



Notice of a public meeting of

Corporate Scrutiny Committee

To: Councillors Fenton (Chair), Merrett (Vice-Chair), Ayre, Baxter, Coles, K Taylor, Watson, Wells and Widdowson

Date: Monday, 19 January 2026

Time: 5.30 pm

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

AGENDA

1. Apologies for Absence

To receive and note apologies for absence.

2. Declarations of Interest

(Pages 5 - 6)

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

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

[Please see the attached sheet for further guidance for Members.]

3. Minutes

(Pages 7 - 14)

To approve the minutes of the meeting held on 10 November 2025.

4. Public Participation

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

Please note that our registration deadlines are set as 2 working days before the meeting, in order to facilitate the management of public participation at our meetings. The deadline for registering at this meeting is **5:00pm on Thursday 15 January 2026.**

To register to speak please visit

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

Webcasting of Public Meetings

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

5. Draft Report of the Budget and Medium-Term (Pages 15 - 36) Financial Strategy Task and Finish Group

Members will consider the draft report and recommendations of the Budget and Medium-Term Financial Strategy Task and Finish Group.

6. Work Plan (Pages 37 - 44)

To consider the Committee's work plan and the Scrutiny Overview plan.

7. Urgent Business

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

Democracy Officer:

Jane Meller

Contact details:

- Telephone: (01904) 555209
- Email: jane.meller@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
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我們也用您們的語言提供這個信息 (Cantonese)

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

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

Bu bilgiyi kendi dilinizde almanız mümkündür. (Turkish)

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

Declarations of Interest – guidance for Members

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

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

(2) Disclosable pecuniary interests relate to the Member concerned or their spouse/partner.

(3) Members in arrears of Council Tax by more than two months must not vote in decisions on, or which might affect, budget calculations,

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

City of York Council	Committee Minutes
Meeting	Corporate Scrutiny Committee
Date	10 November 2025
Present	Councillors Fenton (Chair), Merrett (Vice-Chair), Ayre, Baxter, Coles, Wells, Widdowson, Healey (Substitute) and Moroney (Substitute)
Apologies	Councillors Taylor and Watson
Officers in attendance	Lorraine Lunt – Information and Governance Team Manager Cath Murray – Corporate Governance Operational Manager Claire Foale – Chief Strategy Officer Shaun Gibbons – Head of Carbon Reduction Sam Blyth – Head of City Strategy and Corporate Programmes James Parker – Scrutiny Officer
In attendance	Councillor Kent - Executive Member for Environment and Climate Emergency

30. Apologies for Absence (5:30pm)

Apologies for absence were received and noted from Councillors Taylor and Watson, who were substituted by Councillors Moroney and Healey respectively.

31. Declarations of Interest (5:33pm)

Members were asked to declare at this point in the meeting any disclosable pecuniary interests or other registerable interests that they might have in the business on the agenda, if they had not already done so in advance on the Register of Interests. None were declared

32. Minutes (5:32pm)

Resolved: That the minutes of the meetings held on 8 September and 1 October 2025 be approved as a correct record, subject to the following amendment:

- That 'carp park' on page 15 of the agenda, on the minutes of the meeting held on 1 October 2025 be changed to 'car park'.

33. Public Participation (5:34pm)

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

Flick Williams spoke in relation to item 7, Monitoring and Tracking of Approved Council Motions, regarding the Equality for Disabled People Motion to adopt the Social Model of Disability from 2022 and noted that the rollout of disability training was a step forwards for City of York Council (CYC) and the post of Access Officer had had a beneficial impact. However, Flick highlighted that there had been no sign of improvement as at the time of the meeting - a good step had been taken but was not the same as an inclusive design. Flick pointed out a need for a greater understanding of disabled access needs and claimed that there was too much reliance on access forum for their time and expertise. Inclusive design training could have found and resolved many issues that have arisen if used correctly.

34. Annual Complaints Performance and Service Improvements Report April 2024 - March 2025 (5:40pm)

The Information and Governance Team Manager, and the Corporate Governance Operational Manager, presented the report and directed members to examples of compliments received about children and adult services as contained within the report.

They reported that procedures had been amended to align with the Housing Ombudsman Service's (HOS) timescales, and noted that Councillor Pavlovic, the Executive Member for Housing, Planning and Safer Communities, was the CYC representative to the HOS.

In response to questions from members, the Information and Governance Team Manager, and the Corporate Governance Operational Manager, confirmed that:

- Some formal complaints received should instead be put through as a missed service request, and due to some missed service requests being submitted as complaints these can often be duplicated and are not accounted for.
- The HOS had set out criteria for service improvements and this was currently being formed.
- Good news stories needed to be shared and CYC has internal 'High 5' and Staff Communications that can be used for this.
- Comparisons were hard to undertake with other local authorities due to different processes in place.
- RAG (Red, Amber, Green) ratings were only used for legislative procedures, a different approach was taken for corporate priorities. The Adult Social Care Procedure used the Department of Health and Social Care's RAG rating system.

It was resolved that the Corporate Scrutiny Committee:

- i. Noted the performance details contained in the report and as contained within Annex 1 and provided comments or feedback.

Reason: So that Members were provided with details and current performance to enable them to scrutinise complaints, comments, compliments and concerns to improve service delivery and ensure transparent, robust decision-making processes.

- ii. Noted the outcomes of the Local Government and Social Care Ombudsman (LGSCO) and HOS cases and published performance data and provided comments or feedback.

Reason: So that Members were provided with the LGSCO and HOS reports and findings to enable them to scrutinise complaints, comments, compliments and concerns to improve service delivery and ensure transparent, robust decision-making processes.

35. Climate Change Audit Report 2025 (6:11pm)

The Chief Strategy Officer, and Head of Carbon Reduction presented the report on the recent audit undertaken by Veritau, which was the second time in four years that CYC's Climate Change Programme (CGP) had been selected for a random audit. The Head of Carbon Reduction outlined the findings of the audit as detailed within the report and concluded that there was a sound system of governance and control, with opportunity for improvement. Feedback was requested in response to the findings.

In response to questions from members, the Chief Strategy Officer, and Head of Carbon Reduction, confirmed that:

- Some of the findings had already been incorporated into newer ways of working but there was still more work to be done.
- Issues relating to service areas needing to provide extra information through reporting as recommended from the audit had not yet been tested, but as reports were already being written, workloads would potentially not be affected greatly and this change in working would just need incorporating into work already being done. Discussions were ongoing with Procurement to ensure that any requests were proportional.

Resolved:

- i. That the Corporate Scrutiny Committee considered the options presented within the report in response to the audit findings of the Climate Change Action Plan and Carbon Emissions Reporting.
- ii. That an update on the audit findings would be brought back to update the Committee in Autumn 2026.

Reason: To inform of the Council's response to the audit findings.

[The meeting adjourned at 6:26pm and reconvened at 6:34pm]

36. Monitoring and Tracking of Approved Council Motions (6:34pm)

The Chair outlined the report, and the Committee discussed the status of the motions as seen in Annex A of the report and provided feedback.

Resolved: That members noted the contents of Annex A of the report.

Reason: To ensure that processes for monitoring and implementing approved Council motion resolutions remain sufficiently robust.

37. Process to respond to Council Motions (7:04pm)

The Chief Strategy Officer, and Head of City Strategy and Corporate Programmes presented the report, and it was noted that the current system was imperfect, and improvements and feedback were welcome. Officers advised that actions needed to be completed in a timely manner but that a time limit was difficult to work on and set in place. Items could be superseded by changes in policy, and/or in the political climate, and this should be acknowledged.

Members discussed paragraph 9.vi of the report, and it was reported that motions not aligned with CYC's Council Plan 2023-2027, including in respect of the four core commitments, would not be prioritised.

Members provided feedback on revisions to the process as follows:

- There was a need to share what actions had taken place and the progress made within the process.
- Including the mover of the motion from when petitions were presented would be beneficial.
- The Committee could ask Officers to attend meetings if lack of progress had been made within an agreed timeframe.
- The escalation process could be discretionary, dependent on the nature of the individual motion.

It was resolved that the Corporate Scrutiny Committee:

- i. Considered the proposed revision to the process.
- ii. Considered whether a time limit should be applied to the process.
- iii. Considered whether proposed motions could be provided with greater lead in time for assessment prior to Full Council.

- iv. That the Chief Strategy Officer would liaise with the Chair and Vice-Chair on updating CYC's motion process.

Reason: To inform the council's refreshed motion process.

38. Petitions Schedule (7:22pm)

The Chair outlined the report, and the Committee provided feedback to the status of petitions as seen in Annex B of the report.

Feedback was also provided in that: It would be beneficial for a column to be added indicating the ward for petition's origin, the 'Officer Responsible' column responsible should be updated as many officers named had since left CYC, and that extra information could be provided to confirm the contact made by the Officer Responsible to the petition owner.

It was resolved that the Corporate Scrutiny Committee:

- i. Noted the schedule of petitions.
- ii. Reviewed the petitions and actions planned or taken and identified any further actions they considered necessary or appropriate in line with the options available under the Council's Petitions Scheme, as set out at paragraphs 6 and 7 above.

Reason: To ensure the Committee carries out its constitutional role in relation to petitions.

39. Work Plan (7:44pm)

Members considered the work plan for the Committee and the overview work plan for the scrutiny committees.

Resolved:

- i. That a report on Digital Switchover would be received as a briefing in 2026.
- ii. That the Scrutiny Briefing Session on 4 December 2025 would include updates to:
 - Healthy weight.
 - Project management (Capital projects).
- iii. That the work plan be noted.

Reason: To ensure oversight of the scrutiny work plan.

Cllr Fenton, Chair

[The meeting started at 5.30 pm and finished at 7.48 pm].

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Corporate Scrutiny Committee

19 January 2026

Report of the Head of Democratic Services

Draft Report of the Budget and Medium-Term Financial Strategy Task and Finish Group

Summary

1. This report presents the draft report and recommendations of the Budget and Medium-Term Financial Strategy Task and Finish Group (Annex A) for the Committee's consideration. Members are asked to endorse the report and recommendations and refer them to the Council's Executive for its consideration.

Background

2. On 27 March 2025, Council endorsed a series of recommendations arising from a review of the Council's scrutiny function conducted by the Centre for Governance and Scrutiny (CfGS) during the 2024/25 municipal year. These included the following recommendation in respect of the need to develop a structured approach to budget scrutiny: 'Scrutiny taking a more deliberate and planned approach to budget scrutiny through the year. This should include a focus upon service delivery beyond finances.'
3. At the Corporate Scrutiny Committee meeting held on 9 June 2025, members considered a report of the Director of Finance outlining the Council's annual budget setting process, including the role of the Medium-Term Financial Strategy (MTFS) in projecting forward likely income and expenditure over the next three years. The Committee resolved to establish a Task and Finish Group (TFG) to provide financial scrutiny of the budget setting process and the MTFS.
4. A formal TFG proposal was brought to the Committee's next meeting held on 7 July 2025 and following amendments by the Committee, the aims and objectives of the proposal were agreed as follows:
 - Review the council's MTFS.

- Review the process through which the council will engage with residents, businesses and other stakeholders as it develops and engages on its 2026/27 budget proposals.
- Review the process through which the MTFS informs the approach to budget-setting.
- Consider whether and how the budget proposals align with the Council Plan and the ten-year strategies.
- Review responses to the public consultation on budget proposals and consider any recommendations to Executive.
- Consider any improvements to the budget-setting process which could be adopted for future years.

5. The proposed timeline entailed completing this work in time to present a report and recommendations to the January 2026 meeting of the Corporate Scrutiny Committee for consideration and approval, ahead of presentation to the Council's Executive.

6. The membership of the TFG, consisting of Cllrs Ayre, Baxter, Hook and Moroney, was agreed in August 2025.

Consultation and Findings

7. The TFG began its work in September 2025 and held five in-person meetings. Owing to the limited time available, Members decided to prioritise several key areas, including developing an understanding of the MTFS and the potential impact of the Government's Fair Funding Review, the process of consultation with residents and businesses around budget proposals, cost pressures around Adult Social Care, and capital investment.

8. Consultation took place with the Director of Finance, the Assistant Director of Finance, the Head of Communications and Engagement, and the Finance Manager for Adult Services, as well as with the Executive Member for Finance, Performance, Major Projects, Human Rights, Equality and Inclusion.

9. Based on its findings in relation to ongoing budget scrutiny, the budget-setting process, Adult Social Care, member training and development, communications and engagement, and tracking progress made against

these recommendations, the TFG agree the seven recommendations below:

Recommendation 1: That the Budget and Medium-Term Financial Strategy (MTFS) Scrutiny Task and Finish Group is re-established for the start of the next Municipal year, with a continued focus on the MTFS, the budget setting process, and the form that scrutiny of these should take.

Recommendation 2: That the re-established Task and Finish Group reviews the format of budget and budget monitoring reports with a view to ensuring greater accessibility and a sufficient level of detail to understand the impact of decisions taken on the budget.

Recommendation 3: That the Corporate Scrutiny Committee recommends to the Council's Executive that the budget-setting process commence earlier in the municipal year, to enable proposed savings to be shared sooner with Elected Members and the Task and Finish Group, allowing for greater engagement and more in-depth scrutiny of the proposals to better inform recommendations to the Executive.

Recommendation 4: That the Corporate Scrutiny Committee and the People Scrutiny Committee establish a standing joint Task and Finish Group to review the financial challenges within Adult Social Care on a regular basis.

Recommendation 5: That the Committee request, as part of the Joint Standards Committee's review of Member training and induction, that the Council looks to provide enhanced training and guidance for Members on the Council's financial position, including capital and treasury management.

Recommendation 6: That the Council identifies ways to further develop the level of communication and engagement with stakeholders and communities on the reality of the budget situation affecting the Council, which includes encouraging feedback aimed at increasing responses as part of the budget consultation process.

Recommendation 7: That the level of progress made against the recommendations will be reviewed by Corporate Scrutiny Committee as part of an agreed tracking process.

10. The draft report at Annex A provides further detail on each of these recommendations. Taken together, while acknowledging the pressures under which the Council operates, the recommendations aim to contribute to the development of a structured and consistent approach to budget scrutiny which can be carried forward into the new municipal year and beyond.

Options

11. The following options are available to Members of the Committee:

- To endorse, either wholly or in part, the draft report and recommendations, and if agreed, refer these to the Executive for its consideration.
- To amend the draft report and recommendations.
- Not to endorse the draft report and recommendations.

Analysis

12. Endorsing the draft report and recommendations would enable these to be referred to the Executive at an early opportunity, supporting the development of a more consistent and structured approach to scrutiny of the budget and MTFS. It would also enable work to commence on those recommendations which the Committee itself is able to action, particularly Recommendations 1 and 4 relating to ongoing budget scrutiny.

13. Making significant amendments to the TFG's draft report and recommendations at this stage, or not endorsing the draft report and recommendations, could cause uncertainty over the future direction of budget scrutiny and delay the development of a more deliberate and planned approach to this work.

Council Plan

14. The Medium-Term Financial Strategy aims to ensure that, as far as possible, resources are aligned to the Council's priorities.

Implications

- Financial: The recommendations can be resourced with current budgets. Members will need to be mindful however that there is only limited capacity available within the finance service to support any

future task and finish group and therefore demands will need to be prioritised.

- Human Resources (HR): None arising directly from this report.
- Equalities: None arising directly from this report.
- Legal: None arising directly from this report. The Council has a statutory duty to deliver a balanced budget. There is a connected requirement to set a MTFS setting out the authority's financial plans for the next three years.
- Crime and Disorder: None arising directly from this report.
- Information Technology (IT): None arising directly from this report.
- Property: None arising directly from this report.
- Other: None arising directly from this report.

Risk Management

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

Recommendations

16. Members are asked:

- i. To endorse the draft report and recommendations of the Budget and Medium-Term Financial Strategy Task and Finish Group; and
- ii. To request that the Council's Executive give consideration to the recommendations of the Task and Finish Group at its March 2026 meeting.

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

Contact Details

Authors:

James Parker
Scrutiny Officer
Democratic Services
james.parker@york.gov.uk

Jane Meller
Democracy Officer
Democratic Services
jane.meller@york.gov.uk

Chief Officer Responsible for the report:

Julie Gallagher
Head of Democratic Services
julie.gallagher@york.gov.uk

Report Approved



Date 9 January 2025

Wards Affected:

All



For further information please contact the authors of the report.

Background Papers:

Report of the Director of Finance, Budget Setting Process and Scrutiny. Corporate Scrutiny Committee, 9 June 2025,
<https://democracy.york.gov.uk/documents/s183621/Budget%20scrutiny%20June%202025.pdf>

Report of the Director of Governance, Budget and Medium-Term Financial Strategy Scrutiny Task and Finish Group. Corporate Scrutiny Committee, 7 July 2025,
https://democracy.york.gov.uk/documents/s184224/Task%20and%20Finish%20scoping%20cover%20report_Budget%20Scrutiny.pdf

Centre for Governance and Scrutiny (CfGS), *Scrutiny Impact Report: City of York Council* (January 2025),
<https://democracy.york.gov.uk/documents/s182228/Annex%20A%20York%20Scrutiny%20Impact%20Report.pdf>

Additional background papers used by the Task and Finish Group in the course of its work are listed in Annex A.

Annexes

Annex A – Draft Report of the Budget and Medium-Term Financial Strategy Task and Finish Group

Abbreviations

CfGS	Centre for Governance and Scrutiny
MTFS	Medium-Term Financial Strategy
TFG	Task and Finish Group

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Report of the
**Budget and Medium-Term Financial
Strategy Task and Finish Group**

January 2026



Report of the Budget and Medium-Term Financial Strategy (MTFS) Task and Finish Group to the Corporate Scrutiny Committee, 19 January 2026

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Task and Finish Group Members



Cllr Nigel Ayre



Cllr Anna Baxter
(Chair)



Cllr Anne Hook
(Vice-Chair)



Cllr John
Moroney



Chair's Introduction

Councillor Anna Baxter

I am pleased to share with the committee the findings of the Budget and Medium-Term Financial Strategy (MTFS) Task and Finish Group.

Firstly, I would like to thank everyone involved in this review: the members of the cross-party task group, who worked collaboratively in sharing their experiences; and the officers for their support with the task at what is a very busy time for them. I am also grateful for the support of the Executive Member and her commitment to open and transparent budget processes.

Our role was to provide financial scrutiny of the budget and MTFS by reviewing the process of engaging residents and businesses with the council's budget proposals, as well as the process of how the MTFS is used to inform budget setting.

Given the limited time available before the budget is considered by Council, we decided to focus on a small number of key issues.

This report sets out our recommendations and how we believe we can move forward, while acknowledging the funding gap that makes medium and long-term planning a significant challenge requiring difficult choices to be made to ensure the delivery of a balanced budget that provides best value and meets the needs of our residents. The recent government announcement of a consultation and a multi-year funding settlement for local government, (covering 2026-27 to 2028-29), should help improve the Council's ability to plan ahead.

Recommendations

1. That the Budget and Medium-Term Financial Strategy (MTFS) Scrutiny Task and Finish Group is re-established for the start of the next Municipal year, with a continued focus on the MTFS, the budget setting process, and the form that scrutiny of these should take.
2. That the re-established Task and Finish Group reviews the format of budget and budget monitoring reports with a view to ensuring greater accessibility and a sufficient level of detail to understand the impact of decisions taken on the budget.
3. That the Corporate Scrutiny Committee recommends to the Council's Executive that the budget-setting process commence earlier in the municipal year, to enable proposed savings to be shared sooner with Elected Members and the Task and Finish Group, allowing for greater engagement and more in-depth scrutiny of the proposals to better inform recommendations to the Executive.
4. That the Corporate Scrutiny Committee and the People Scrutiny Committee establish a standing joint Task and Finish Group to review the financial challenges within Adult Social Care on a regular basis.
5. That the Committee request, as part of the Joint Standards Committee's review of Member training and induction, that the Council looks to provide enhanced training and guidance for Members on the Council's financial position, including capital and treasury management.
6. That the Council identifies ways to further develop the level of communication and engagement with stakeholders and communities on the reality of the budget situation affecting the Council, which includes encouraging feedback aimed at increasing responses as part of the budget consultation process.
7. That the level of progress made against the recommendations will be reviewed by Corporate Scrutiny Committee as part of an agreed tracking process.

Background

As noted by the Centre for Governance and Scrutiny (CfGS), the ability to engage with financial information and the way in which the Council addresses its financial challenges is one of scrutiny's most pressing tasks. The need to develop a structured approach to budget scrutiny was one of the areas highlighted by the CfGS in its review of City of York Council's scrutiny function during the 2024/25 municipal year, with its final report recommending:

'Scrutiny taking a more deliberate and planned approach to budget scrutiny through the year. This should include a focus upon service delivery beyond finances.' (CfGS, Scrutiny Impact Report: City of York Council, recommendation 5).

This recommendation was approved by Full Council in March 2025. The CfGS report noted that while scrutiny had had the opportunity to review, for the first time, the results of the budget consultation for the 2025/26 budget in November 2024, there was a need to focus on ensuring effective resource management by reviewing the allocation, monitoring and use of resources, paying close attention to the Council's budgeting process from planning to delivery. Scrutiny could add value by looking at how financial and service planning fit together, and by focusing on the bigger picture rather than small details.

Remit of the Review

At the Corporate Scrutiny Committee meeting held on 9 June 2025, members considered a report of the Director of Finance outlining the Council's annual budget setting process, including the role of the Medium-Term Financial Strategy (MTFS) in projecting forward likely income and expenditure over the next three years.

The report noted the importance of financial scrutiny in ensuring clear links between budget setting and strategic plans, identifying evidence-based options for reducing costs, generating income or introducing new models of delivery, challenging the allocation, use and impact of resources, and providing an additional and transparent challenge to the Executive's management of Council's finances. It was suggested that a Task and Finish Group (TFG) could be formed to review the MTFS and the budget process, to help shape, before public consultation, the proposals being consulted on, and after public consultation to review the outcomes and make suggestions to Executive about how to proceed.

The Committee resolved to establish a TFG to provide financial scrutiny of the budget setting process and the MTFS. A formal TFG proposal was brought to the Committee's next meeting held on 7 July 2025 and following amendments by the Committee, the aims and objectives of the proposal were agreed as follows:

- Review the council's MTFS.
- Review the process through which the council will engage with residents, businesses and other stakeholders as it develops and engages on its 2026/27 budget proposals.
- Review the process through which the MTFS informs the approach to budget-setting.
- Consider whether and how the budget proposals align with the Council Plan and the ten-year strategies.
- Review responses to the public consultation on budget proposals and consider any recommendations to Executive.
- Consider any improvements to the budget-setting process which could be adopted for future years.

The initial timeline proposed involved reviewing the MTFS and the budget-setting process by 30 September 2025; reviewing budget proposals prior to public consultation; and following the public consultation, reviewing the outcomes and making suggestions to Executive about how to proceed, for the Corporate Scrutiny meeting 17 January 2026.

The membership of the TFG was agreed in early August 2025.

Structure of the Review

The Task and Finish Group held five in-person meetings as below:

- 4 September 2025
- 6 October 2025
- 3 November 2025
- 10 November 2025
- 5 January 2026

Witnesses

The Group would like to thank all the witnesses who provided evidence:

- Cllr Katie Lomas, Executive Member for Finance, Performance, Major Projects, Human Rights, Equality and Inclusion
- Debbie Mitchell, Director of Finance and Section 151 Officer
- Patrick Looker, Assistant Director of Finance
- Mike James, Head of Communications and Engagement
- Steve Tait, Finance Manager for Adult Services

Findings

The Group began its work in September 2025, and owing to the limited time available decided to prioritise several key areas, including developing an understanding of the MTFS and the potential impact of the Government's Fair Funding Review, the process of consultation with residents and businesses around budget proposals, cost pressures around Adult Social Care, and capital investment.

From this work, the Group has agreed seven recommendations as detailed below, based on its findings in relation to ongoing budget scrutiny, the budget-setting process, Adult Social Care, member training and development, communications and engagement, and tracking progress made against these recommendations. Taken together, while acknowledging the pressures under which the Council operates, the recommendations aim to contribute to the development of a structured and consistent approach to budget scrutiny which can be carried forward into the new municipal year and beyond.

Ongoing Budget Scrutiny

As part of their work the Group reviewed guides to best practice in financial scrutiny produced by the CfGS, the Chartered Institute of Public Finance and Accountancy (CIPFA), and the Local Government Association (LGA). It was clear that a structured, regular approach across the budget cycle should form part of any best practice financial scrutiny. Budget scrutiny should function as a 'rolling programme', based on early and ongoing engagement across the budget process, examining the assumptions behind emerging budget proposals rather than being confined to querying individual budget lines later in the year.

The Group also considered best practice examples from other local authorities, noting the broad range of approaches taken to budget scrutiny.

Re-establishing the Budget and Medium-Term Financial Strategy Task and Finish Group for the next municipal year would enable the work of scrutinising the budget setting process and the MTFS to continue in a structured way from early in the process. This would contribute to developing the ‘deliberate and planned approach to budget scrutiny through the year’ recommended by the CfGS. The re-established TFG would also provide an opportunity to review the most appropriate form for budget scrutiny at City of York Council.

Recommendation 1

That the Budget and Medium-Term Financial Strategy (MTFS) Scrutiny Task and Finish Group is re-established for the start of the next municipal year, with a continued focus on the MTFS, the budget setting process, and the form that scrutiny of these should take.

Although members were unable to spend time examining the budget documentation in detail, the Group noted that the published budget and budget monitoring information could, subject to available resources, be presented in ways that made them more accessible to residents, with clearer labelling and more detailed explanations on the reasoning behind the decisions being made. This would enable residents and members to gain a clearer understanding of the impact of decisions taken on the budget. Greater use could also be made of available comparative data, for example, from previous years.

A re-established TFG would provide a suitable opportunity for a review of the format of budget and budget monitoring reports.

Recommendation 2

That the re-established Task and Finish Group reviews the format of budget and budget monitoring reports with a view to ensuring greater accessibility and a sufficient level of detail to understand the impact of decisions taken on the budget.

The Budget-setting Process

Best practice guidance suggests that engagement with the budget process early from an early stage makes for more impactful and effective financial scrutiny. In particular, CfGS guidance suggests that scrutiny throughout the budget cycle, as set out below, can help shift the focus away from a line by line examination of the budget and towards earlier and more strategic engagement with the assumptions that underpin the proposals.

- Early Summer: Understand needs, review Medium Term Financial Strategy (MTFS), assess likely resources.
- Summer into Autumn: Set priorities, begin developing savings and growth proposals (intensive period of activity for Cabinet).
- Autumn into Winter: Publicise proposals, subject them to public debate at scrutiny, and refine.
- Late Winter: Formal budget and policy framework approval at full Council. The budget and policy framework is generally agreed in February. Billing authorities (unitary councils and shire districts) must complete and approve their budgets, and set their council tax, by 11 March. (CfGS, Financial Scrutiny: A Guide for Members, p. 17).

Similarly, guidance produced by CIPFA highlights ways in which scrutiny might engage with the budget setting process and the MTFS across the financial year.

The Group acknowledged the impact of the timing of the Local Government Financial Settlement on the budget-setting process, noting that the recent multi-year settlement should help facilitate an earlier start to the process over the next two budget cycles.

Commencing the budget-setting process earlier in the year would facilitate the embedding of best practice financial scrutiny at the Council by enabling proposals and the assumptions behind them to be shared sooner with Members, facilitate greater engagement and more impactful scrutiny to better inform recommendations to Executive.

Recommendation 3

That the Corporate Scrutiny Committee recommends to the Council's Executive that the budget-setting process commence earlier in the municipal year, to enable proposed savings to be shared sooner with Elected Members and the Task and Finish Group, allowing for greater engagement and more in-depth scrutiny of the proposals to better inform recommendations to the Executive.

Adult Social Care

The Group acknowledged that approximately 40% of the Council's budget is spent on Adult Services. They also noted the cost pressures on this service area, which continue to grow due to increased demand and high staffing costs. It was suggested that the current focus on short-term interventions meant there was a need for a long-term plan within Adult Social Care, noting that City of York Council remained one of the lowest funded local authorities and health economies in the country.

As such it was felt that scrutiny of the financial challenges within Adult Social Care could be usefully undertaken on a regular basis by a smaller group, and that a standing joint Task and Finish Group with the People Scrutiny Committee, under whose remit Adult Services fell, would be the most appropriate way to develop this work.

Recommendation 4

That the Corporate Scrutiny Committee and the People Scrutiny Committee establish a standing joint Task and Finish Group to review the financial challenges within Adult Social Care on a regular basis.

Member Training and Development

All councillors carry the same legal duty to safeguard the interests of local taxpayers in the management of council finances, ensuring that the budget meets community needs and is managed effectively. Through the course of the work, the Group recognised that Members need a sufficient level of knowledge and skills to meaningfully scrutinise financial documents, monitor financial

performance and participate effectively in budget discussions. As the LGA's financial scrutiny workbook explains, Members do not need to be financial experts to carry out effective scrutiny. However, they do need a reasonable understanding of the Council's financial position and the ability to ask relevant questions about it.

The development of suitable training and guidance will enable members to better discharge their responsibilities in this area. It would be appropriate for this to be considered as part of the review of Member development and training currently being undertaken through the Joint Standards Committee.

Recommendation 5

That the Committee request, as part of the Joint Standards Committee's review of Member training and induction, that the Council looks to provide enhanced training and guidance for Members on the Council's financial position, including capital and treasury management.

Communications and Engagement

The Group noted that, with the exception of engaging with businesses in the city, there was no statutory requirement to carry out a comprehensive budget consultation. Part of this year's public consultation would involve an awareness campaign around what the Council does, with case studies re-purposing existing material to convey the breadth of services delivered. It was noted that this aligned with the draft Corporate Communications and Engagement Strategy which was considered by the Corporate Scrutiny Committee in October 2025.

Group Members had a timely discussion with the Head of Communication and Engagement which led to the development of the approach to engaging with residents through the use of bite-size educational videos on the reality of the budget situation affecting the Council using social media platforms. These were delivered by the Executive Member for Finance and aimed to start conversations around council budget priorities.

While noting the limited resources available to the Council's Communications team, it was suggested that the level of communication and engagement with stakeholders and communities could be further developed.

Due to the by-election taking place in the Heworth Ward, Council communications (including around the budget consultation) have been restricted during the pre-election period which began on 8 December 2025 and runs until 15 January 2026. It has therefore not been possible for the TFG to conduct a full review of responses to the public consultation on budget proposals.

Recommendation 6

That the Council identifies ways to further develop the level of communication and engagement with stakeholders and communities on the reality of the budget situation affecting the Council, which includes encouraging feedback aimed at increasing responses as part of the budget consultation process.

Tracking Progress

The Executive / Scrutiny Protocol for City of York Council, which was incorporated into the Council's Constitution following agreement by Full Council in September 2025, states that:

‘Recommendations from Scrutiny will be logged and tracked by Democratic Services and Scrutiny Committees will receive formal reports twice each year on the number of recommendations that have been accepted and incorporated through the decision-making process and the level of progress made against the recommendations.’ (Article 8, Paragraph 14.5.3)

As such progress against the above recommendations should be tracked in this way.

Recommendation 7

That the level of progress made against the recommendations will be reviewed by Corporate Scrutiny Committee as part of an agreed tracking process.

Next Steps

Should the Committee agree to endorse the report and recommendations of the Budget and MTFS TFG, these will be referred to the Executive for consideration.

With reference to Recommendation 1 above regarding the re-establishment of the Task and Finish Group, in order to ensure that this work can be undertaken in a timely and meaningful way and avoid delay, it would be advisable to seek agreement on the membership of the re-established TFG as soon as is feasible.

With reference to Recommendation 4 above regarding a standing joint Task and Finish Group to review the financial challenges within Adult Social Care, the agreement of the People Scrutiny Committee would need to be sought, and a remit agreed.

Glossary

CfGS	Centre for Governance and Scrutiny
CIPFA	Chartered Institute of Public Finance and Accountancy
Democratic Services	A Council function supporting the democratic and decision-making processes.
Executive	The group of councillors appointed by the Leader to take decisions on behalf of the Council.
LGA	Local Government Association
MTFS	Medium Term Financial Strategy
TFG	Task and Finish Group – a cross-party working group set up to look in detail at a topic identified by the relevant scrutiny committee.

Background Papers

Report of the Director of Finance, Budget Setting Process and Scrutiny. Corporate Scrutiny Committee, 9 June 2025,
<https://democracy.york.gov.uk/documents/s183621/Budget%20scrutiny%20June%202025.pdf>

Centre for Governance and Scrutiny (CfGS), *Scrutiny Impact Report: City of York Council* (January 2025),
<https://democracy.york.gov.uk/documents/s182228/Annex%20A%20York%20Scrutiny%20Impact%20Report.pdf>

Centre for Governance and Scrutiny (CfGS), *Financial scrutiny: a guide for members* (November 2023), <https://www.cfgs.org.uk/wp-content/uploads/2023-12-11-Finance-Scrutiny-guide.pdf>

Chartered Institute of Public Finance & Accountancy (CIPFA) and Centre for Public Scrutiny (CfPS), *Financial Scrutiny Practice Guide* (June 2020),
https://www.cfgs.org.uk/wp-content/uploads/Financial-scrutiny-practice-guide_proof3.pdf

Local Government Association, *A councillor's workbook on scrutiny of finance* (November 2017),
https://www.local.gov.uk/sites/default/files/documents/11.85%20A%20councillor%27s%20workbook%20on%20scrutiny%20of%20finance_v03.pdf

Ministry of Housing, Communities and Local Government, *Fair Funding Review 2.0 Consultation*, <https://www.gov.uk/government/consultations/the-fair-funding-review-20/the-fair-funding-review-20>

Corporate Scrutiny Committee
Work Plan 2025/26

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

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

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

Potential topics for all-member briefing sessions or public meetings

Item	Origin	Lead Officer and Exec Member	Notes
Major projects – York Central update		Garry Taylor / Cllr Lomas	Public meeting
Community Woodland update from Forestry England	Cllr Kent	Shaun Gibbons Cllr Kent	Briefing
Digital Switchover		Roy Grant	Briefing
Customer Services developments		Pauline Stuchfield, Eilidh Carricker	
Project Management	Corporate scrutiny 07/07	Claire Foale	Briefing
F&P Q1	Regular Report	Debbie Mitchell, Ian Cunningham Cllr Lomas	Information to be shared with members via e-mail

Item	Origin	Lead Officer and Exec Member	Notes
F&P Q2	Regular Report	Debbie Mitchell, Ian Cunningham Cllr Lomas	Information to be shared with members via e-mail
F&P Q3	Regular Report	Debbie Mitchell, Ian Cunningham Cllr Lomas	Information to be shared with members via e-mail
Local Nature Recovery Strategy	Moved from November's meeting	Shaun Gibbons / Guy Hanson / Alison Cooke Cllr Kent	Briefing. Consultation over the summer, due for approval 04/11/25

Briefing session dates

- Thursday 26 February
- Thursday 16 April

Agreed Task & Finish Groups

Topic and timescale	Aims and objectives	Membership
Preparing for proposed changes to long-term sickness and disability benefits. No timescale set for final report to People Scrutiny Committee	<ul style="list-style-type: none"> • Acquire a detailed understanding of the scope of the proposed changes and the likely direct and indirect impacts • Establish the number of York residents likely to be affected by the changes if they are implemented as currently proposed 	Cllr Fenton Cllr Runciman Cllr Steward Cllr Coles Cllr J Burton

	<ul style="list-style-type: none"> • Identify what additional financial or other support affected residents may seek to access from the council and partners • Identify how affected residents can best be supported to access help, such as applying for other benefits for which they may be eligible • Establish whether capacity exists to meet a potential increase in demand for services or support • Make recommendations as to how the council and partners can most effectively allocate resources to support affected residents 	
<p>Budget and Medium Term Financial Strategy Scrutiny</p> <p>Final report to be considered at Corporate Scrutiny Committee meeting on 19 January 2026</p>	<ul style="list-style-type: none"> • Review the council's MTFS • Review the process through which the council will engage with residents, businesses and other stakeholders as it develops and engages on its 2026/27 budget proposals • Review the process through which the MTFS informs the approach to budget-setting • Consider whether and how the budget proposals align with the Council Plan and the ten-year strategies • Review responses to the public consultation on budget proposals and consider any recommendations to Executive 	<p>Cllr Ayre Cllr Hook Cllr Baxter Cllr Moroney</p>

	<ul style="list-style-type: none"> • Consider any improvements to the budget-setting process which could be adopted for future years 	
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Possible Task & Finish Groups

Topic	Aims and objectives	Membership
Procurement		
Community Infrastructure Levy	Better understand the approach to implementation of the CIL in parished and unparished areas, and in particular, what advantages parished areas might have.	

Scrutiny Overview Work Plan

Meeting Date	Committee	Agenda Item
19/01/26	Corporate	<ul style="list-style-type: none"> Budget and MTFS Task and Finish, final report
26/01/26	Place	<ul style="list-style-type: none"> Local Transport Plan Update Property Asset Management Strategy
11/02/26	People	<ul style="list-style-type: none"> Food Insecurity Task and Finish Group draft report (tbc) City of York Council: local authority assessment CQC report
02/03/26	Corporate	<ul style="list-style-type: none"> Evaluation of the business decarbonisation support programme

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

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