen

in data on the health of people in York, and any improvement in opportunity impacting on health and wellbeing will have a positive impact on communities.

## **Financial Strategy Implications**

10. The costs relating to this report will be contained within existing budgets. Some elements of workforce monitoring may be limited or otherwise by the nature and capability of systems in use and data available which require further investment as part of ICT development plans.
11. Resources have been recruited into the Housing and Communities Directorate to support EDI and Human Rights work corporately, utilising the £50k growth built into the 2024/25 budget strategy.
12. There was a further £50k budget growth in 2025/26 for Disability Equity Training for Officers and Members to meet the commitment made to implementing the Social Model of Disability.
13. The work across all directorates could be considerable in terms of meeting statutory equalities and human rights responsibilities, including the need for additional training resources to support the delivery of these responsibilities.
14. Considering the council's current financial challenge, funding any further growth in this area of work will require compensatory savings to be identified elsewhere across the Council.

## **Recommendation and Reasons**

15. That Executive approve the following:
  - a. the final Equity, Diversity and Inclusion Strategy and associated Annual Action Plan (the 'key deliverables' for Year 1 of the Strategy)
  - b. A progress report being produced every 12 months for the annual public meeting of the Human Rights and Equalities Board.

Reason: To demonstrate City of York Council's core commitment to becoming a more equal, diverse and inclusive council.

## Background

16. Last year an assessment against the requirements of the Equalities Framework for Local Government (EFLG) was undertaken by an external consultant and at the Executive meeting in April 2024 the council adopted a draft strategy, pending the outcome of consultation. The strategy is a key part of the council's plan to make significant progress against the EFLG improving achievement against all elements of the framework:
  - Understanding and working with your communities
  - Leadership, partnership and organisational commitment
  - Responsive services and customer care
  - Developing a diverse and engaged workforce
17. This work sits alongside other recent areas of development and action including re-establishment of the Human Rights and Equalities Board (HREB), the Council's adoption of, and work in progress to deliver the Social Model of Disability, the Anti-Racism Strategy and the Gypsy and Traveller Action Plan. It builds on the city's designation and partnership working with regard to City of Sanctuary, York Human Rights City and the pledge to be an Anti-Racist City and recognised growing cross partnership strengths in these areas.
18. In addition to further growth funding for training, within the Council examples of other areas of corporate improvement include:
  - Recruitment to the role of Head of EDI;
  - Production of ethnicity pay gap data to start to understand where inequity lies within our workforce for staff from a pay and progression perspective alongside qualitative data from staff groups and surveys;
  - Development of Human Rights & Equality Analysis templates for decision-making;
  - Training on addressing microaggressions;
  - Training and policy on new duty to prevent sexual harassment;
  - Establishment and training of Domestic Abuse Champions;
  - Recognition of people with care experience as if it were a Protected Characteristic under the Equality Act 2010.

- Adoption of the Poverty Truth Commission's Charter for Organisation Standards.
19. Following approval from Executive, council officers carried out a public consultation on the draft Strategy as outlined above. This had a qualitative and quantitative focus with a survey (on and offline) receiving around 500 responses. In addition, five focus groups and one public meeting were held with the following groups with protected characteristics:
- People with learning difficulties;
  - Older people;
  - Young adults;
  - Neurodiverse people; and
  - Members of the LGBTQIA+ (Lesbian, Gay, Bisexual, Trans, Queer, Questioning, Intersex, Asexual, + holds space for the expanding and new understanding of different parts of the very diverse gender and sexual identities) community.
20. Officers also held a public meeting and engaged with residents on social media.
21. The responses captured in the public consultation gave a helpful insight into how the council can build on skills in the workforce to develop capacity to support and embed a whole organisation shift in equity, inclusion and diversity.
22. Officers are also taking forward some proposals put forward during the consultation for quickly implementable improvements e.g. small changes to the website.

## **Consultation Analysis**

### **Results of the consultation –**

23. Below are the headlines from the public consultation and the changes made to the EDI Strategy as a result:
- 1 in 5 have experienced or witnessed intolerance or discrimination from CYC
  - Respondents want a clear and actionable commitment on EDI from the Council (only 55% agree the commitment in the Strategy is clear)
  - 1 in 4 disagree that Council's services are accessible to all it's communities

- Objectives 1 and 4 were seen as most important
- Only 35% believe the Council provides opportunities for community groups to influence decision-making
- The public wants concrete action, leadership to drive the strategy forward and continuous engagement with protected groups.

24. As a result of the above feedback from the public, the following changes have been made to the EDI Strategy:

- Made it simple –the objectives have been consolidated with the aims and commitments, providing a succinct vision with clear ‘business case’;
- Concrete action –the Key Deliverables will be published ahead of each year to show the measurable outputs from taking action. Year 1 Key Deliverables are in the table below;
- Continuous engagement – an annual report will be published on progress as part of public HREB meeting, and progress will be shared in a way that is accessible to all groups;
- Driven by leadership – so that Members and officers are seen to address EDI in service plans, we require that service plans have at least one EDI objective

### Annual Action Plan

Key deliverables by end of June 2026	Owner
<b>EDI Strategy and annual report</b> <ul style="list-style-type: none"> <li>• Shared across CYC, Partners and EDI bodies.</li> <li>• Annual progress report published for HREB public meeting.</li> </ul>	Human Rights and Equalities Board Chairs
<b>Human Rights &amp; Equalities Champions</b> <ul style="list-style-type: none"> <li>• Each Head of Service nominates Champion.</li> <li>• Champions receive HREA Tool training and are responsible for ensuring completion of assessments.</li> </ul>	Equity, Diversity and Inclusion Team
<b>Launch Human Rights &amp; Equity Analysis tool</b> <ul style="list-style-type: none"> <li>• Training on the tool will be mandatory for the Leading Together group, completion of the training will form part of PDRs in order to track attendance.</li> <li>• Completed impact assessment will be required for forward plans.</li> </ul>	Assistant Director for Customer, Communities & Inclusion



<ul style="list-style-type: none"> <li>• For all service areas that publish reports, must publish at least one completed assessment by June 2026.</li> <li>• At least one EDI objective needs to be incorporated into service plans.</li> </ul>	
<b>Disability equity training</b> <ul style="list-style-type: none"> <li>• Annual roll out as part of design.</li> <li>• Participants indicate increased confidence in supporting disabled people.</li> <li>• Training delivered to Members, Senior Officers and target groups at CYC.</li> </ul>	EDI Team and Human Resources
<b>All areas have EDI data</b> <ul style="list-style-type: none"> <li>• Staff and citizens respond positively on a question added 'I was treated with dignity &amp; respect'.</li> <li>• Show how we are using data to inform service design, development and improvement, by having at least one EDI objective in each service plan by June 2026.</li> </ul>	Business intelligence
<b>Recruitment impact analysis</b> <ul style="list-style-type: none"> <li>• Complete assessment working with staff networks and agree actions</li> </ul>	HR
<b>Progression impact analysis</b> <ul style="list-style-type: none"> <li>• Develop a mechanism to report on progression within the organisation</li> <li>• Complete an assessment of available data, including both quantitative and qualitative data. Collaborate with staff networks and agree actions</li> </ul>	HR
<b>EDI training with anti-racism focus to be built into staff training plans</b> <ul style="list-style-type: none"> <li>• Complete a mapping exercise of existing EDI-related training and expertise, including service specific training.</li> <li>• Where possible replicate existing training and develop new training across managers and staff, ensure this addresses anti-racism, cultural awareness and issues facing Gypsy &amp; Traveller communities.</li> <li>• Success will be measured by participants indicating increased confidence and understanding with regards to anti-racism.</li> </ul>	EDI Team, HR and Directors

## Options Analysis and Evidential Basis

25. There is no other recommendation but to accept the recommendations at paragraph 15. As the Public Sector Equality Duty requires the council to publish its equality objectives every four years, if Executive chose not to sign off this strategy these at least should be published.

These would give a line of sight for all the council's work which needs to have EDI and Human Rights considerations and implications embedded into its values, processes plans and decision-making mechanisms.

As noted in paragraphs 27 and 28 there is significant risk to the council were we not to adopt the actions proposed.

## Organisational Impact and Implications

26.

### Financial

- The financial implications are described in paragraphs 10-14 above and outline that, in light of the council's continued financial challenges, any additional costs will be managed by reprioritising existing budgets. Whilst the staffing costs incurred in doing this work will remain within existing budgets, further resources may be needed for training purposes across all equalities responsibilities.
- Considering the council's continued financial challenges, any additional costs will need to be managed by making compensatory budget cuts elsewhere within the Council or through reprioritising existing budgets.

### Human Resources

- An additional post has been created to lead EDI in the council taking forward the operational actions in the action plan. Human Rights and equalities training / awareness will be undertaken to embed actions into all aspects of everyday working at the council. HR will work alongside the Head of Equity, Diversity and Inclusion to review the outcome of the risk assessments and resulting policy/process implications referred to in the report and annexes.

## **Legal**

- The Council needs to take into account the Public Sector Equality Duty under Section 149 of the Equality Act 2010 (to have due regard to the need to eliminate discrimination, harassment, victimisation and any other prohibited conduct; advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it and foster good relations between persons who share a relevant protected characteristic and persons who do not share it in the exercise of a public authority's functions).
- Under the Human Rights Act 1998 it is unlawful for a public authority to act in a way which is incompatible with the rights set out in the Convention for the Protection of Human Rights and Fundamental Freedoms, agreed by the Council of Europe at Rome on 4th November 1950 ("the Convention"). In particular, the enjoyment of the rights and freedoms set out in the Convention must be secured without discrimination on any ground such as sex, race, colour, language, religion, political or other opinion, national or social origin, association with a national minority, property, birth or other status.
- The report gives an update on how the council is seeking to meet its obligations under Equalities and Human Rights Acts with regard to all people protected under those Acts.

## **Procurement**

- There are no direct procurement impacts contained in this report. However, protected characteristics under the Equalities Act can be focused on when considering social value in procurement.

## **Health and Wellbeing**

- Health implications are covered in paragraph 9 above as one of the council's core commitments. Public Health and the Director of Public Health support the intentions within this report. Overall, promoting equality contributes to the creation of healthier, more resilient communities where individuals can thrive and enjoy a higher quality of life.

## **Environment and Climate**

- The design and implementation of services to achieve our climate change ambition will follow the principles of the EDI Strategy. The negative impacts of climate change are most likely to be experienced by disadvantaged and vulnerable groups; EDI is

therefore essential in ensuring a just transition towards net zero and that appropriate adaptation measures are delivered to support these groups.

### **Affordability**

- Inequity and exclusion can impact on access to jobs, skills development and economic opportunity and so any improvements made as a result of this report will have direct benefits of the financial and economic wellbeing of the community.

### **Equalities and Human Rights**

- There will be a need to ensure resources are dedicated to all equalities work across all protected characteristics under the Equalities Act. A full EIA is included at Annex C.

### **Data Protection and Privacy**

- Data protection impact assessments (DPIAs) are an essential part of our accountability obligations and is a legal requirement for any type of processing under UK data protection and privacy legislation. Failure to carry out a DPIA when required may leave the council open to enforcement action, including monetary penalties or fines.
- DPIAs helps us to assess and demonstrate how we comply with all of our data protection obligations. It does not have to eradicate all risks but should help to minimise and determine whether the level of risk is acceptable in the circumstances, considering the benefits of what the council wants to achieve.
- The completion of data protection impact assessment (DPIA) screening questions evidenced there would be no processing of personal data, special categories of personal data or criminal offence data processed, so there is no requirement to complete a DPIA

### **Communications**

- Building on work already done in internal communications around the Council Plan's Equalities commitment, and in the ongoing annual communications plan, visible and consistent communications approaches will be required to support and demonstrate the City of York Council's core commitment to becoming a more equal, diverse and inclusive council.

### **Economy**

- As with the affordability implications, the report will have a positive impact on access to jobs, skills development and economic

opportunity if equitable and inclusive policies are embedded and diversity is baked into the council's culture.

## Risks and Mitigations

27. Should the actions in this report not be delivered, the council will fail to make progress and to be taken seriously with regards to any and all aspects of equity and inclusion. As such the council will remain unrepresentative of its communities and will not be seen as a fair and inclusive employer. It will also fail to achieve in its ambition to be Excellent against the EFLG. Management of resources, capacity and close monitoring of action plans will need to be in place to mitigate these risks.
28. Impacts for the city as a whole could be significant, impacting on the city's reputation as a welcoming and safe city in which to live, work, visit and do business. The actions in this report will seek to support the hard work of partners and council teams in relation to city wide work.

## Wards Impacted

All

## Contact details

For further information please contact the authors of this Decision Report.

### Author

<b>Name:</b>	Laura Williams
<b>Job Title:</b>	Assistant Director Customer, Communities and Inclusion
<b>Service Area:</b>	Housing and Communities
<b>Report approved:</b>	Yes
<b>Date:</b>	03/07/2025

## Co-authors

<b>Name:</b>	Laura Swiszczowski
<b>Job Title:</b>	Head of Equity, Diversity and Inclusion
<b>Service Area:</b>	Housing and Communities
<b>Name:</b>	Lauren Summers
<b>Job Title:</b>	Communications Manager
<b>Service Area:</b>	Communications and Engagement

## Background papers

- ‘*Gypsy and Traveller Action Plan – Annual Update*’, Decision Session – Combined Executive Member Decision Session, 3 June 2025, [Agenda for Decision Session - Combined Executive Member Decision Session on Tuesday, 3 June 2025, 10.00 am](#) (Item 5)
- ‘*Pre-Decision Scrutiny: Equity, Diversity and Inclusion Strategy*’, Corporate Services, Climate Change and Scrutiny Management Committee, 12 May 2025, [Agenda for Corporate Services, Climate Change and Scrutiny Management Committee on Monday, 12 May 2025, 5.30 pm](#) (Item 72)
- ‘*Adoption and implementation of the York Poverty Truth Commission’s Charter for Organisation Standards*’, Executive, 11 March 2025, [Agenda for Executive on Tuesday, 11 March 2025, 4.30 pm](#) (Item 88)
- [Equality Framework for Local Government | Local Government Association](#)
- ‘*Gypsy and Traveller Action Plan*’, Executive, 9 May 2024, <https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MIId=14497&Ver=4> (Item 128)
- ‘*Consultation on an Equity, Diversity and Inclusion Strategy 2024-27 and Next Steps*’, Executive, 18 April 2024, <https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MIId=13938> (Item 117)

- ‘*Implementing the Social Model of Disability*’, Decision Session - Executive Member for Finance, Performance, Major Projects, Human Rights and Equalities, 24 January 2024, <https://democracy.york.gov.uk/ieListDocuments.aspx?CId=1060&MId=14294&Ver=4> (Item 13)
- ‘*Refreshed Governance Arrangements for York’s Human Rights and Equalities Board*’, Executive, 14 December 2023, [Agenda for Executive on Thursday, 14 December 2023, 5.30 pm](#) (Item 68)
- ‘*Anti Racism and Inclusion Strategy and Action Plan*’, Executive, 13 July 2024, [Agenda for Executive on Thursday, 13 July 2023, 5.30 pm](#) (Item 18)
- ‘*Care Experience as a Protected Characteristic*’, Executive, 14 November 2024, <https://democracy.york.gov.uk/ieListDocuments.aspx?CId=733&MId=14502#AI69235> (Item 54)

## Abbreviations

EDI – Equity, Diversity and Inclusion

EFLG – Equalities Framework for Local Government

HREB – Human Rights and Equalities Board

LGA – Local Government Association

LGBTQIA+ - Lesbian, Gay, Bisexual, Trans, Queer, Questioning, Intersex, Asexual, + holds space for the expanding and new understanding of different parts of the very diverse gender and sexual identities.

## Annexes

- Annex A – Final Equity, Diversity and Inclusion Strategy
- Annex B – Equalities Impact Assessment

This page is intentionally left blank



**City of York Council  
Equity, Diversity &  
Inclusion  
Strategy 2025-2028**

## ANNEX A

### Contents

1. Our Vision
2. Definitions and current state
3. Equality Act 2010 and Public Sector Equality Duty
4. Our Equity, Diversity & Inclusion Commitment and Promise
5. What we will do
6. Responsibilities
7. Monitoring and Evaluating the Strategy
8. Appendix

## ANNEX A

**Our Vision**

As a core commitment within our Council Plan, we are ambitious for, and committed to, achieving continuous improvement and equity across all our services and functions.

Why is equity, diversity and inclusion important to CYC? First and foremost, accelerating equity, diversity and inclusion is simply the right thing to do. Secondly, there is a strong ‘business’ imperative for CYC to really embed EDI in its practices and services, borne out by the data. We have seen a 200% increase in racial hate crime in the last year in our city. YouGov data shows that 78% of UK 18-24 year olds consider “acceptance and inclusion of employees of all backgrounds” when searching for jobs. Research by McKinsey found that having diverse teams leads to an increase in problem-solving, and ultimately better decision making and performance.

We aim to deliver services that are equally accessible to all our customers and to implement robust strategies and policies that are person centred and considerate of needs. As an employer we will ensure equity in the recruitment, training and promotion of our employees. We will also celebrate diversity within the workplace and our city, encourage our employees to embrace continuous learning and development in all aspects of their role as officers and as individuals supporting our communities. Our Equity, Diversity & Inclusion strategy ensures we deliver on our commitments and drive change at all levels of the Council.

We will collaborate with our strategic partners, as well as employees, trade unions, community groups, service users, citizens and customers to co-produce initiatives and deliver the change we aspire to. We are proud to continue deliver against our commitments as a Human Rights City and City of Sanctuary and seek to support and include all members of our communities to be the best they can be in our city.

Our Equity, Diversity & Inclusion strategy is a living document, which will be constantly under review by our Corporate Equity, Diversity &

## ANNEX A

Inclusion Group as well as our external stakeholders. We welcome any comments and collaborative working, which may inform the process. We will report annually on the progress we have made and include any new actions.

We believe that this strategy and action plan not only highlights the council's commitment to achieve true equity, celebrate diversity and secure the inclusion of all, but also makes us transparent and accountable.

Finally, we would like to express our support for and commitment to this strategy and look forward to seeing positive outcomes and benefits emerge from its implementation.

**Cllr Claire Douglas**

**Ian Floyd**

Leader of the Council

Chief Operating Officer

## ANNEX A

## 1. Definitions and current state of play

### Equity

*Equity* is about the fair treatment for all people, so that strategies, policies, procedures and practices that are being implemented ensure that protected characteristic identity is not predictive of life chances, opportunities and outcomes.

*Equality* presumes that all people should be treated the same. However, equity has a different approach. Equity takes into consideration a person's or a community's protected characteristics, for example disability, race/ethnicity (including Gypsy & Traveller ethnic groups), sex, religion/belief, age, sexual orientation, gender reassignment/identity, social class, maternity/paternity, marriage or civil partnership and promotes the adjustments to service or employment practice to ensure that the outcome is equal. Equity recognises that structures, bias and lack of opportunities lead to disadvantage.

### Diversity

The Council values *diversity* and recognises that different people bring different perspectives, ideas, knowledge and culture and that this difference brings great strength. A wider talent pool provides new perspectives and is proven to create innovation.

We believe that discrimination or exclusion based on characteristics protected under the Equality Act 2010, which are age; disability; sex; gender reassignment, marriage and civil partnership status; pregnancy and maternity; race; religion or belief; sexual orientation; represents a waste of talent and a denial of opportunity for self-fulfilment.

Furthermore, we recognise the following as protected characteristics in the work of the Council; carers; care experience; and socio-economic background (includes low income groups and the digitally excluded). We expect commitment and involvement from all our staff, partners and providers of goods and services in working towards the achievement of our vision.

## ANNEX A

### **Inclusion**

*Inclusion* in a workplace context is about workplace experiences and the degree to which employers involve and embrace all employees, recognise that their diversity adds to value to the council, its service users, communities, external stakeholders and create more innovative solutions and meaningful contributions. National and international evidence illustrates that inclusive cultures lead to diverse workplaces.

Wider than the workplace, inclusion is ensuring our citizens, service users and staff feel a sense of belonging, respected and valued for who they are. Inclusion is ensuring everyone has a voice and can be at their best.

### **Merit and positive action**

We will endeavour to achieve all of this through *positive action* to promote inclusion. There is an important distinction between positive action and positive discrimination. Positive action is lawful and aims to address disadvantages by encouraging participation and removing barriers. Positive discrimination is unlawful and involves giving preferential treatment based solely on protected characteristics.

We will always recruit or promote the best person for the job, positive action is not about preferential treatment, it aims to ensure that all candidates have an equal opportunity to be considered.

### **Intersectionality**

*Intersectionality* is about how multiple categories of identity or the intersection of several characteristics, can shape our experiences and lead to distinct forms of discrimination or disadvantage.

This also highlights the risk of too much emphasis on categorising people by protected characteristics, can lead to groups feeling their challenges are being overlooked. There is a further risk of alienating people who don't feel they fit into any particular category. Our strategy focuses on the importance of the universal issues of dignity and respect.

## ANNEX A

**Current state of play**

CYC workforce diversity breakdown – from CYC Workforce Profile  
30/09/2024

Characteristic	York population	CYC
Disabled	17%	8%
Male / Female	48% / 52%	37% / 63%
Gender reassignment or Trans/non-binary	1%	>less than 10
Black, Asian, Ethnic Minority <sup>1</sup>	13%	7%
Has religion/belief	47%	39.5%
Heterosexual / Non Heterosexual	86.5% / 5.5%	95% / 5%

**What the public say**

Our recent public consultation revealed a wide range of opinions and experiences about equity, diversity and inclusion. These are some quotes from members of the public:

*‘I have had mixed raced friends and those from minority groups made to feel discriminated by council employees who have demonstrated ignorance of their cultures/lived experiences’.*

*‘I recently had a really positive experience in dealing with the housing service - applying for the council housing list. I explained that I had autism and member of staff actually anticipated correctly the*

<sup>1</sup> Some organisations record minorities in a much more restrictive way, focusing only on visible minorities. It is also known that the census and other counts substantially undercount certain minorities, including some South Asian minorities and Travellers, for example, because of non-response for various reasons.

## ANNEX A

*reasonable adjustments I would need to for this meeting – i.e. in person, in a quiet room, their emails set out clearly in different sections. I had no feelings of distress’.*

*‘I’ve loved living in York because it’s peaceful...When it comes to making choice...You don’t have a black Barber in York and it’s really hard for someone that doesn’t understand the texture of my hair to barb my hair...And there are no African restaurants in York, I always have to cook for myself or go to Leeds or Manchester’.*

## 2. Equality Act 2010 and the Public Sector Equality Duty

The Equality Act 2010 brings all existing discrimination laws together into one piece of legislation that addresses employment, provision of goods and services, and property.

The Equality Act 2010 created nine **protected characteristics**\* which are: age; disability; gender reassignment; marriage and civil partnership; pregnancy and maternity; race; religion or belief; sex; and sexual orientation.

The Act also created a number of **prohibited conducts** in relation to people with a protected characteristic, these are: discrimination; (failing) the duty to make adjustments for disabled people; harassment; and victimisation.

The **Public Sector Equality Duty (PSED)** consists of two parts, which the council must meet when carrying out its functions:

### **(1) The General Duty (section 149 of the Equality Act 2010) requires the council to have due regard to the need to:**

- eliminate discrimination
- advance equality of opportunity
- foster good relations between different communities

**To advance equality of opportunity, the council must have due regard to the need to:**



## ANNEX A

removing or minimising disadvantages suffered by people due to their protected characteristics

- taking steps to meet the needs of people with certain protected characteristics where these are different from the needs of other people
- encouraging people with certain protected characteristics to participate in public life or in other activities where their participation is disproportionately low.

This includes treating some people more favourably than others in order to redress existing inequality and taking into account the needs of disabled people\*\*.

\*These protected characteristics are explained in more detail on the City of York council's website: [Equality Act 2010 – City of York Council](#)

\*\* Marriage and civil partnership and pregnancy and maternity only apply to the first aims of the general duty, not to the other aims (i.e. “advancing equality of opportunity” and “good relations”)

**(2) The Specific Duties, set out below, are legal requirements designed to help the council meet the general duties of the PSED.**

**They are:**

- Publishing equality information on its workforce and service in an accessible way annually thereafter.
- Publishing its own equality objectives. These objectives must be based on equality evidence and analysis, they must be specific and measurable and be reviewed and revised at least every four years.

**Scope:**

The scope of this strategy and action plan incorporates other policy developments and commitments such as:

- The Social Model of Disability
- Anti-Racism Strategy and Action Plan (City and Council)

## ANNEX A

- Gypsy and Traveller Action Plan

### **Human Rights Act (1998)**

The Human Rights Act 1998 sets out the fundamental rights and freedoms that everyone in the UK is entitled to. It incorporates the rights set out in the European Convention on Human Rights (ECHR) into domestic British law. The Human Rights Act came into force in the UK in October 2000.

It requires all public bodies (like courts, police, local authorities, hospitals and publicly funded schools) and other bodies carrying out public functions to respect and protect your human rights.

### **3. Our Equity, Diversity & Inclusion Promise and Commitment**

We believe that equity is essential to building strong cohesive communities. A truly inclusive city benefits all. Our promise is to ensure that EDI is an essential ingredient in becoming a vibrant community. The challenge for our EDI Strategy is to be able to live up to and embrace the commitments made in our Council Plan 2023 – 2027 ‘One City for All’

Our Council Plan commits us to demonstrate both equity and equality to all York’s, citizens, service users, our staff and the people who visit us.

City of York Council promises to:

- value diversity in our communities;
- promote an equitable, inclusive and engaged society;
- take a zero tolerance stance on intolerance, discrimination, harassment and victimisation in all of its forms

### **4. What we will do**

**This strategy pledges us to:**

## ANNEX A

### **1. Develop and promote anti-discrimination policies and practices at all levels of the council, and, in the delivery of our services to the public.**

This means:

- Our employment policies and practices are fit for purpose and up to date in order to effectively tackle issues. This includes those dealing with recruitment, promotion, training, grievance, discipline and retention.
- We improve the representation of people with protected characteristics at all levels of the council so that our workforce better reflects York's diversity
- Using the data we have on our diverse communities to inform policy and practice
- Engaging with diverse communities to co-develop policy and practice
- We take positive action to prevent harassment and victimisation of citizens, service users and employees

### **2. Ensuring best practice in equity, diversity and inclusion at corporate, service and individual levels throughout the council.**

This means:

- Services are truly accessible, welcoming, culturally sensitive and responsive to the needs of our diverse city and communities.
- Services are co-designed with diverse communities and incorporate lived experience to manage diversity effectively by tackling inequality and social exclusion.
- We promote diversity and fight intolerance through our work with all our partners, across public, private and third sectors, locally and regionally
- Ensure there is no discrimination in the distribution of grants and other resources to reflect the diverse needs within the city

## ANNEX A

### **3. Launch our unique process of conducting human rights and equity impact analysis, across all service areas as an integral part of decision-making processes.**

This means:

- We engage in effective equality analysis of policies and procedures impacting staff and citizens, making them fit for purpose
- We widen this analysis to include human rights and embed it at the start of all decision-making processes.

### **4. Provide training and support for staff and members to help them to meet their duties under the Equality Act and ensure citizens of York are treated with dignity and respect.**

This means:

- We ensure that we enable people and communities to fully participate in consultations over the planning and delivery of council services that affect them.
- We are providing support and training to ensure this strategy is implemented and makes a difference
- We report on progress of this strategy, meeting the duties under Equality Act (2010) and ensuring citizens are treated with dignity and respect

### **5. Implement our Equity, Diversity & Inclusion Action Plan and ensure we are leading edge as an inclusive employer and service provider**

This means:

- We effectively monitor, and report on, how well we are achieving our goals to eradicate discrimination, hate crime and anti-social behaviour from York
- We work with our partners to pursue agreed EDI objectives across the public, voluntary and business sectors of York.

## ANNEX A

- We conduct regular and effective monitoring of this strategy, action plan and Key Performance Indicators so that we demonstrate how we are making a difference

## 5. Responsibilities

The Executive has collective councillor responsibility for the delivery of the EDI Strategy. Each Executive Member also has responsibility for reviewing and evaluating equalities as appropriate for their portfolio area.

The Human Rights and Equalities Board alongside our Scrutiny Committees will be able to scrutinise the delivery of the plan.

We will secure a mechanism by which citizen and stakeholder voices can be heard to feed into the development of policies and strategies, with consideration of their rights through Human Rights and Equity Analysis tool.

The Chief Operating Officer will take the lead responsibility for the overall management of the Equity, Diversity & Inclusion Strategy and Chair the Council's Corporate Equity, Diversity & Inclusion Group.

Directors and Heads of Service are expected to demonstrate commitment to ensuring that the EDI Strategy is implemented at every level of the organisation.

- All members of staff are required to support the EDI strategy, policies, initiatives and ensure that members of the public, service users or employees are not discriminated against on the grounds of their age; disability; sex; gender reassignment; marriage and civil partnership status; pregnancy and maternity; race; religion or belief; or sexual orientation; carers; care experience and socio-economic background (includes low income groups and the digitally excluded).

## ANNEX A

### **Monitoring and Evaluating the Strategy & Plan.**

#### **We will publish an annual report which will:**

- Report on completion of actions, outcomes and related key performance measures;
- Update the action plan; and
- Update this strategy in response to any changes in the council and city's strategic and policy framework.

### **What does success look like?**

In taking the actions and meeting our obligations which are set out below, we will expect to achieve a number of outcomes which show real improvements over a period of time.

#### **These are:**

- A workforce that better represents the communities in York, and an improved employee profile at all levels of the organisation.
- Better access to services and more accessible services.
- A caring and responsive council which meets the needs of all members of the community
- Increased customer satisfaction across all areas.
- Improved service provision which reflects the needs of the people of York.
- Meet their duties under the Equality Act of 2010, raise awareness of this strategy and ensure citizens of the City are treated with dignity and respect as we deliver services.

More details on how we will measure the impact of our services, functions and policies is available in the Appendix.

---

## ANNEX A

**Appendix****Measuring the impact of our services, functions and policies**

We will undertake impact analysis across all our key functions in relation to all protected characteristics using our Human Rights and Equity Analysis Tool.

**We will:**

- Establish clear aims and objectives for the policy to be assessed.
- Consider available qualitative and quantitative data.
- Assess how each option being considered will directly or indirectly impact on our communities.
- Consult data and feedback from relevant stakeholders which will primarily include service users, voluntary and community organisations, staff members and their associations and trade unions.
- Monitor and review the changes made to the policy or service.
- Publish the results of the Human Rights and Equity Analysis.

We will ensure that our service plans address issues in a tangible manner that is open to inspection. We will follow the principles of:

- Challenge – whether the service meets the needs of all sections of the community.
- Compare – how well our services are performing from the point of view of all groups, against other service providers.
- Consult – effectively over services and ensuring that we include all hard to reach groups and carry out the consultation in a non-discriminatory and inclusive manner.
- Compete – Ensure that service providers conduct equity analysis and set equity objectives effectively.

This page is intentionally left blank



City of York Council  
Equalities Impact Assessment

Who is submitting the proposal?

<b>Directorate:</b>		Housing and Communities Directorate	
<b>Service Area:</b>		Customer, Communities and Inclusion	
<b>Name of the proposal:</b>		Equity, Diversity and Inclusion Strategy	
<b>Lead officer:</b>		Laura Williams and Laura Swiszczowski	
<b>Date assessment completed:</b>		20/04/2025	
<b>Names of those who contributed to the assessment:</b>			
<b>Name</b>	<b>Job title</b>	<b>Organisation</b>	<b>Area of expertise</b>
Laura Williams	Assistant Director Customer, Communities and Inclusion	City of York Council	Equity, Diversity and Inclusion and Human Rights
Laura Swiszczowski	Head of Equity, Diversity and Inclusion		

## Step 1 – Aims and intended outcomes

1.1	<b>What is the purpose of the proposal?</b> Please explain your proposal in Plain English avoiding acronyms and jargon.
	<p>This is the final version of an Equity, Diversity and Inclusion Strategy and associated annual action plan. As a core commitment within our Council Plan, we are ambitious for, and committed to, achieving continuous improvement and equity across all our services and functions.</p> <p>We aim to deliver services that are equally accessible to all our customers and to implement robust strategies and policies that are person centred and considerate of needs. As an employer we want to ensure equity in the recruitment, training and promotion of our employees. We also want celebrate diversity within the workplace and our city, encourage our employees to embrace continuous learning and development in all aspects of their role as officers and as individuals supporting our communities. Our Equity, Diversity &amp; Inclusion strategy will ensure we deliver on our commitments and drive change at all levels of the Council.</p> <p>The strategy builds on the city's designation and partnership working with regard to City of Sanctuary, Human Rights City and pledge to be an Anti-Racist City and recognised growing cross partnership strengths in these areas.</p>

1.2	<b>Are there any external considerations?</b> (Legislation/government directive/codes of practice etc.)
	<ul style="list-style-type: none"> <li>• The Council needs to take into account the <a href="#">Public Sector Equality Duty</a> under Section 149 of the Equality Act 2010 (to have due regard to the need to eliminate discrimination, harassment, victimisation and any other prohibited conduct; advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it and foster good relations between persons who share a relevant protected characteristic and persons who do not share it in the exercise of a public authority's functions).</li> <li>• Under the <a href="#">Human Rights Act 1998</a> it is unlawful for a public authority to act in a way which is incompatible with the rights set out in the Convention for the Protection of Human Rights and Fundamental Freedoms, agreed by the Council of Europe at Rome on 4th November 1950 ("the Convention"). In particular, the enjoyment of the rights and freedoms set out in the Convention must be secured without discrimination on any ground such as sex, race, colour, language, religion, political or other opinion, national or social origin, association with a national minority, property, birth or other status.</li> <li>• The report gives an update on how the council is seeking to meet its obligations under both the Equalities and Human Rights Acts with regard to all people protected under those Acts.</li> <li>• CYC is also working towards securing 'excellent' against the <a href="#">Equality Framework for Local Government   Local Government Association</a></li> </ul>
1.3	<b>Who are the stakeholders and what are their interests?</b>
	<b>Stakeholders:</b> Internal CYC teams, trade unions, civil society organisations, universities, VCS partners and community groups, all York citizens and in particular those with protected characteristics.

1.4	<p><b>What results/outcomes do we want to achieve and for whom?</b> This section should explain what outcomes you want to achieve for service users, staff and/or the wider community. Demonstrate how the proposal links to the Council Plan (2023- 2027) and other corporate strategies and plans.</p> <p>This work sits alongside other recent areas of development and action including re-establishment of the Human Rights &amp; Equalities Board, the council's adoption of the Social Model of Disability and its Anti-Racism Action Plan and Gypsy and Traveller Action Plan. It builds on the city's designation and partnership working with regard to City of Sanctuary, York Human Rights City and the pledge to be an Anti-Racist City and recognised growing cross partnership strengths in these areas.</p> <p>The successful implementation of this strategy would enable the Council to address the Plan's four key commitments in the following ways:</p> <p>a) <b>Equalities &amp; Human Rights</b> – this report is fully focussed on meeting this core commitment.</p> <p>b) <b>Affordability</b> – inequity and exclusion can impact on access to jobs, skills development and economic opportunity and so any improvements made will have direct benefits of the financial and economic wellbeing of the community.</p> <p>c) <b>Climate &amp; Environment</b>– there are no likely direct impacts on the Environment of this report although celebration of diverse cultures will bring a positive contribution to our community places and spaces.</p>
-----	--

	d) <b>Health</b> – there are known health disparities for people from all groups with protected characteristics, both nationally and as seen in data on the health of people in York, and any improvement in opportunity impacting on health and wellbeing will have a positive impact on communities.
--	--

**Step 2 – Gathering the information and feedback**

2.1	<b>What sources of data, evidence and consultation feedback do we have to help us understand the impact of the proposal on equality rights and human rights?</b> Please consider a range of sources, including: consultation exercises, surveys, feedback from staff, stakeholders, participants, research reports, the views of equality groups, as well your own experience of working in this area etc.
	Feedback from an 8 week public consultation is included at Annex A to the main report. This was used to amend the draft strategy considered at Executive in April 2024.

### Step 3 – Gaps in data and knowledge

3.1	What are the main gaps in information and understanding of the impact of your proposal? Please indicate how any gaps will be dealt with.	
Gaps in data or knowledge		Action to deal with this
We try to ensure consistent protected characteristic data across all service areas, but for some groups such as Gypsy and Traveller communities, the Trans* community, etc engagement could be improved.		
A significant proportion of staff and service users select 'prefer not to say' and work needs to be done to reduce this, ensuring confidence to declare protected characteristic data. This will be dealt with via training for Human Rights & Equity Champions who will be responsible for educating colleagues on the confidentiality of protected characteristic data, how this data is used and what it is used for, to encourage increased confidence talking about protected characteristic data and higher declaration from staff and service users.		

### Step 4 – Analysing the impacts or effects.

4.1	<b>Please consider what the evidence tells you about the likely impact (positive or negative) on people sharing a protected characteristic, i.e. how significant could the impacts be if we did not make any adjustments?</b> Remember the duty is also positive – so please identify where the proposal offers opportunities to promote equality and/or foster good relations.		
<b>Equality Groups and Human Rights.</b>	<b>Key Findings/Impacts</b>	<b>Positive (+) Negative (-) Neutral (0)</b>	<b>High (H) Medium (M) Low (L)</b>
<b>Age</b>	The EDI Strategy is expected to have a positive impact across all protected characteristics. We have used quantitative and qualitative data, including the results of the	<b>Positive (+)</b>	<b>High</b>

	public consultation to inform the Strategy's development. Where necessary we have developed target interventions for protected characteristics and have considered intersections of protected characteristics throughout.		
<b>Disability</b>		<b>Positive (+)</b>	
<b>Gender</b>		<b>Positive</b>	
<b>Gender Reassignment</b>		<b>Positive</b>	
<b>Pregnancy and maternity</b>		<b>Positive</b>	
<b>Race</b>		<b>Positive</b>	
<b>Religion and belief</b>		<b>Positive</b>	
<b>Sexual orientation</b>		<b>Positive</b>	
<b>Children with experience of care</b>		<b>Positive</b>	
<b>Other Socio-economic groups including :</b>	<b>Could other socio-economic groups be affected e.g. carers, ex-offenders, low incomes?</b>		
<b>Carer</b>		<b>Positive</b>	

<b>Low income groups</b>		<b>Positive</b>	
<b>Veterans, Armed Forces Community</b>	.	<b>Positive</b>	
<b>Other</b>			
<b>Impact on human rights:</b>			
List any human rights impacted.	<p>The new Human Rights and Equalities Analysis Tool which is included in the annual action plan will take into consideration human rights impacts of any changes to policy, practice or and service delivery alongside equalities impacts. HREB will be monitoring the quality of these once they are rolled out and start to be completed by service areas.</p> <p>The City of York Council and the York Human Rights City Steering Group established the Human Rights and Equalities Board with a remit to:</p> <ul style="list-style-type: none"> <li>• provide strategic direction for the council's human rights and equalities work</li> <li>• tackle the issues raised within the York Human Rights City Indicator Report</li> </ul>	<b>Positive (+)</b>	



**Use the following guidance to inform your responses:**

Indicate:

- Where you think that the proposal could have a POSITIVE impact on any of the equality groups like promoting equality and equal opportunities or improving relations within equality groups
- Where you think that the proposal could have a NEGATIVE impact on any of the equality groups, i.e. it could disadvantage them
- Where you think that this proposal has a NEUTRAL effect on any of the equality groups listed below i.e. it has no effect currently on equality groups.

It is important to remember that a proposal may be highly relevant to one aspect of equality and not relevant to another.

<p><b>High impact</b> (The proposal or process is very equality relevant)</p>	<p>There is significant potential for or evidence of adverse impact The proposal is institution wide or public facing The proposal has consequences for or affects significant numbers of people The proposal has the potential to make a significant contribution to promoting equality and the exercise of human rights.</p>
<p><b>Medium impact</b> (The proposal or process is somewhat equality relevant)</p>	<p>There is some evidence to suggest potential for or evidence of adverse impact The proposal is institution wide or across services, but mainly internal The proposal has consequences for or affects some people The proposal has the potential to make a contribution to promoting equality and the exercise of human rights</p>
<p><b>Low impact</b> (The proposal or process might be equality relevant)</p>	<p>There is little evidence to suggest that the proposal could result in adverse impact The proposal operates in a limited way The proposal has consequences for or affects few people The proposal may have the potential to contribute to promoting equality and the exercise of human rights</p>

## Step 5 - Mitigating adverse impacts and maximising positive impacts

5.1	Based on your findings, explain ways you plan to mitigate any unlawful prohibited conduct or unwanted adverse impact. Where positive impacts have been identified, what is been done to optimise opportunities to advance equality or foster good relations?
There is no indication that there is potential for negative impacts on the above groups.	

## Step 6 – Recommendations and conclusions of the assessment

6.1	Having considered the potential or actual impacts you should be in a position to make an informed judgement on what should be done. In all cases, document your reasoning that justifies your decision. There are four main options you can take:
<ul style="list-style-type: none"><li>- <b>No major change to the proposal</b> – the EIA demonstrates the proposal is robust. There is no potential for unlawful discrimination or adverse impact and you have taken all opportunities to advance equality and foster good relations, subject to continuing monitor and review.</li></ul>	

- **Adjust the proposal** – the EIA identifies potential problems or missed opportunities. This involves taking steps to remove any barriers, to better advance quality or to foster good relations.
- **Continue with the proposal** (despite the potential for adverse impact) – you should clearly set out the justifications for doing this and how you believe the decision is compatible with our obligations under the duty
- **Stop and remove the proposal** – if there are adverse effects that are not justified and cannot be mitigated, you should consider stopping the proposal altogether. If a proposal leads to unlawful discrimination, it should be removed or changed.

**Important:** If there are any adverse impacts you cannot mitigate, please provide a compelling reason in the justification column.

Option selected	Conclusions/justification
<b>No major change to the proposal</b>	No potential negative impacts that would require a major change.

## Step 7 – Summary of agreed actions resulting from the assessment

<b>7.1</b>	<b>What action, by whom, will be undertaken as a result of the impact assessment.</b>		
<b>Impact/issue</b>	<b>Action to be taken</b>	<b>Person responsible</b>	<b>Timescale</b>

<b>8. 1</b>	<b>How will the impact of your proposal be monitored and improved upon going forward?</b> Consider how will you identify the impact of activities on protected characteristics and other marginalised groups going forward? How will any learning and enhancements be capitalised on and embedded?		
	An annual report on progress against this strategy and action plan will be considered at a public meeting of the Human Rights and Equalities Board.		

## Step 8 - Monitor, review and improve

This page is intentionally left blank



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15/07/2025
<b>Report of:</b>	Pauline Stuchfield - Director of Housing & Communities
<b>Portfolio of:</b>	Cllr Pete Kilbane – Executive Member for Economy and Culture

## **Decision Report: Update on Future Libraries Investment Programme (FLIP)**

### **Subject of Report**

1. This report provides an update to Executive on the Future Libraries Investment Programme (“Programme”), including -
  - a) Success of the investment programme so far in the delivery of Haxby & Wigginton Library and Clifton Library Learning Centre (Annex A)
  - b) Proposals for the enhancements to Acomb Library based on public feedback (Annex B)
  - c) Budget for the Acomb library enhancements, noting the external funding from Arts Council (Library Investment Fund), Mayoral Renewables Fund and timetable for delivery.
2. To enable the Executive to approve the final stage of the FLIP delivery programme and to ensure Acomb library is updated in line with users’ feedback.

### **Benefits and Challenges**

3. The benefits of approving the enhancements at Acomb library include delivering on the successful £250,000 Arts Council grant as part of the Libraries Investment Fund (LIF) and to improve the look and feel of the internal layout by providing:
  - a) investment in new furniture and shelving to create a larger children’s library:

- b) a better layout for the indoor café area, increasing capacity where possible and improve accessibility:
  - c) quiet spaces for work and study:
  - d) improved toilet facilities including an additional accessible toilet:
  - e) a larger area for books:
  - f) improved meeting rooms including a refurbished and improved IT suite:
  - g) flexible shelving on wheels for onsite performances both inside and outside of library opening hours, and
  - h) improved lighting, audio-visual/PA and blackout blinds.
4. The grant has been successful, due to the key focus of delivering what the public want from their local library, based on the public consultation feedback undertaken in 2023.
  5. The refurbishment of the Acomb Library represents a significant and positive development for both Westfield and the wider Acomb ward. As a key community asset located in one of the more deprived areas, the library plays a vital role in supporting residents across all age groups.
  6. Improving the library facilities will deliver a range of long-term benefits for local schools and educational providers via a modernised library offering a valuable space for learning.
  7. The refurbishment will also contribute to reducing social isolation, particularly among older residents and those with limited mobility, by creating a welcoming and inclusive space for social interaction, community-led events, and support services.
  8. Furthermore, the upgraded library will serve as a hub for local organisations and community groups, enabling them to run activities, workshops, and outreach programmes that address local needs.
  9. Not going ahead with the project would mean having to return the grant and not following through with the consultation feedback from residents.



## Policy Basis for Decision

10. Libraries are part of the Council's statutory service and improvements to the properties remain the Council's responsibility under the operational contract with Explore York (Explore Libraries and Archive Mutual Ltd).
11. The FLIP programme supports the Council's four key pledges:
  - a) **Affordability** – Libraries play a key role in providing quality advice and information, to support residents needing help or just a safe place to visit.
  - b) **Environment** – Solar panels and some LED lights are being installed to improve the energy efficiency of the building.
  - c) **Equalities and Human Rights** – An access audit was carried out to understand how accessibility could be improved and improvements have been included based on specialist advice and guidance.
  - d) **Health Inequalities** - Explore will be able to enhance their programme of activities to promote this agenda working with relevant agencies.

## Financial Strategy Implications

12. The original capital budget of £7.701m approved by Executive on 13 January 2022 indicated an estimate allowance for Acomb library enhancements of £500k. This was based on the principle that the delivery of Haxby & Wigginton Library and Clifton Library were delivered in priority order with Acomb being the final project.
13. After delivering the two new libraries this has left a remaining budget of £100,000, plus project management resource time. In addition, the Council has been successful in securing an Arts Council Libraries Investment Fund of £250,000 and a £26,000 grant from the Mayoral Renewables Fund for renewable energy generation projects (Increases to £40,000, with £14,000 match funding from the Council's Climate Change budget), which increases the total project budget to **£390,000**.
14. The Arts Council, Library Investment Fund does come with grant conditions, but the application was based on delivering the feedback from local resident's needs, which was an important factor in being successful, as we could show significant public and

user engagement to really understand demands for the service provision.

15. The £26,000 renewable energy grant from the Mayoral Renewables Fund also has separate conditions and a delivery deadline of 31 March 2026.

## **Recommendation and Reasons**

16. The Executive is asked to approve the following officer recommendations –
  - a) Note the progress on the FLIP Programme to date.
  - b) Approve the Acomb library delivery budget of £390,000 including the external grants.
  - c) To delegate to the Director of Housing and Communities, in consultation with the Director of Governance and Head of Procurement, the authority to take such steps as are necessary to enter into the grant agreement with Explore York.
  - d) Approve the procurement of the works contracts to deliver the enhancements for Acomb Library and delegate authority to the Director of Housing and Communities, in consultation with the Director of Governance and Head of Procurement, to take such steps as are necessary to procure, award and enter into the resulting contracts.
  - e) To note the delivery timetable deadline for external grant bodies as 31 March 2026.

## **Background and success so far**

17. In January 2022, the Executive approved a £7.701m Future Library Investment Programme (FLIP), to deliver three projects in order. First a new library for Haxby & Wigginton, second a new library learning centre in Clifton and finally an enhancement to Acomb library. See Annex A for a summary report on the positive impacts the investment has made.
18. Acomb was the very first Library Learning Centre, opened in 2007 after a £500k investment to include a café and create new flexible spaces, therefore it already has the core library vision at its heart. The ongoing success of the café has allowed Explore York the

income generation to contribute to their events schedule and programme of activities which benefit the local community.

19. Acomb library had also benefitted from over £110k investment on replacing a large part of the main roof and green credentials such as the wood pellet boiler.
20. The potential to develop and improve the current building to further enhance the offer to local residents was noted in the original report but committed to engaging with local residents, seeking their views and ambitions to influence the next stages of its development.

## **Consultation Analysis**

21. The public consultation for Acomb Explore Library Learning Centre was carried out in 2023, led by Explore.
22. The survey was completed by 234 people and Explore asked people to tell them what they loved about their library and what they would like to see more of. They also asked what does not work so well and what is not important to users. The top three priorities were:
  - a) Bigger children's space
  - b) More indoor café space
  - c) Quiet space for work or study
23. Responses also told us residents wanted to see more space for books, a covered area outside for events such as craft fairs and, on a more practical note, extra toilets. People were not so interested in lighting and signage improvements, touch-down office space or better cycle parking.
24. A summary of the survey results was published on the Explore website in April 2023 and remains on the website for people to review.

## **Options Analysis and Evidential Basis**

25. The options available to members are:
  - Option A – To progress with the enhancement of Acomb Library
  - Option B – To not progress

26. Option A (Recommended option) – The future library investment programme has been very successful in updating and delivering benefits for local residents and all who use the libraries. The significant external grants have enabled the Council to plan to deliver on the feedback of the consultation, listening and responding to people's views and needs.
27. Option B – This option is possible but would require the Council to return grants to both the Arts Council and Mayoral Renewables Fund, with reputational risk for future funding bids. In addition, Acomb was the first Explore library in 2007 and needs refurbishment and improvement to accessibility in certain areas. This could start to have an impact on visitor numbers due to the declining condition of the library.

## **Organisational Impact and Implications**

28. Financial – The budget available for the final stage of the FLIP project to enhance Acomb library is shown in table 1 and the proposed expenditure in Table 2. Table 2 also shows which expenditure lines will be granted to and procured by Explore York.

**Table 1:**

<b>Budget</b>	<b>£</b>
CYC Capital	£100,000
Arts Council Funding from Library Investment Fund	£250,000
Mayoral Renewables Fund (Includes £14k from CYC Climate Change Budget as match funding)	£40,000
<b>Total Budget</b>	<b>£390,000</b>

**Table 2:**

<b>Expenditure</b>	<b>£</b>	<b>Expenditure by</b>
Professional Fees and Services	£26,500	CYC
Building Contract – Works	£140,000	Explore
Specialist library furniture	£110,000	Explore
Audio-visual and ICT installations	£30,000	Explore
Kitchen fitout	£17,500	Explore
CYC direct works (Fire panel & drainage)	£10,000	CYC
Solar Panel install	£40,000	CYC
Loss of income to Explore for closure	£12,000	Explore
Contingency	£4,000	CYC
<b>Total</b>	<b>£390,000</b>	

29. Explore York is not currently eligible to recover VAT in relation to Acomb Library. This would mean the project costs for Acomb Library would need to be considered with VAT added which would equate to around £60,000. Having discussed this with the Explore York's Chief Finance Officer, it is confirmed that Explore York will investigate ways to enable them to recover VAT relating to Acomb library and liaise with the relevant authorities to do so. If successful, it will allow York Explore to claim back the VAT paid on refurbishment costs meaning that money can go towards further improvements. The costs shown in Table 2 are based on VAT recovery.
30. There are also revenue financial benefits for Explore following the Council's investment including lower utility costs due to the energy efficiency measures and improved income potential.
31. **Human Resources (HR)** – no implications.

32. **Legal** – The proposal is for Explore York to lead on the expenditure items as identified in table 2 above. A grant agreement between CYC and Explore York will be required to ensure the terms and conditions of the Arts Council and Mayoral Renewables Fund with CYC, are passed through to Explore York. This is to protect CYC should there be a failure to meet any of those terms and conditions by Explore York.
33. **Procurement** – The proposal to have a mixed procurement strategy between CYC and Explore York is acceptable based on the terms and conditions of the grant funders being passed through to Explore. For example, the Arts Council grant conditions have obligations for CYC to:
- a. Seek best value for money
  - b. Procurement process conducted in a transparent and proportionate manner
  - c. Obtain quotes or competitive tendering for purchasing goods or services cost more than £12,000.
  - d. Comply with Procurement Act 2023.
34. For any council funded works or services, these must be procured via a compliant, open, transparent, and fair process in accordance with the council's Contract Procedure Rules and where applicable, the Procurement Act 2023. Further advice regarding the procurement process and development of procurement strategies must be sought from the Commercial Procurement team.
35. **Health and Wellbeing** – Improved library services positively impact health and well-being by providing access to information, fostering social connection, and supporting mental health. Libraries offer resources for self-management of health conditions, reduce social isolation, and promote overall well-being. Therefore, Public Health are fully in support of the continued library improvement programme.
36. **Environment and Climate action** - The successful Mayoral Renewables Fund to add solar PV to Acomb Library is part of the Council's overall carbon reduction strategy. The improvements to LED lighting and Solar PV will assist in reducing emissions associated with libraries, which is currently 48.31 tCO<sub>2</sub>e per year.

- 37. **Affordability** – Libraries play a key role in providing quality and trusted advice, information and guidance which helps people access and navigate many support services.
- 38. **Equalities and Human Rights** – An Equalities Impact Assessment (EIA) has been carried out and can be seen at Annex C. The outcome of the EIA shows the proposed physical works to Acomb Library will positively affect people sharing a protected characteristic.
- 39. **Data Protection and Privacy** – The data protection impact assessment (DPIAs) screening questions were completed for the recommendations and options in this report and as there is no personal, special categories or criminal offence data being processed to set these out, there is no requirement to complete a DPIA at this time. However, this will be reviewed following the approved recommendations and options from this report and a DPIA completed if required.
- 40. **Communications** – Explore will lead but supported by CYC in the communications of the project and any closure of service.
- 41. **Economy** - no implications.

## **Risks and Mitigations**

- 42. There are two external grants associated with this project, which both have terms and conditions.
- 43. The LIF grant from Arts Council has a deadline for completion by 31 March 2026 and requirements to seek competitive tenders for all contracts in excess of £12,000 (excluding VAT) and show that we have selected the option which provides value for money. To mitigate this risk in any grant agreement with Explore the terms and conditions of the grant will be included.
- 44. The renewables energy grant from the Mayoral Renewables Fund has a delivery deadline of 31 March 2026, which is short but manageable due to the small scale of the solar installation and the initial feasibility already carried out. This is still dependant on a structural engineer's report on roof loading.

45. The timetable for delivery cannot be certain at this point, until a construction partner has been appointed to take on the works as there are a number of options to consider. The project team are working on the basis of a 12-week closure of the Acomb Library during Autumn/Winter 2025 and possibly into spring 2026, depending on the agreed start date of the selected contractor. The aim will be to look at options that minimises public disruption.

## Wards Impacted

46. Wards impacted by the Acomb Library enhancement works will be Acomb and Westfield mainly but noting that some users come from further afield.

## Contact details

For further information please contact the authors of this Decision Report.

### Author

<b>Name:</b>	Andrew Laslett
<b>Job Title:</b>	Strategic Services Manager
<b>Service Area:</b>	Communities
<b>Telephone:</b>	07850 001 002
<b>Report approved:</b>	Yes
<b>Date:</b>	03/07/2025

### Co-author

<b>Name:</b>	Sarah Knott
<b>Job Title:</b>	Programme Manager
<b>Service Area:</b>	Strategic Services
<b>Telephone:</b>	

## Background papers

Executive – Thursday 13 January 2022 – [Item 85 Future Libraries Investment Programme](#)



## **Annexes**

- Annex A: Success of Haxby & Wigginton Gateway Library and Clifton Library Learning Centre investments.
- Annex B: Proposed enhancements to Acomb Library
- Annex C: Equalities Impact Assessment (EIA)

This page is intentionally left blank



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15/07/2025
<b>Report of:</b>	Pauline Stuchfield - Director of Housing & Communities
<b>Portfolio of:</b>	Cllr Pete Kilbane – Executive Member for Economy and Culture

## Annex A

### Success of Haxby & Wigginton Gateway Library and Clifton Library Learning Centre investments.

**Haxby and Wigginton Gateway Library** opened its door in January 2023, co-located with Oaken Grove Community Centre.



Haxby and Wigginton Library closed under safety grounds in July 2016 and between August that year right through to opening on 2<sup>nd</sup> January 2023, operated variously from, a mobile library and one small room within Oaken Grove Community Centre. The capital investment enabled the securing of a permanent home for Haxby & Wigginton Library and a full library service for the community.

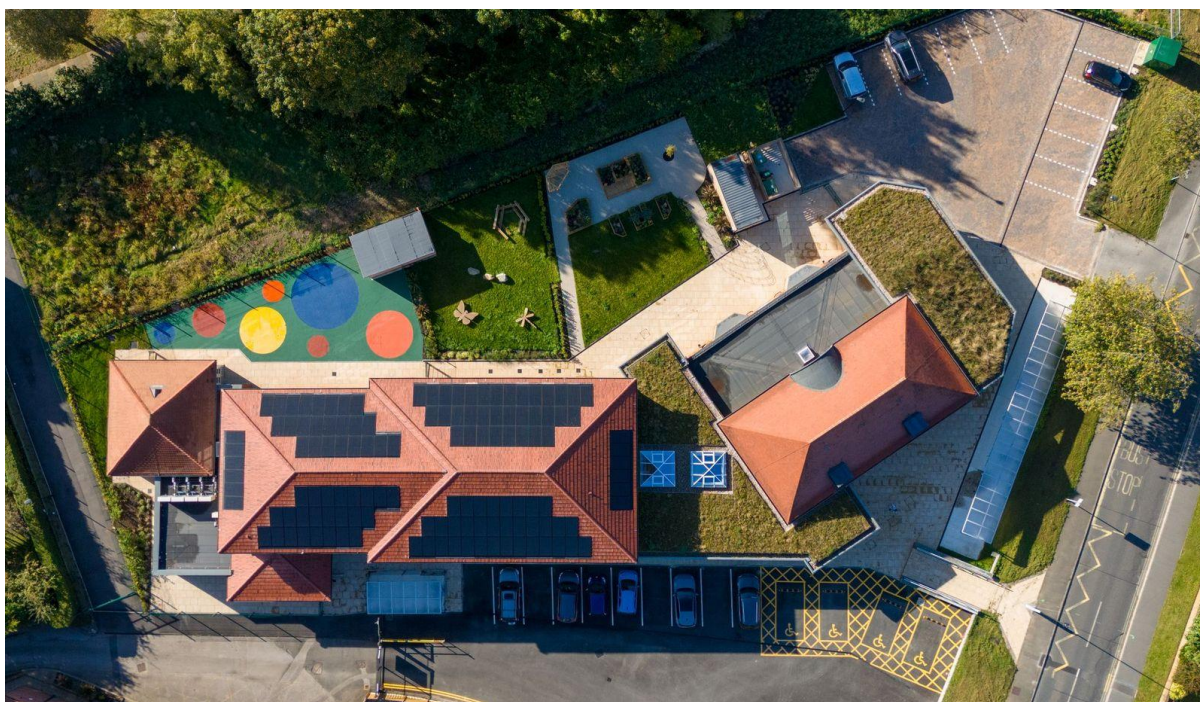
Since opening on 2<sup>nd</sup> January 2023, library usage has increased consistently over that period and far exceeds the visitor figures of the last full year of opening of the previous library. Total visits for performance year 2023/24 was 45,377, with 2024/25 increasing to 60,170. The last full year of opening of the old Haxby & Wigginton Library had 43,818 visits.

The reading café offer has greatly enhanced the offer to the community, as has the now embedded regular programme of events and activities including under 5s rhymetimes, readers groups, craft clubs and lego clubs. The programme of activity variously supports the improvement of early years literacy and provide a strong start for young babies, while craft clubs, readers groups and the café provide opportunities to bring the community together, tackling isolation. The programme of volunteering opportunities also enables improved wellbeing and resilience, with volunteers regularly in contact with other people within the local community, fostering stronger relationships. The partnership with Oaken Grove also improves the customer experience, with Explore being able to deliver more and bigger in larger spaces.

Shortly after opening, we conducted a survey of customers using the library. 99.1% satisfaction rate, compared to the previous survey in 2021 of 65%. Feedback from the community included comments such as the below:

*Excellent library, very helpful staff. It is vital for children to have access to free library facilities including the stimulating rhymetime. The library is a central community facility and should be supported and strengthened in every possible way. I firmly believe it plays an extremely positive role in supporting the mental health and welfare of all in the community, regardless of age.*

**Clifton Library Learning Centre** opened its doors in September 2024, relocated 5 minutes walk from the old Clifton library to Rawcliffe Drive, next to the Vale of York Academy School.



Similarly, the opening of Clifton Explore in September 2024 saw a strengthening and a further embedding of the Explore Centre as a key community anchor. Library use, book loans and volunteer support soared as we welcomed the community into the new centre. Again, visitor figures doubled from the previous Library to the new location with the opening first 10 days in September seeing more visits than a typical month in its previous location. Visitor figures Sept 24 -31<sup>st</sup> March 25 were 37,977, compared with 16,101 in the first 6 months of the same year, based in the previous Library. A reading café brought a new focus for the community and is now a meeting place for parents and children, particularly after storytimes, a space for the students from nearby Vale of York Academy school to do homework and a drop-in space for local microbusiness to access emails. A suite of meeting rooms has enabled the working with new partners, including Accessible Arts and Media, York Music Hub and Medical Needs Tuition Service, as well as a regular stream of bookings from organisation such as Andy's Mans Club. The Explore Centre has also been inundated with other partners including Yormind and HealthWatch who hold regular drop in sessions providing access to City Centre provision within the local community. As detailed above, Explore is supporting the development of stronger communities and improved life chances through opportunities to improve health and wellbeing and decrease the feeling of social isolation.

Comments and feedback from the local community include the following

*"Absolutely brilliant library. Library staff are very helpful and friendly. Food in the café is delicious. So very lucky to have this wonderful library here."*

*"Absolutely fantastic! What an upgrade. The space, choice of books and staff are all fantastic. Can't wait to come back. Thank you."*



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15/07/2025
<b>Report of:</b>	Pauline Stuchfield - Director of Housing & Communities
<b>Portfolio of:</b>	Cllr Pete Kilbane – Executive Member for Economy and Culture

## Annex B

### Proposed enhancements to Acomb Library

The overall budget for Acomb Library enhancements is £390k, made up of £100k of Council capital funding, £250k from Art Council's, Library Investment Fund and £40k from Mayoral Renewables Fund.

The £250k grant from the Art Council's, Library Investment Fund (LIF) was successful due to the strength of being able to demonstrate public consultation and a bid that responded to the user's feedback. In summary, our local community asked for:

- investing in new furniture and shelving to create a larger children's library,
- a larger indoor café area,
- an improved entrance,
- quiet spaces for work and study,
- improved toilet facilities including an additional accessible toilet,
- a larger area for books,
- improved meeting rooms including a refurbished and improved IT suite,
- a covered area for community outdoor events.
- flexible shelving on wheels for onsite performances both inside and outside of
- improved lighting, PA and blackout blinds.

The £40k from Mayoral Renewables Fund and CYC Climate change budget for solar PV, is based on a feasibility report (Dec 2024) by York Community Energy which demonstrates a 30kWp system, projected to generate 26.6MWh annually, which is estimated to support 59% of electricity consumed by the library site. This can be delivered as a separate piece of work as will require specialist supplier.

The priority of works must align to LIF funding requirements as the outputs are agreed in the bid. Table 1 below was included in the bid and shows the detail of each element:

Table 1: Outputs funded by LIF

<b>Furniture, fittings and equipment</b>
<b>Specialist Library Furniture for main library floor plate</b> - New furniture, fittings and flexible shelving throughout the library to create fun, accessible, quality comfortable spaces, a separate young persons area, shelving on wheels throughout, provision of quiet study zones including café seating.
<b>Fit out of 3 meeting rooms</b> - including presentation facilities (screens with appropriate connections for use with a variety of devices)
<b>Performance Space</b> - Tech and equipment to enable the delivery of high-quality cultural experiences improving the customer experience including black out blinds, adjustable lighting and spot lighting to create atmospheric performance spaces, flexible staging and a PA.
<b>Construction/building works</b>
<b>Toilet refurbishment</b> - including accessible toilet
<b>Internal redecoration</b> - floors, walls and ceilings where required
<b>New front patio</b> to increase café seating area
<b>Improvements to front entrance to reduce draft issues and access</b>
<b>LED lighting</b>
<b>Car park line marking of disabled bays &amp; spot repairs to ensure safe access</b>



In addition to the grant funded works, table 2 shows other work elements:

Table 2: Other outputs

<b>Renewable Energy</b>
<b>Solar panels</b> - New solar PV installation of a 30 kWp system.
<b>Fire Alarm System</b>
<b>Fire Panel</b> – the existing fire panel is at end of life and needs replacing
<b>Café Improvements</b>
<b>Kitchen</b> – Works are required to reshape the kitchen layout and update equipment
<b>Other</b>
<b>Drainage</b> – Problems with existing drains need to be investigated and resolved

### **Timetable:**

The timetable for delivery can not be certain at this point, until a construction partner has been appointed to take on the works as there are a number of options to consider. The project team are working on the basis of a 12-week closure of the Acomb Library during Autumn/Winter 2025 and possibly into spring 2026, depending on the agreed start date of the selected contractor. The aim will be to look at options that minimises public disruption.

The deadline for delivery for the solar panels and LIF outputs is 31 March 2026.

This page is intentionally left blank



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15/07/2025
<b>Report of:</b>	Pauline Stuchfield - Director of Housing & Communities
<b>Portfolio of:</b>	Cllr Pete Kilbane – Executive Member for Economy and Culture

## Annex C

### City of York Council Equalities Impact Assessment

#### Who is submitting the proposal?

<b>Directorate:</b>	Housing and Communities		
<b>Service Area:</b>	Customer and Communities		
<b>Name of the proposal:</b>	Future Libraries Investment Programme – Acomb Library Enhancements		
<b>Lead officer:</b>	Andrew Laslett – Strategic Services Manager		
<b>Date assessment completed:</b>	13/06/2025		
<b>Names of those who contributed to the assessment:</b>			
<b>Name</b>	<b>Job title</b>	<b>Organisation</b>	<b>Area of expertise</b>
Andrew Laslett	Strategic Services Manager	CYC	
Sarah Knott	Programme Manager	CYC	

**Step 1 - Aims and intended outcomes**

<b>1.1</b>	<b>What is the purpose of the proposal?</b> Please explain your proposal in Plain English avoiding acronyms and jargon.
	<p>This assessment covers the improvements due to be made to Acomb Library as part of the overall Future Libraries Investment Programme (FLIP) and to address some of the outputs of the York Acomb Library disability access audit which was conducted in August 2023. The improvements include structural build works and aesthetic enhancements consisting of furnishings as well as practical improvements to audio and visual kit.</p> <p>The proposal addresses feedback from a public survey conducted by Explore York and from an access audit carried out in 2023.</p>
<b>1.2</b>	<b>Are there any external considerations?</b> (Legislation/government directive/codes of practice etc.)
	<p>Yes. This project is subject to funding conditions from the Arts Council (Library Investment Fund) and the Mayoral Renewables Fund (Renewable energy project).</p> <p>City of York Council has a statutory duty under the Public Libraries and Museums Act 1964 'to provide a comprehensive and efficient library service for all persons' for all those who live, work or study in the area (section 7). In providing this service, councils must, among other things:</p> <p>Encourage both adults and children to make full use of the library services (Section 7(2)(b))</p> <p>Lend books and other printed materials free of charge for those who live, work or study in the area (in accordance with section 8 (3))</p> <p>City of York Council must also comply with other legal obligations including the Equality Act and Public Sector Equality Duty.</p>
<b>1.3</b>	<b>Who are the stakeholders and what are their interests?</b>
	Stakeholders include residents, Acomb and Westfield ward councillors, Explore York staff, Explore customers and funding

	bodies. Their interests range from ensuring that the Future Library Investment Funds are spent on improving some elements noted in the public feedback, the access audit and the Arts Council/ Mayoral Renewables Fund agreement. People will also be keen to understanding what disruption the works may cause so alternative service arrangements can be made during the closure period.
--	--

<b>1.4</b>	<b>What results/outcomes do we want to achieve and for whom?</b> This section should explain what outcomes you want to achieve for service users, staff and/or the wider community. Demonstrate how the proposal links to the Council Plan (2019-2023) and other corporate strategies and plans.
	<p>Outcomes include</p> <ol style="list-style-type: none"> <li>1. Investing in new furniture and shelving to create a larger children's library which can encourage engagement in learning and literacy from an early age. New furniture may be more accessible to children of all physical abilities and can support inclusive family use.</li> <li>2. A better layout for the indoor café area which could support equality for people with mobility impairments, visual impairments, older adults, and families. The Acomb café is well used and can get very busy so the improved layout will allow for easier navigation for wheelchair users and those with guide dogs or prams. We hope it will enhance social inclusion and provide a more welcoming and comfortable environment for all.</li> <li>3. Quiet spaces for work and study which will also support neurodivergent individuals, people with mental health conditions, students, and remote workers. A quiet space hopes to provide a calm environment for people who need low-stimulation areas to focus or who may find busy spaces overwhelming. Including a quiet space will also help address one of the environment recommendations in the access audit 2023.</li> <li>4. Improved toilet facilities including an additional accessible toilet which is much needed at this busy library and was a recommendation picked up on the disability access audit in 2023. The additional accessible toilet will support disabled people, older adults, and families with young children. The new facilities will support with increasing customers dignity,</li> </ol>

	<p>and comfort, particularly for those with mobility or continence issues. It will also reduce waiting times for accessible facilities at this well used library.</p> <p>5. Improved meeting rooms including a refurbished and improved IT suite which could support equality for job seekers, community groups, disabled users, and those experiencing digital exclusion and low income. The room improvements will enable inclusive community activities, workshops, and support groups which the library already provide well.</p> <p>6. Flexible shelving on wheels for onsite performances both inside and outside of library opening hours will allow the main library space to adapt for diverse community use (e.g. cultural events, disability support groups, youth programs). It will also improve physical accessibility by allowing space reconfiguration and encourage participation of people who originally may not engage with such events.</p> <p>7. Improved lighting, PA and blackout blinds will support library users by creating sensory-friendly environments. It will also go a long way to make presentations and events more inclusive through accessible audio-visual features.</p>
--	---

## Step 2 - Gathering the information and feedback

2.1	<p><b>What sources of data, evidence and consultation feedback do we have to help us understand the impact of the proposal on equality rights and human rights?</b> Please consider a range of sources, including: consultation exercises, surveys, feedback from staff, stakeholders, participants, research reports, the views of equality groups, as well your own experience of working in this area etc.</p>	
	<b>Source of data/supporting evidence</b>	<b>Reason for using</b>
	Public Consultation (2023) for Acomb Library Learning Centre. Explore led the survey and asked people to tell us what they liked and didn't like about the current service. It also allowed respondents to tell us their top	Listening to customers feedback is really important. The results offered representation of users with disabilities and accessibility needs.

three priorities for improving the library.	
Acomb Library Disability Access Audit 2023	A professional audit carried out by Access Included documenting a set of recommendations.
Analysis of key performance indicators that provides insights into which services are being used.	Indicators include: visits, active borrowers, use of computers, attendance at events.

### Step 3 – Gaps in data and knowledge

<b>3.1</b>	<b>What are the main gaps in information and understanding of the impact of your proposal? Please indicate how any gaps will be dealt with.</b>
<b>Gaps in data or knowledge</b>	<b>Action to deal with this</b>

### Step 4 - Analysing the impacts or effects.

<b>4.1</b>	<b>Please consider what the evidence tells you about the likely impact (positive or negative) on people sharing a protected characteristic, i.e., how significant could the impacts be if we did not make any adjustments? Remember the duty is also positive – so please identify where the proposal offers opportunities to promote equality and/or foster good relations.</b>		
<b>Equality Groups and Human Rights.</b>	<b>Key Findings/Impacts</b>	<b>Positive (+) Negative (-) Neutral (0)</b>	<b>High (H) Medium (M) Low (L)</b>
<b>Age</b>	A better layout for the indoor café area which could support equality for older people.	+	H
<b>Disability</b>	<ul style="list-style-type: none"> <li>• Accessible toilet</li> <li>• A better layout for the indoor café area which could support equality for people with mobility</li> </ul>	+	H

	impairments, visual impairments.		
<b>Gender</b>	Neutral impact expected; project benefits are universally accessible.	0	L
<b>Gender Reassignment</b>	No differential impact identified.	0	L
<b>Marriage and civil partnership</b>	No differential impact identified.	0	L
<b>Pregnancy and maternity</b>		+	M
<b>Race</b>	No evidence of differential impact, but further monitoring recommended.	0	M
<b>Religion and belief</b>	No differential impact identified.	0	L
<b>Sexual orientation</b>	No differential impact identified.	0	L
<b>Other Socio-economic groups including :</b>	<b>Could other socio-economic groups be affected e.g., carers, ex-offenders, low incomes?</b>		
<b>Carer</b>	Improved facilities to benefit carers supporting individuals with mobility issues.	+	M
<b>Low income groups</b>	Improved meeting rooms including a refurbished and improved IT suite which could support equality for job seekers, those experiencing digital exclusion and low income. Possible indirect benefit.	+	H
<b>Veterans, Armed Forces Community</b>	Neutral impact; potential for improved access to support services via better connectivity.	0	L
<b>Human Rights</b>	Projects promote the right to mobility, decent standard of living, and health by improving access and air quality.	+	H
<b>Other</b>			



<b>Impact on human rights:</b>			
List any human rights impacted.		0	L

**Use the following guidance to inform your responses:**

Indicate:

- Where you think that the proposal could have a **POSITIVE** impact on any of the equality groups like promoting equality and equal opportunities or improving relations within equality groups
- Where you think that the proposal could have a **NEGATIVE** impact on any of the equality groups, i.e., it could disadvantage them
- Where you think that this proposal has a **NEUTRAL** effect on any of the equality groups listed below i.e., it has no effect currently on equality groups.

It is important to remember that a proposal may be highly relevant to one aspect of equality and not relevant to another.

<b>High impact</b> (The proposal or process is very equality relevant)	<p>There is significant potential for or evidence of adverse impact</p> <p>The proposal is institution wide or public facing</p> <p>The proposal has consequences for or affects significant numbers of people</p> <p>The proposal has the potential to make a significant contribution to promoting equality and the exercise of human rights.</p>
<b>Medium impact</b> (The proposal or process is somewhat equality relevant)	<p>There is some evidence to suggest potential for or evidence of adverse impact</p> <p>The proposal is institution wide or across services, but mainly internal</p> <p>The proposal has consequences for or affects some people</p> <p>The proposal has the potential to make a contribution to promoting equality and the exercise of human rights</p>

<b>Low impact</b> (The proposal or process might be equality relevant)	There is little evidence to suggest that the proposal could result in adverse impact The proposal operates in a limited way The proposal has consequences for or affects few people The proposal may have the potential to contribute to promoting equality and the exercise of human rights
---	---

### Step 5 - Mitigating adverse impacts and maximising positive impacts

5.1	<b>Based on your findings, explain ways you plan to mitigate any unlawful prohibited conduct or unwanted adverse impact. Where positive impacts have been identified, what is been done to optimise opportunities to advance equality or foster good relations?</b>

### Step 6 - Recommendations and conclusions of the assessment

6.1	<b>Having considered the potential or actual impacts you should be in a position to make an informed judgement on what should be done. In all cases, document your reasoning that justifies your decision. There are four main options you can take:</b>
	<p><b>No major change to the proposal</b> – the EIA demonstrates the proposal is robust. There is no potential for unlawful discrimination or adverse impact and you have taken all opportunities to advance equality and foster good relations, subject to continuing monitor and review.</p> <p><b>Adjust the proposal</b> – the EIA identifies potential problems or missed opportunities. This involves taking steps to remove any barriers, to better advance quality or to foster good relations.</p> <p><b>Continue with the proposal</b> (despite the potential for adverse impact) – you should clearly set out the justifications for doing this and how you believe the decision is compatible with our obligations under the duty</p>

**Stop and remove the proposal** – if there are adverse effects that are not justified and cannot be mitigated, you should consider stopping the proposal altogether. If a proposal leads to unlawful discrimination, it should be removed or changed.

- **Important:** If there are any adverse impacts you cannot mitigate, please provide a compelling reason in the justification column.

Option selected	Conclusions/justification
<b>No major change to the proposal</b>	The Acomb Library enhancements collectively promote <b>physical accessibility, inclusive design, and equal participation</b> across age, disability, race, income level, and more. They help eliminate barriers, foster inclusion, and enhance equity in public service delivery.

## Step 7 - Summary of agreed actions resulting from the assessment

7.1	What action, by whom, will be undertaken as a result of the impact assessment.		
Impact/issue	Action to be taken	Person responsible	Timescale
Closure of library for up to 12 weeks	To communicate with library users early and seek to understand any additional needs to providing alternative provision of services that doesn't discriminate.	Acomb Explore Library Manager & Project Manager	2 months prior to closure

**Step 8 - Monitor, review and improve**

<b>8. 1</b>	<b>How will the impact of your proposal be monitored and improved upon going forward?</b> Consider how will you identify the impact of activities on protected characteristics and other marginalised groups going forward? How will any learning and enhancements be capitalised on and embedded?
	<ul style="list-style-type: none"><li>• The impact of the Acomb Library enhancement proposals will be monitored through regular project review meetings and formal monthly working group meetings between project officers and Explore staff.</li><li>• Equality metrics will be tracked, including accessibility audits, user satisfaction surveys, and consultation feedback analysis.</li><li>• Issues raised during construction works or post-implementation will be logged and addressed through established project governance.</li><li>• Learning will be documented and shared across council infrastructure programmes to ensure continuous improvement in inclusive planning and delivery.</li></ul>



<b>Meeting:</b>	Executive
<b>Meeting date:</b>	15/07/2025
<b>Report of:</b>	Patrick Looker – Assistant Director Finance
<b>Portfolio of:</b>	Executive Member for the Environment and Climate Emergency (Cllr J Kent)

## **Decision Report: £500k Parks Investment Fund**

### **Subject of Report**

1. At Budget Council in February 2025 £500k investment was approved into the Councils parks. The Executive is now being asked to approve the criteria together with a recommended weighting which will be used to shortlist investment projects.
2. This decision will allow officers to apply the criteria to a range of possible schemes and projects in the summer and to report back to the Executive in September where approval will be sought on which should proceed.

### **Benefits and Challenges**

3. This fund was established to improve our communities and ensure that residents can enjoy accessible parks, play areas and green spaces fit for all. The fund also aligns with our Pride in Place values and will support improvement of community wellbeing, encouraging more people of all ages and abilities to spend time outdoors.
4. This initiative marks the first major investment in York's public spaces in several years and is part of the strategic ambitions laid out in the Council Plan 2023–2027, with widespread resident support. A key focus is ensuring accessible and sustainable outdoor environments that enhance biodiversity, wellbeing, and social inclusion.

5. There are numerous benefits of investment into green spaces are best illustrated by The National Lottery Report *Space to Thrive* (2019). This was produced by researchers from Sheffield Hallam University and The University of Sheffield and identified
- *Physical health, mental wellbeing and life satisfaction are all enhanced through access to and use of parks and green spaces.*
  - *Parks create important opportunities for social integration.*
  - *Parks provide opportunities for community engagement and local residents value the chance to be involved in designing and improving their green spaces (e.g., through volunteering)*
  - *Parks and green spaces highlight inequalities in society.*
  - *There are economic benefits of parks and green spaces in terms of creating employment, hosting economic activities (such as cafes or events) and encouraging inward investment*

Full details can be found at

[https://www.heritagefund.org.uk/sites/default/files/media/attachments/Space%20to%20thrive\\_2019-A%20rapid%20evidence%20review%2014102019-a11y.pdf](https://www.heritagefund.org.uk/sites/default/files/media/attachments/Space%20to%20thrive_2019-A%20rapid%20evidence%20review%2014102019-a11y.pdf)

6. It is recognised that regular use of our green spaces is not consistent across York's communities. In selecting projects and designing schemes both users' and non-users' views will be sought to ensure best use is made of the investment, with the desired outcome that this programme of investment will seek to ensure our green spaces are inclusive and enjoyed by a wide variety of people.
7. In managing York's green spaces Public Realm work closely with the Environment and Community Officers, Friends Of and with many volunteer groups across the city. Several thousand hours of volunteer activity supplement the maintenance and upkeep of our green spaces. This investment will promote and encourage our communities to help with the ongoing and future involvement in York's green spaces.
8. The opportunity exists to link this programme to the work of the Public Health and Communities team. They will review the impact of a proposed scheme or project and seek to maximise its benefits. This could be through seeking additional community or 3<sup>rd</sup> party involvement in planting, future maintenance or contributing to cost, in cash or kind.

9. The biggest challenge that has been identified is that there is insufficient capacity within the current workforce to deliver this greatly expanded programme. To address this problem, work has started on the recruitment of a project officer who will be in place until 31<sup>st</sup> March 2027.

## Policy Basis for Decision

10. The prioritisation of investment based on the weighting supports two of the Council's Core commitments:

**Equalities and Human Rights-** Equality of opportunity. We will create opportunities for all, providing equal opportunity and balancing the human rights of everyone to ensure residents and visitors alike can benefit from the city and its strengths.

**Health-** Health and wellbeing - We will improve health and wellbeing and reduce health inequalities.

## Financial Strategy Implications

11. Budget Council (February 2025) approved a £500k capital budget to be spent over two years to fund improvements to City Council parks, green spaces and play areas.
12. The aim of this project is to make a real difference to our parks, green spaces and play areas. The amount of investment will vary between sites or project depending on need and how the site meets the criteria. The smallest investments are likely to be in the region of £10-£15k per project.
13. The council also holds developer Section 106 contributions for parks and open space infrastructure. The S106 funding available is up to an additional £500k to support the capital funding. Where S106 Agreements allow, funding will be pooled to provide an enhanced scheme; where funding is stand alone, projects will be delivered in parallel with the core Council programme of work.
14. It should be noted that a proportion of the S106 money is committed to 3<sup>rd</sup> parties as part of the planning agreements and will be distributed in parallel with this programme of work.

## Recommendation and Reasons

15. Members are recommended to:

1. Accept the criteria detailed in Paragraphs 21 to 31.

Reason: to guide the investment of £500k in the city parks, play areas and open spaces

2. Accept the weighting approach detailed in Paragraph 32 to 35.

Reason: to prioritise investment on sites with high levels of IMD that have old play equipment and / or key infrastructure issues.

## Background

16. The Council Plan 2023-2027 which sets a clear vision for the council - *by working with the city we will establish the conditions that would make the city healthier, fairer, more affordable, more sustainable and more accessible*. As part of delivering this Plan, Budget Council in February 2025 approved a two year £500k investment into the Council parks.

17. Consideration of how the fund will be used commenced at the April meeting of the Executive Member for the Environment and Climate Emergency. It was stated in the report *“that improving green spaces, parks and play-areas that are freely available, whilst enhancing the biodiversity and increasing pollinators to ensure the spaces are more sustainable, is directly aligned to the council’s vision. In addition, residents have told the Council in petitions, the development of the Local Plan, and throughout consultations that they value the city’s unique character and how it is enhanced through well-maintained green spaces. Investing in the protection and development of public spaces leaves a lasting and positive impression of a city residents are justifiably proud of”*.

18. It is several years since the last significant capital Council investment into parks, play areas and green spaces. For example, there are in the region of 90 equipped play areas across the city, with around half provided by the city council. The rest are provided by a mix of parish and town councils, housing association, Ministry of Defence and estate management companies. The age of the equipment is generally new to 15 years old due to successive national and local funding rounds, S106 driven investment, local



fund raising and the construction of new play areas within recent housing developments. Despite this there remain a few play areas where a proportion of the equipment is 20 or more years old and several sites which have specific pieces of equipment which are even older.

## Consultation Analysis

19. This project was first reported in Public Realm Service update presented at Executive Member for the Environment and Climate Emergency decision session in April 2025. No specific comments on this aspect of the report were received.
20. The views of the Place Scrutiny Committee were sought on 24th June 2025. The draft Minutes and a response are provided below
  - i. To recommend that accessibility be added as a criteria and as part of the scope of works to understand where spend is allocated.

Response: Improved accessibility is a desired outcome of the whole project. It is recommended therefore that rather than have accessibility as a standalone criterion, every project identified through the application of the 5 recommended criteria will be subject to its own accessibility assessment.

For example, if a play area is identified in need of a rebuild then how you get into site will be considered, along with how you move round it and what is on offer or will be offered when you are there. This will be done in consultation with specialist officers within the council, appropriate external organisations, Wards and Friends groups for example.

- ii. To recommend that the radius of a park [play area] expanded [from the 300m IMD] in cases where it is the only park available to residents and there are poorer public transport options offering the ability to get to other parks.

Response: The City of York Local Plan evidence base contains location details for the city's green spaces including play areas. The Plan aims for communities to be within 480m of a play area, accordingly, gaps in provision are known. These include areas of the city centre, parts of the urban fringe, two small villages and several outlying areas within villages.

It is proposed that where a site or project is selected through the application of the 5 recommended criteria that this is mapped against the Local Plan Evidence base and known planning applications. If the site serves a community greater than the Local Plan catchment of 480 metres this will be highlighted in future reports.

- iii. To recommend that officers work with Business Intelligence to map how “destination” parks (*e.g., Rowntree Park, West Bank Park*) which attract residents from a wider catchment area should be measured when considering criteria such as deprivation.

Response: It is proposed that the IMD data for all sites is expanded to cover a radius of 500 metres, this more closely aligns with the catchment areas set in the Local Plan for play areas of 480 metres.

Where a project is suggested for a “destination” park following the application of the 5 criteria, this will be highlighted in future reports.

## Options Analysis and Evidential Basis

- 21. It is recommended that 5 criteria are used to determine which sites and projects come forward. The recommended criteria are detailed A to E below. Some sites and projects are likely to qualify under more than one criterion.

### A. Sites within communities which score higher on Indices of Multiple Deprivation (IMD).

- 22. IMD are a composite score of a range of separate indicators, grouped into seven distinct domains: Income, Employment, Education, Skills and Training, Health and Disability, Crime, Barriers to Housing and Services, Living Environment. Each Index represents a different aspect of deprivation.
- 23. The Council’s Business Intelligence Unit can provide IMD scores for the area within a 500m radius surrounding York’s open spaces and play areas. The higher the score the higher the level deprivation. Use of this criterion is likely to mean sites or projects in the following communities will score high and be prioritised: *Westfield, Clifton, Heworth, Hull Road, Acomb and Clifton Without.*

B. Projects which address long standing maintenance issues to key infrastructure.

24. Key infrastructure includes such assets as footpaths, buildings and play area safety surfacing. Investment that will extend the life of the existing asset for several years or decades. Whilst it is possible to fund such work from the revenue budget, the scale of the work required means that some schemes are just too large for this funding source. Footpath and bridge work projects would contribute to Council's Active Travel ambitions.

C. Investment into play areas with a priority to improving those sites with the oldest equipment or which would benefit from relandscaping

25. Despite previous investment there remain a few play areas where a large proportion of the equipment is 20 or more years old and several sites which have specific pieces of equipment which are even older. It is recommended that priority be given to investing into these sites.
26. Not all sites are laid out in a coherent way due to historical land ownership issues and piecemeal development around the site. By removing old fencing, improving paths or creating more open aspects the opportunity exists to create a greater sense of wellbeing and security

D. Support the expansion and retention of Green Flag Award standard

27. Over the last 20 years a range of Council parks have achieved the Green Flag award standard – see <https://www.greenflagaward.org/>. Sites are generally assessed every two years and at present Clarence Gardens, Glen Gardens and West Bank Park hold the award. Rowntree Park is awaiting the outcome of this year's judging (having missed last year due to repeated flooding) and Rawcliffe County Park is on hold pending the completion of the Environment Agency flood protection work the local area.
28. Work has been under way at Hull Road Park this last few years to improve the quality of the site (for more detail see <https://democracy.york.gov.uk/ieListDocuments.aspx?CId=870&MId=145> 99 Item 27 Paragraph 85), and this park currently has the

most potential for achieving additional Green Flag status. Investment over the next 18 months would put the park in a good position to enter for the award.

29. The fund could also be used to support the retention of the award at existing sites. Clarence Gardens pavilion for example needs internal rearrangement and upgrading so that it can accommodate community uses now that it is no longer needed as a bowls pavilion. Community involvement is one of the themes the Green Flag judges consider when assessing a site for the award.

E. Projects which have or have the potential for 3rd party funding contributions

30. In support of the fund the Council will seek to maximise other funding opportunities and use the fund to leverage external assistance in both cash and kind. This will include exploring National Lottery or other grant opportunities and partnership work with other York organisations and networks.
31. Best use will be made of Section 106 development payments in accordance with the Planning Obligations. This may include delivery of fully funded projects from S106 payments to topping up schemes to maximise the value of the project.
32. To aid decision making it is suggested that the criteria are weighted to develop a scoring matrix to rank sites and projects in most need of investment. The recommended criteria target investment at those communities in most need, as defined by IMD, and enable schemes from across the city to be considered. It recognises that there are some key infrastructure issues which could be addressed and that there are opportunities to invest in those play areas where the equipment is some of the oldest to be found in the city. In some cases, best use of the fund could be through partnering with other city organisations or seeking an external contribution towards a scheme. Finally, there is the opportunity to expand the number of council sites which hold the Green Flag.
33. The recommended approach would allocate points based on this order of priority.
  1. Sites with higher IMD
  2. Replacing play equipment over 20 years old
  3. Key infrastructure

Then equal weight to  
 4. = Green Flag award  
 4. = Availability of external funds

34. A worked example of this approach is provided below

	Location A	Location B	Location C	Location D
IMD Score	High	Medium	Medium	Low
Age of play equipment	Old	newer	newer	Nil
Infrastructure issue	No	Nil	Yes	Low
Green Flag location	No	Yes	No	No
External funds	Low	Good potential	No	limited
Rank	1	3	2	4

35. In this example Location A would score highest as it is an area of high IMD, has old equipment, and little access to external funds. Location C is next due to the high infrastructure needs, with locations B and D ranked lower.
36. An alternative approach would be to select one criterion as a driver for investment, for example, expenditure would be restricted to play areas. This is not recommended as investment would not address the wide range of issues identified in the report.
37. Some of York's parks and green spaces are War Memorials in themselves or contain Memorials. Honouring and remembering our fallen residents is very important to our communities and our War Memorials are an important part of this. They are part of our city heritage, and as such do not fit into the Parks criteria outlined above. Conservation needs will be assessed separately, and Officers will work with partners to ensure any improvement work is done sensitively and appropriately.

## Delivery

38. A Project Officer role will be created to deliver the schemes, for the duration of the programme. This will create new capacity to maximise best use of all funding opportunities to deliver the desired outcome.
39. As part of our plans to redevelop parks and play areas, we are committed to making them accessible and inclusive for everyone. We will work closely with the equalities team and partner with relevant external organisations to ensure that accessibility and inclusivity are at the heart of the design and delivery process.
40. Where possible, we will aim to make environmental improvements as part of or in parallel with the scheme or project, seeking to embed a sense of Pride in Place, improve planting for climate resilience and support Nature in our City. Records will be kept of before and after work takes place to illustrate this journey.

## Organisational Impact and Implications

41. The implications are as follows:
  - ***Financial***, are contained within the main body of the report.
  - ***Human Resources (HR)*** The additional resource referred to in paragraph 36 deliver this programme will be established and resourced in accordance with council policy. There are no other HR implications contained within this report.
  - ***Legal*** the Council does not have a statutory duty to maintain parks. However, the Council does have a duty of care to ensure the safety of public play areas and has a statutory duty under the Highways Act 1980 to maintain footpaths, and certain bridges, in a safe condition and fit for the type of traffic which is ordinarily expected to use it. Under the War Memorials (Local Authorities' Powers) Act 1923, the Council has the power, but not a duty, to maintain, repair and protect war memorials within its district The Councils policy approach to the management of parks should take into account all relevant considerations, as set out in this report. There is a growing body of case law which emphasises the

importance of public bodies taking proportionate steps to combat climate change.

- ***Procurement.*** Whilst there are no direct procurement implications relating this report itself, procurement will be a main tool used to deliver some of works if this report is approved. Future procurements for all works and/or services must be procured via a compliant, open, transparent, and fair process in accordance with the council's Contract Procedure Rules and where applicable, the Procurement Act 2023. Further advice regarding the procurement process and development of procurement strategies must be sought from the Commercial Procurement team.
- ***Health and Wellbeing*** As highlighted earlier in this report, well maintained parks and play infrastructure support physical activity, but also encourage social interaction and community engagement, all of which are beneficial for health. Prioritising funding for open spaces and play areas for those living in less affluent areas is welcome. We would also encourage development of these areas to take into account local need and views of residents including children moving forward as evidence suggests this is key to maximising use of such spaces. Finally, we urge consideration to be given to groups currently less likely to access, or facing barriers to accessing, the city's open spaces and play areas such as those with disabilities or from BME backgrounds.
- ***Environment and Climate action*** Enhancement of the city's parks and green spaces can make an important contribution to tackling the challenges of climate change. The York Climate Change Strategy sets objectives for increased tree planting, increased carbon storage and sustainable land management. These objectives should be considered in the assessment of potential investment. Capital works have the potential to increase carbon emissions, and these should be mitigated and minimised wherever possible. Opportunities for biodiversity enhancement and climate adaptation could be considered as part of the assessment for potential investment.
- ***Affordability,*** Investment in green spaces and play areas supports activities which are free at the point of participation.

- ***Equalities and Human Rights***, An Equalities Impact Assessment (EIA) is not required at this stage but will be required for the proposed work package to be presented later to Members. Specific comments on the proposed way forward are contained within the main body of the report.
- ***Data Protection and Privacy*** The completion of data protection impact assessment (DPIA) screening questions evidenced there would be no processing of personal data, special categories of personal data or criminal offence data processed, so there is no requirement to complete a DPIA.
- ***Communications*** Local engagement in – and understanding of - this work will help the council to deliver this objective with the support of people in the areas affected. It is part of a wider story of support for communities across the city and information about this investment will be presented within the context of the range of activities making a difference on the ground. This will help council to explain how the different strands of work, including this investment, work together for the places where they live and work.
- ***Economy***, None.

## Risks and Mitigations

42. Risks associated to this report, are that the criteria are not agreed and therefore causes a delay to the future report that will identify the areas for investment. This would likely result in the possibility of the funds not being invested in a timely manner or by the project planned end date risking negative reputational impact.

## Wards Impacted

43. At this stage it cannot be determined which or if all Wards will be impacted, this will be identified in the following report currently expected in September 2025.



## Contact details

For further information please contact the authors of this Decision Report.

### Author

<b>Name:</b>	Ian Houl
<b>Job Title:</b>	Head of Environment
<b>Service Area:</b>	Environmental Services
<b>Telephone:</b>	07923 206042
<b>Report approved:</b>	Yes
<b>Date:</b>	07/07/2025

### Co-author

<b>Name:</b>	Dave Meigh
<b>Job Title:</b>	Operations Manager
<b>Service Area:</b>	Public Realm
<b>Telephone:</b>	07923 217442
<b>Report approved:</b>	Yes
<b>Date:</b>	07/07/2025

## Background Papers

Budget Council 27<sup>th</sup> February 2025

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=331&MId=15004>

Meeting of the Executive Member for the Environment and Climate Emergency 29<sup>th</sup> April 2025

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=870&MId=14599>

Meeting of the Place Scrutiny Committee 24<sup>th</sup> June 2025

<https://democracy.york.gov.uk/ieListDocuments.aspx?CId=1122&MId=15314>

**Annexes** None

**Abbreviations** IMD - Indices of Multiple Deprivation

This page is intentionally left blank