
**Health, Housing and Adult Social Care
Scrutiny Committee**

9 October 2024

Report of the Director of Finance

2024/25 Finance and Performance Monitor 1

Summary

1. This report sets out the projected 2024/25 financial position and the performance position for the period covering 1 April 2024 to 30 June 2024, together with an overview of any emerging issues. This is the first report of the financial year and assesses performance against budgets, including progress in delivering the Council's savings programme.
2. This report outlines the Council's challenging financial position with a forecast overspend for 2024/25 of £3.4m. This is a huge improvement on the £11.4m forecast overspend we have previously seen at this stage in the financial year and is a direct result of the significant work undertaken by officers across all parts of the Council to identify savings and mitigations.
3. However, there is still a forecast overspend and therefore, whilst it is incredibly positive that the position is much improved, there remains a great deal of work still to do. It remains clear that the Council cannot afford to keep spending at this level. The general reserve is £6.9m and, whilst we have other earmarked reserves that we could call on if required, continued overspending will quickly see the Council exhaust its reserves.
4. The existing cost control measures remain in place, and further action is needed to bring spending down to an affordable level, both within the current financial year and over the next 3 years, to safeguard the Council's financial resilience and stability. The impact that this work is having can be clearly seen in this latest forecast 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.

5. If we continue to take action and make any difficult decisions now, this will ensure the future financial stability of the Council and that we can continue to provide services for our residents. It is vital that mitigations are delivered, and the forecast overspend is reduced.

Background

Financial Summary and Mitigation Strategy

6. The current forecast is that there will be an overspend of £3.4m. This is despite the additional budget allocated through the 2024/25 budget process and ongoing action being taken by managers across the Council to try and reduce expenditure. If the Council continues to spend at the current level, and no action is taken, then we will continue to overspend and will exhaust our reserves and any other available funding. The current level of expenditure is unaffordable and therefore we must continue the work started in the previous financial year to identify and take the necessary actions to reduce expenditure.
7. As outlined in reports to Executive throughout the previous financial year, we have continued to see recurring overspends across both Adult and Children's Social Care. However, the underspends and mitigations that have allowed us to balance the budget at year end have generally been one off. Whilst the use of reserves to fund an overspend is appropriate as a one-off measure, it does not remove the need to identify ongoing savings to ensure the overall position is balanced. The budget report considered by Executive in February 2024 also included an assessment of risks associated with the budget, which included the need to secure further savings and effectively manage cost pressures.
8. 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.
9. Given the scale of the financial challenge, and the expected impact on budgets in future years, it is vital that every effort is made to balance the overall position. It is recognised that this will require difficult decisions to be made to protect services for vulnerable residents.

10. Corporate control measures are in place, but it is unlikely they will deliver the scale of reduction needed within the year. Other savings proposals, including service reductions, may also be needed. Officers will continue to carefully monitor spend, identify further mitigation, and review reserves and other funding to make every effort to reduce this forecast position. However, it is possible that it will not be reduced to the point that the outturn will be within the approved budget. The Council has £6.9m of general reserves that would need to be called on if this were the case. As outlined in previous reports, any use of the general reserve would require additional savings to be made in the following year to replenish the reserve and ensure it remains at the recommended minimum level.
11. The delivery of savings plans continues to be a clear priority for all officers during the year. Corporate Directors and Directors will keep Executive Members informed of progress on a regular basis.

Financial Analysis

12. The Council's net budget is £149m. Following on from previous years, the challenge of delivering savings continues with c£14m to be achieved to reach a balanced budget. Early forecasts indicate the Council is facing net financial pressures of £3.4m and an overview of this forecast, on a directorate basis, is outlined in Table 1 below.

| Service area | Net budget £'000 | 2024/25 Forecast Variation £'000 |
|------------------------------------|---------------------|---|
| Children & Education | 28,659 | 1,359 |
| Adult Social Care & Integration | 45,307 | 2,361 |
| Transport, Environment & Planning | 23,464 | -547 |
| Housing & Communities | 6,614 | 792 |
| Corporate & Central Services | 44,724 | -69 |
| Sub Total | 148,768 | 3,896 |
| Contingency | 500 | -500 |
| Target for further mitigation | | |
| Total including contingency | 149,268 | 3,396 |

Table 1: Finance overview

Directorate Analysis

Adults

13. The projected outturn position for Adult Social Care is an overspend of £2,361k and the table below summarises the latest forecasts by service area. This projection is based on customer numbers and costs in the first two months of the year. The projection assumes that £2,188k of previously agreed savings will be made by the end of the year.

| 2023/24 Outturn £'000 | | 2024/25 Budget £'000 | Forecast Outturn Variance £'000 | Forecast Outturn Variance % |
|-----------------------------|-------------------------------------|----------------------------|--|--------------------------------------|
| +1,579 | Direct Payments | 4,841 | 1,096 | 22.6 |
| +1,848 | Home and Day Support | 1,234 | 61 | 4.9 |
| +1,420 | Supported Living | 15,689 | 2,123 | 13.5 |
| +2,333 | Residential care | 12,664 | 255 | 2.0 |
| +838 | Nursing care | 5,149 | 220 | 4.3 |
| -525 | Short term placements | 1,251 | 0 | 0 |
| +64 | Staffing (mostly social work staff) | 7,313 | 316 | 4.3 |
| -123 | Contracts and Commissioning | 2,214 | -98 | -4.4 |
| -136 | In House Services | 4,881 | -28 | -0.6 |
| +179 | Be Independent & Equipment | 982 | 468 | 47.7 |
| -1,495 | Other | -10,850 | 122 | 1.1 |
| +71 | Recharges | -61 | 14 | 23.0 |
| | Savings to be delivered | | -2,188 | |
| +6,053 | Total Adult Social Care | 45,307 | 2,361 | 5.2 |

14. The forecast position for Adult Social Care is an overspend of £2,361k. This is based on customer numbers and costs in the first two months of the year. The projection assumes that agreed savings of £2,188k will be made by the end of the year.
15. ASC has received total growth of £7m in 2024/25. £1.4m of this growth has been allocated to fund inflationary pressures, £800k to reducing growth needed by managing demand and £500k has been allocated to fund savings which are unlikely to be achieved this year. In addition to this £300k has been set aside to fund Preparing for Adulthood (PFA)

customers coming through from Children's Services and £200k to tackle the current review backlog where it is expected that there are savings to be crystalised.

16. The Council has received several requests from providers for higher rates of inflation than have currently been agreed. These requests will be considered on a case by case basis, and if agreed, will put further pressure on the budget. This possibility needs to be balanced by the risk of provider failure / withdrawal from the market which would incur costs on finding new placements for customers, etc.
17. The projected overspend is largely due to the incomplete delivery of prior year savings targets carried through from previous years' budgets.
18. The directorate is taking the following action to improve the financial position;
 - a) The reablement contract has been retendered and is starting to be implemented. This is designed to support more people to go through the reablement service in a shorter time frame, at lower cost, resulting in more people with lower or no care needs. Contract monitoring arrangements are being put in place to make the most of the contractual arrangements that promote good performance and enable the reduction in payment should the provider not deliver. Occupational Therapy expertise has a key role to play in maximising independence and reducing level of need: Therapy led reablement is known to be effective and additional occupational therapy is planned to be deployed to support this.
 - b) The provision of support to people overnight by internal adult social care provision is under review with a view to remodelling support and reducing costs while ensuring we continue to meet our duty to meet eligible needs.
 - c) Further work is being undertaken in relation to continuing health care funding. This includes developing a consistent approach with other local authorities in the ICB, improved engagement in the process by CYC including developing joint training and processes to support resolution of disputes.
 - d) The Adult Social Care practice assurance process continues to be developed with an emphasis on embedding the strength-based approach to practice and supporting decision-making at the earliest opportunity. This process will be linked with our Workforce Development colleagues to assure any learning identified informs

future practice. The Assurance Forum will look to ensure that Community and individual networks and community based resources have been considered. This also gives consideration of a range of issues including: alternatives to high cost provision, the prevention of expensive off- framework provision, ensures full use of in house and block provision, the use of equipment and technology, and where possible, the reduction of proposed paid for care.

- e) A working group has been established to carry out a detailed review of Direct Payments which should lead to a reduction in the overspend on these budgets.

- 19. The following sections describe any significant variations to budgeted costs, customer numbers and income. The variations are generally due to not fully meeting previous years' savings targets plus significant price pressures in the market. Some variations are large due to having small numbers of individuals within those budgets whose individual needs can vary significantly.

Direct Payments (£1,096k overspend)

- 20. The main overspend is on the Learning Disability (LD) direct payments budget, which is expected to overspend by £1,172k. This is due to the average cost of a direct payment being £108 per week more than in the budget (£685k), and the average cost of transport for direct payment being £38 per week more than budget (£214k). In addition the average weekly health income received per customer is less £546 less than in the budget (£256k).
- 21. A working group has been established to carry out a detailed review of Direct Payments which should lead to a reduction in the overspend on these budgets.

Supported Living (£2,123k overspend)

- 22. Supported Living are settings where more than one customer lives, with their own tenancy agreements, where their needs are met by a combination of shared support and one to one support. Supported Living providers received a mid-year inflationary increase in 2023/24 which was covered by the MSIF grant and the pressures shown below are in part due to the full year effect of this increase.
- 23. The Learning Disability Supported Living budget is projected to overspend by £1,402k. The average cost of a placement is £87 per week more than in the budget (£843k), there are four more customers than budgeted for

(£368k) and expenditure on voids is expected to be around £159k this year.

24. The Physical & Sensory Impairment Supported Living schemes budget is projected to overspend by £497k. This is due to the average cost of a placement being around £270 per week higher than in the budget (£689k), partially offset by having 4 fewer customers in placement than assumed in the budget.
25. The Mental Health Supported Living schemes budget is projected to overspend by £224k. This is due to the average cost of a placement being around £215 per week higher than in the budget (£236k).

Residential care (£255k overspend)

26. Mental Health permanent residential care is projected to underspend by £200k. There is one less customer in an OP placement than assumed in the budget (-£72k) and the average cost of an OP placement is £206 per week less than assumed in the budget (-£129k). In addition, the average weekly health income has increased compared to budget (-£89k). This is offset by having one more customer in a working age placement than was assumed in the budget.

Nursing Care (£220k overspend)

27. LD Permanent Nursing Care budgets are expected to overspend by £112k. This is due to having 3 more customers OP nursing placements than was allowed for in the budget.
28. Mental Health Nursing Care budgets are expected to overspend by £320k. This is due to having 4 more customers in placement than was allowed for in the budget (£564k), partially offset by having 3 more customers receiving health income.
29. OP Permanent Nursing Care is projected to underspend by £301k. This is due to the average cost of a placement being £204 a week less than in the budget (-£1,214k). This is offset by having 2 more customers in placement (£70k), a reduction in the average weekly customer contributions received of £87 (£410k), and a reduction in weekly average health income received per customer of around £2k per week compared to the budget (£462k).
30. The P&SI Nursing budget is expected to overspend by £88k. This is largely due to the average weekly cost per customer being higher than assumed in the budget.

In House Services and Staffing

31. The Council employs a variety of staff to advise and assess residents' and customers' social care needs. We also directly provide care and support to individuals and have teams which provide home care both overnight in the community 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 customer groups.

Staffing (£316k overspend)

32. There are staffing overspends in the Hospital Discharge Team, Mental Advocacy Team, and the Social Work Team. Mostly due to these teams being over establishment and using agency staff. This is partially offset by vacancies elsewhere in the service.

Contracts and Commissioning (£98k underspend)

33. Based on activity to date there is likely to be an underspend on the Carers commissioned services budget by the end of the year.

In House Services (£28k underspend)

34. There is projected to be an overspend on Yorkcraft of around £188k, due to savings which are not likely to be achieved this year (£124k), together with an underachievement of income. This is offset by staffing underspends on the PSS service.

Be Independent & Equipment (£468k overspend)

35. Be Independent provide equipment to customers to allow individuals to remain independent and active within their communities. They also provide an alarm response service means tested as to whether a customer pays for it.
36. There is still a budget gap of £180k arising from when the service was originally outsourced which has yet to be fully addressed. Staffing is expected to overspend by £120k largely due to an unfunded regrade of some of the posts in the team and to having a review manager post above establishment. The vehicle hire budget is projected to overspend by £30k and there has been an increase in rental costs for the premises which will be fully absorbed by the service and not recharged to Mediquip this year (£50k). In addition, there is expected to be an underachievement of income based on current customer numbers (£21k) and the decision to end equipment sales (£49k).

Housing Services (General Fund)

37. There is a forecast underspend of £10k across Housing Services General Fund at Monitor 1. The table below summarises the latest forecasts by service area.

| 2023/24 Outturn £'000 | Housing & Communities (Extract) | 2024/25 Budget £'000 | Forecast Outturn Variance £'000 | Forecast Outturn Variance % |
|-----------------------------|------------------------------------|----------------------------|--|--------------------------------------|
| -101 | Housing Services | -126 | +1 | 0.8 |
| +6 | Healthy & Sustainable Homes | 352 | -11 | -3.1 |
| -0 | Building Services | -523 | 0 | 0.0 |
| -95 | TOTAL | -297 | -10 | -3.4 |

38. The General Fund services across Housing which covers Homelessness services, provision of Hostels and Travellers Sites, Healthy and Sustainable Homes and Building Services. At monitor 1 it is currently anticipated that the services will be broadly delivered within budget.

Housing Revenue Account

39. 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).

| 2023/24 Outturn £'000 | | 2024/25 Budget £'000 | Forecast Outturn Variance £'000 | Forecast Outturn Variance % |
|-----------------------------|---------------------------|----------------------------|--|--------------------------------------|
| -366 | Repairs & Maintenance | 10,867 | 0 | 0 |
| -1,161 | General Management | 7,777 | -26 | -0.3 |
| -118 | Special Services | 3,912 | -232 | -5.9 |
| -463 | Other Expenditure | 19,870 | +1,092 | 5.5 |
| +630 | Dwelling rents | -37,877 | -78 | 0.2 |
| -12 | Non-Dwelling Rents | -582 | -35 | 6.0 |
| +193 | Charges for Services | -2,379 | +249 | -10.5 |
| -2,409 | Other Income | -1,318 | -1,026 | 77.8 |
| -3,706 | Total | 270 | -56 | -20.7 |
| 1,926 | Deferred Rev Contribution | - | - | - |
| 0 | Debt Repayment | 8,400 | 0 | 0 |
| -1,780 | Revised Position | 8,670 | -56 | -0.6 |

40. At the early stage of the year, it is assumed that repairs will be within budget although there have been delays in delivering a number of the projects particularly the painting contract. Any underspends in the area are planned to be diverted to dealing with the backlog in aids and adaptations.
41. There is a forecast underspend across special services primarily due to savings from Glen Lodge as the refurbishment scheme is delivered. This is offset from reduced income in the Charges for Service line.
42. Across other expenditure there is a forecast increase in the depreciation charge (£700k) which provides the Major Repairs reserve. There is also increased interest costs following a loan being taken out in 2023/24 to fund Housing Delivery projects (£293k).
43. General rents are forecast to be slightly better than budget at this stage in the year as are garage rents and shared ownership rents (£-113k).
44. Within other income given the continued level of interest rates remaining at 5% it is estimated that interest earned will be c £1m above budget which will fund the depreciation and interest payment overspends.
45. The high level of working balance is available to start repaying the £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 is due to be repaid at 31st March 2025. These are to be funded from general HRA reserves.
46. The HRA working balance position as at 31st March 2024 was £30.0m and are forecast to reduce to which is higher than assumed when the budget was set. The latest forecast balance at 31st March 2025 is estimated to reduce to £21.4m.
47. The government has announced additional flexibility around the uses of right to buy receipts for 2024/25 and 2025/26 and it is anticipated that there will be further announcements made as part of the budget which will be held on 20th October 2024. This may impact HRA opportunities and implications will be reported back to members in due course.

Performance – Service Delivery

48. 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. This report only includes indicators where new data has become available, with a number of indicators that support the Council plan being developed. Wider or historic strategic and operational performance information is published quarterly on the Council’s open data platform; www.yorkopendata.org.uk
49. 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.
50. A summary of the city outcome and council delivery indicators by council plan theme are shown in the paragraphs below along with the latest data for the core indicator set.

| Health and wellbeing: A health generating city (City) | | | | | | |
|--|--------------------|--------------------|-----------|-----------|-----------------------------|--|
| | Previous Data | Latest Data | DoT | Frequency | Benchmarks | Data Next Available |
| Number of children in temporary accommodation - (Snapshot) | 63 (2022/23) | 45 (2023/24) | ↓ Good | Quarterly | Not available | Q1 2024/25 data available in November 2024 |
| Slope index of inequality in life expectancy at birth - Female - (Three year period) | 6.2 (2019/20) | 5.7 (2020/21) | → | Annual | Regional Rank 2020/21: 3 | 2021/22 data available TBC |
| Slope index of inequality in life expectancy at birth - Male - (Three year period) | 8.3 (2019/20) | 8.4 (2020/21) | → | Annual | Regional Rank 2020/21: 3 | 2021/22 data available TBC |
| % of adults (aged 16+) that are physically active (150+ moderate intensity equivalent minutes per week, excl. gardening) | 70.4% (2022/23) | 69.8% (2023/24) | → | Annual | National Data 2023/24 63.4% | 2024/25 data available in April 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 | | | | | | |

51. **Number of children in temporary accommodation** – at the end of 2023-24, there were 45 children in temporary accommodation in York which, although an increase from 39 children the previous quarter, is a reduction from 63 at the end of 2022-23. 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.
52. **% of adults (aged 16+) that are physically active** – The latest data from the Adult Active Lives Survey for the period from mid-November 2022 to

mid-November 2023 was published in April 2024. Data for 2024-25 will be available in April 2025. In York, 515 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. Positively:

- 69.8% of people in York did more than 150 minutes of physical activity per week compared with 63.4% nationally and 61.7% regionally. There has been no significant change in the York value from that 12 months earlier.
- 18.8% of people in York did fewer than 30 minutes per week compared with 25.7% nationally and 27.7% regionally. There has been no significant change in the York value from that 12 months earlier.

| 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 - Disabled People (ASC User Survey) | 79% (2021/22) | 78% (2022/23) | → | Annual | Not available | 2023/24 data available in December 2024 |
| Percentage of people who use services who have control over their daily life - Older People (ASC User Survey) | 71% (2021/22) | 77% (2022/23) | ↑ Good | Annual | Not available | 2023/24 data available in December 2024 |
| Overall satisfaction of people who use services with their care and support | 65.10% (2021/22) | 66.50% (2022/23) | → | Annual | National Data 2022/23 64.40% | 2023/24 data available in December 2024 |
| Health Inequalities in wards | See below | See below | → | Annual | Not available | 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 | Not available | 2021/22 data available in December 2024 |
| 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 | Not available | 2021/22 data available in December 2024 |
| 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 | Not available | 2021/22 data available in December 2024 |
| 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 | Not available | 2021/22 data available in December 2024 |
| 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 | Not available | 2021/22 data available in December 2024 |
| 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) | 13.10% (2021/22) | 13.65% (2022/23) | → | Annual | Not available | 2023/24 data available in October 2024 |
| Absolute gap in % of Year 6 recorded overweight (incl. obesity) between highest and lowest York ward (3 year aggregated) | 24.40% (2021/22) | 24.68% (2022/23) | → | Annual | Not available | 2023/24 data available in December 2024 |
| Absolute gap in % of children totally or partially breastfeeding at 6-8 weeks between highest and lowest York ward (4 year aggregated ward data) | 36.70% (2021/22) | 38.98% (2022/23) | → | Annual | Not available | 2023/24 data available in October 2024 |

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

53. **Percentage of people who use services who have control over their daily life – Disabled People** – In 2022-23, 78% 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 the same as the percentage in the Y&H region as a whole. It is higher than the corresponding percentage who gave one of these responses in England as a whole (77%). It has slightly decreased in York from the 2021-22 figure (79%). Data for 2023-24 will be available in December 2025.

54. **Percentage of people who use services who have control over their daily life – Older People** – In 2022-23, 77% 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 higher than the corresponding percentages experienced by older people in the Y&H region and in England as a whole (both 74%). It has also increased in York from the 2021-22 figure (71%). Data for 2023-24 will be available in December 2025.
55. **Overall satisfaction of people who use services with their care and support** – Data at LA and national level for 2022-23 was published in December 2023, and the data shows that there has been a slight increase 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 2021-22 (up from 65% to 67%). The levels of satisfaction experienced by York’s ASC users in 2022-23 were slightly higher than those in the Y&H region (66% said they were “extremely” or “very” satisfied with the care and support from their LA) and in England as a whole (64% gave one of these answers). Data for 2023-24 will be available in December 2025.
56. **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. New data will be available in December 2024.
- 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 2020-21 to 2022-23 was 24.7% (the gap between 43.4% in Westfield and 18.8% in Heworth Without). The trend in this gap indicator shows a widening in the difference between the values in the highest and lowest ward over time (12.6% in 2011-12 to 2013-14 to 24.7% 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 2019-20 to 2022-23 was 13.7% (the difference between 96.6% in Bishopthorpe and 82.9% in Fulford & Heslington). At present there is only one previous value for this indicator (13.1% for

the period 2018-19 to 2021-22) so it is not yet possible to identify a trend.

- 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 2019-20 to 2022-23 was 40% (the gap between 79.8% in Heworth Without and 40.8% in Westfield). There is not a long trend history for this indicator but there has been slight widening of the gap from the 4 year period 2017-18 to 2020-21 (36.5%) to the most recent 4 year period (39%).

| 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 | 109 (2022/23) | 122 (2023/24) | ➡ | Quarterly | Not available | Q1 2024/25 data available in September 2024 |
| % of dwellings with energy rating in A-C band in the EPC Register - Snapshot | 44.60% (2023/24) | 45.10% (Q1 2024/25) | ↑ Good | Monthly | Not available | Q2 2024/25 data available in November 2024 |
| Net Additional Homes Provided - (YTD) | 459 (2022/23) | 528 (2023/24) | ↑ Good | Bi-annual | Not available | 2024/25 mid-year data available in December 2024 |
| Net Housing Consents - (YTD) | 1,559 (2022/23) | 658 (2023/24) | ↓ Bad | Bi-annual | Not available | 2024/25 mid-year data available in December 2024 |
| Number of homeless households with dependent children in temporary accommodation - (Snapshot) | 35 (2022/23) | 29 (2023/24) | ↓ Good | Quarterly | Not available | Q1 2024/25 data available in October 2024 |
| Number of people sleeping rough - local data - (Snapshot) | 23 (2023/24) | 22 (Q1 2024/25) | ➡ | Monthly | Not available | Q2 2024/25 data available in October 2024 |
| HMO's as % of properties in York | NA | NA | ➡ | Annual | Not available | TBC |

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

57. **Number of new affordable homes delivered in York** – During 2023-24, affordable housing completions have been significantly below the identified level of need with 122 homes delivered (109 in 2022-23). 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 has accessed a range of funding opportunities for direct delivery in addition to securing over half of the total completions during 2023-24 through Section 106 planning agreements.
58. There remains a significant 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. Inclusive of applications with a resolution to approve from Planning Committee, there are over 1,000 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. The remainder are at Outline stage, with more uncertainty on timescales and final delivery levels, including the York Central affordable housing contribution. Data for Q1 2024-25 will be available in September 2024.

59. **% 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. In 2023, the median energy efficiency rating for a dwelling in England was Band D and a rating of A-C is generally considered to be good energy performance.
60. The % of properties on the register for York with an EPC rating of A-C at the end of June was 45.1%. This measure has increased incrementally month on month since CYC began reporting on the information 16 months ago when 42% of properties were rated A-C. The largest changes continue to be in the middle categories with around 3% less properties rated D-E and around 2.5% more rated C. The median grade for York as at June was band D which follows the latest national benchmark. Data is based on the last recorded certificate for 60,218 properties on the register for York, some of which will have been last assessed more than ten years ago.
61. **Net Additional Homes** – Between 1st April 2023 and 31st March 2024, a total of **462 net additional homes** were completed. This total comprises two elements:
- There has been a total of 529 net housing completions. This represents 69 more completed homes compared to the previous twelve-month monitoring period. The main features of the housing completions that were carried out are:

- 480 homes (90.9%) were completed on housing sites (Use Class 3). Of this, 390 were new build homes (81%).
 - 8 homes were demolished during the monitoring period.
 - Individual sites that saw the construction of five or less dwellings during the monitoring period contributed just 56 (10.6%) homes.
 - Significant sites providing housing completions (Use Class C3) over the monitoring period have been Germany Beck (117), The Cocoa Works, Haxby Road (Phase 1 Blocks B and C) (107), Former Civil Service Club, Boroughbridge Road (79) and the Former Vacant Site, Eboracum Way (62).
 - A net total of 29 (5.5%) off campus, privately managed student 'cluster flats' were completed at Aubrey House Foss Islands Road.
 - 143 (27.1%) net additional homes were a result of changes from other uses to residential homes.
- A loss of 66 net equivalent homes resulted from the closure of three care homes within the authority area during the twelve-month monitoring period.

62. **Net Housing Consents** – Planning applications determined during the full monitoring period of 1st April 2023 to 31st March 2024 resulted in the approval of **658 net additional homes**. This compares to 1,559 net approvals granted the previous year. However, a further 513 homes were approved at Planning Committee during the monitoring period and are still awaiting legal agreement sign off.

63. The main features of the housing approvals are:

- 577 of all net homes consented (87.7%) were granted on housing sites (Use Class C3).
- Significant sites granted approval for housing (Use Class C3) includes Land at New Lane, Huntington (300), Os Field South of & Adjacent to 1 Tadcaster Road, Copmanthorpe (158), Land East of Middlewood Close, Rufforth (21) and Clifton Without County Junior School, Rawcliffe Drive (15).
- 59 homes were approved on sites of 5 or less homes.
- A net total of 33 new homes across three sites were granted 'prior approval', the most significant of which was at Gateway 2, Holgate Park Drive (31).
- 44 net new retirement homes were allowed on appeal at 11 The Village, Wigginton.

- A further 513 homes have been approved through a resolution to grant consent at Planning Committee over the last twelve months and are currently subject to the execution of a section 106 legal agreement. These sites include:
 - Land to the East of Millfield Industrial Estate, Main Street, Wheldrake (139).
 - Enterprise Rent-a-car, 15 Foss Islands Road (133).
 - Paddock lying between Park Lodge and Willow Bank, Haxby Road (117).
 - Land to the South-East of 51 Moor Lane, Copmanthorpe (75).
 - Tramways Club, 1 Mill Street (35).

64. **Number of homeless households with dependent children in temporary accommodation** – The overall number of households in temporary accommodation has reduced during 2023-24, from 73 in Q1 to 63 at the end of Q4. The number of those with dependent children has fluctuated between 26 and 30 households throughout the year and was 29 households at year-end. Although the council would like these to reduce further, some progress has been made from the peaks seen at the end of 2022-23.
65. Of the 29 households with children in temporary accommodation at quarter end, 27 were recorded as accommodated in hostels and two within Local Authority or Housing Association housing stock. York continues to report no households with children housed in Bed and Breakfast accommodation at quarter end.
66. During 2023-24, an upward trend in overall numbers can be seen both nationally and regionally, however York has been moving in the opposite direction. When looking at the total number of households in temporary accommodation per households in area (000s), York continues to perform positively compared to benchmarks (0.71 in York compared to 4.9 Nationally, 1.4 Regionally and 17.8 in London). It should be noted that these figures are snapshot figures and therefore may fluctuate between the snapshot dates.
67. **Number of people sleeping rough** – Every Thursday, Navigators carry out an early morning street walk checking known rough sleeping hot spots and responding to intel or reports of rough sleepers. The monthly figure is based on the number of rough sleepers found bedded down on the last Thursday of each month. The latest figure shows that there were 22 people sleeping rough in York in June 2024, which is a slight decrease from 23 people at the end of 2023-24.

| 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 | 4.88% (2021/22) | 1.60% (2022/23) | ↓ Good | Annual | Not available | 2023/24 data available in September 2024 |
| % of Repairs completed on first visit | 80.26% (2023/24) | 86.08% (Q1 2024/25) | → | Quarterly | Housemark Median 2022/23 86.02% | Q2 2024/25 data available in October 2024 |
| Number of Void Properties - Standard Voids - (Snapshot) | 52 (2023/24) | 59 (Q1 2024/25) | → | Monthly | Not available | Q2 2024/25 data available in October 2024 |
| Number of Void Properties - Major Works Voids - (Snapshot) | 6 (2023/24) | 3 (Q1 2024/25) | ↓ Good | Monthly | Not available | Q2 2024/25 data available in October 2024 |
| Number of Void Properties - Capital Projects Voids - (Snapshot) | 26 (2023/24) | 19 (Q1 2024/25) | → | Monthly | Not available | Q2 2024/25 data available in October 2024 |
| Number of Void Properties - Total Voids (Excludes Not Offerable) - (Snapshot) | 84 (2023/24) | 81 (Q1 2024/25) | ↓ Good | Monthly | Not available | Q2 2024/25 data available in October 2024 |
| Number of Void Properties - Not Offerables - (Snapshot) | 77 (2023/24) | 77 (Q1 2024/25) | → | Monthly | Not available | Q2 2024/25 data available in October 2024 |
| % of tenants satisfied that their landlord provides a home that is well maintained | NC | 63.58% (2023/24) | → | Annual | Not available | 2024/25 data available in February 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

68. **% of dwellings failing to meet the decent homes standard –** Provisional data submitted through the Local Authority Housing Statistics Return shows that at the end of 2023-24, 140 council properties were considered to be non-decent which is 1.9% of council housing stock. This return is awaiting sign off by the Department for Levelling Up Housing and Communities but is not expected to change. The 2023-24 figure is a slight increase from 1.6% of properties at the end of 2022-23 but is below the regional and national benchmarks for that year (2.4% properties in Yorkshire and the Humber and 8.4% in England). The latest benchmarking is awaited.
69. 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.

70. **% of repairs completed on first visit** – The percentage of repairs completed on the first visit was 86% in Q1 2024-25, which is 6 percentage points higher than at the end of 2023-24.
71. **Number of void properties** – Numbers of standard void properties reduced throughout 2023-24 from 73 at the start of the year to 52 in March 2024. This has increased slightly to 59 at the end of Q1 2024-25. There were 3 major works voids at the end of June 2024 which is a large decrease on the 18 major works voids in June 2023.
72. **% 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. There are no national benchmarking figures available, as yet, however Leeds have released their results and they have a 67% satisfaction rate. Data for 2024-25 will be available in February 2025.

Consultation

73. Not applicable.

Options

74. Not applicable.

Analysis

75. Not applicable.

Council Plan

76. Not applicable.

Implications

77. 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.

Risk Management

78. 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.
79. The current financial position represents a significant risk to the Council's financial viability and therefore to ongoing service delivery. It is important to ensure that the mitigations and decisions outlined in this paper are delivered and that the overspend is reduced.

Recommendations

80. The Committee is asked to:
 - a. Note the finance and performance information.
 - b. Note that work will continue on identifying savings needed to fully mitigate the forecast overspend.

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

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Report Approved

Date 27/09/2024

Debbie Mitchell
Director of Finance

Report Approved

Date 27/09/2024

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

All

For further information please contact the author of the report

Background Papers: None.

Annexes: HHASC Q1 24-25 Scrutiny Committee Scorecard