

Report of the Director of Finance

2024/25 Finance and Performance Monitor 2

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 September 2024. This is the second 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 continued challenging financial position with a forecast overspend for 2024/25 of £2.7m which is a huge improvement on the c£11m forecast overspend we have previously seen at this stage in the financial year. There has also been an increase in the forecast for Adult Social Care, and the forecast also assumes we can release some earmarked reserves to offset the overall position.
3. However, this 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. As outlined in previous reports, the existing cost control measures remain in place, and further action is needed to bring spending down to an affordable level, 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.
6. The Council implemented a garden waste subscription scheme in August 2024 (this was charged on a pro-rata basis). In 2025, the garden waste subscription service will run for the full 40 week season for 40 weeks (operating from Monday 3rd March to Friday 5th December). The Council will contact subscribers early in the New Year to advise of the 2025 subscription fee and with instructions on how to purchase their licences. As this is before budget council it is necessary to agree the fee in advance. For the 2025/26 financial year, it is proposed that the charge for 2024/25 will be £49. This is expected to produce an additional £100k compared to the current fee which will support overall savings. The service also hope to expand the subscription scheme in 2025 to some new build housing estates that were never previously served by a kerbside garden waste collection service (e.g. Langley Gate development etc).
7. Local government continues to be in challenging times, with worsening performance in a number of sectors nationally. The majority of performance indicators chosen to support and monitor the Council Plan in York, continue to show a generally positive and stable trend against this difficult financial picture and shows the hard work from staff, partners and the city to tackle these challenges.
8. This set of indicators are the high-level measurable element of our performance framework, and in newly available data up to Q2 there has been positive performance in areas such as; **Health inequalities in wards** where we have seen further improvements in the expected level of development in children at 2-2.5 years, the number of **children in temporary accommodation** continues to be lower than previous years, our **building services indicators** continue to show a positive direction of travel with a high percentage of repairs completed on first visit alongside the low number of void properties and an increasing percentage of dwellings with an energy rating in the A-C band in the EPC register, and the **number of FOIs, EIRs, and Complaints** responded to in-time show positive performance at responding to customers in timely manner.
9. Alongside the Council plan indicators there are a number of areas of positive performance from across the Council. Nearly 39,000 eligible households in York have now subscribed to the new **Garden Waste Subscription scheme**, which is 55% of eligible households and above the

initial target of 33,000 households. The cities **Purple Flag Status** was renewed in Summer 2024, recognising the high standards in safety, diversity, cleanliness and vibrancy and recent **Tourism data** is very positive and shows that hotel room occupancy was 85% in July and footfall in the city centre was over 750,000 visits in August. The **Corporate Improvement Framework** which builds on existing strengths with a view to continuous improvement being central to how the council operates has shown recent positive trends in the continued reduced spend on agency staff, a high percentage of FOIs, EIRs, and Complaints responded to in-time, and a wide variety of ideas received in response to the new staff ideas system.

10. To support our most vulnerable residents we have been **Preparing for statutory inspections** such as any future CQC inspection of the Adult Social Care system in York. New performance management information has been made available to the service on waiting lists and timescales for assessments to help the service on its improvement journey, and there has been positive feedback from customers shown by the **low numbers of complaints** received in this area and improved **Joint working**, where there has been an increase this financial year in the number of people in receipt of adult social care packages that are jointly funded under Continuing Health Care or Vulnerable Person Unit provision by the NHS and CYC, to around 250 people.
11. **Population predictions** and data from POPPI/PANSI show that there is going to be a higher % of older people and individuals with learning needs in York in forthcoming years. In response to this and other challenges, City of York Council has agreed **Specialist housing for disabled adults or adults with learning disabilities** where 14 new homes in Acomb to meet the need for specialist housing for disabled adults or adults with learning disabilities in the community have been agreed, and a new **SEND Hub** for children and young people with special educational needs at Clifton Children's Centre was approved in September. The hub will bring together professionals from education, health and social care to provide families with advice and support, reducing unnecessary assessments and waiting times, and help to tackle the rising requests for EHCP assessments in York (188 in the first 5 months of 2024-25) and the number of children and young people with an EHCP (1,436 at the end of June 2024).
12. Over £2.4m has been secured to help fund a new 24/7 adults **Mental health hub** in York over the next two years, run by a team of NHS and volunteer staff, offering support with no referral required. This will help to tackle a number of areas; recent data shows a reduction in the number of

suicides in York in the most recent three-year period, compared to the previous period, and the overall number of households in temporary accommodation in York has reduced during 2023-24 with York continuing to perform positively compared to benchmarked authorities. **Childcare reforms** have been announced and a report was presented to Executive in September 2024 on the commissioning of new and expanded places for childcare reforms to help parents with early years childcare and provide more children with access to high quality early years education. In 2023, **KS4 data** showed strong performance for York pupils compared with national averages and a high proportion of 5 year olds achieved a good level of development compared to national and regional averages. However, challenges remain as the **gap between disadvantaged pupils** and their peers at KS4 widened in York and nationally, and a legacy of Covid-19 is that school attendance of disadvantaged groups continues to be slower to recover.

13. We are listening to residents within **Our Big Budget Conversation**, a consultation on budget priorities taking place over 4 stages during 2024-25 with stage 2 concluding at the end of Q2 with over 1000 responses. The annual **Tenant Satisfaction survey** was sent to all council tenants in September 2024, where over 7000 households have been asked about their views on services. York remains committed to improving stock condition and tenant experiences, and results from the 2023-24 Regulator for Social Housing return are due for publication on the York Open Data platform in November 2024.

Background

Financial Summary and Mitigation Strategy

14. The current forecast is that there will be an overspend of £2.7m. 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. Of particular concern, is the increase in forecast overspend across Adult Social Care, where the predicted outturn has increased by £2.4m. Paragraph 29 below outlines the actions being taken within the directorate to mitigate against this increased forecast overspend.
15. 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.

16. As outlined in previous reports to Executive, 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.
17. 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.
18. On 30th October, the Chancellor announced the first budget of the new Government. Whilst we will need to await the draft local government settlement in December for detailed allocations of any funding to York, there was a confirmation that there are plans to reform local authority funding (especially distribution) in 2026/27 "to ensure it reflects an up to date assessment of need and local revenues". This is both an opportunity and a risk to our medium term finances, given our position as one of the lowest funded councils in the country.
19. 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.
20. Corporate control measures are in place, but it is possible that they will not 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.

21. 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

22. 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. The latest forecasts indicate the Council is facing net financial pressures of £2.7m and an overview of this forecast, on a directorate by directorate basis, is outlined in Table 1 below.

Table 1: Finance overview

Service area	Net budget £'000	2024/25 Forecast Variation £'000
Children & Education	28,659	1,111
Adult Social Care & Integration	45,307	3,286
Transport, Environment & Planning	23,464	-610
Housing & Communities	6,614	790
Corporate & Central Services (includes Public Health)	44,648	-132
Sub Total	148,692	4,445
Contingency	576	-576
Use of earmarked reserves		-1,089
Total including contingency	149,268	2,780

Directorate Analysis

Adults

23. The projected outturn position for Adult Social Care is an overspend of £3,286k 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 £898k of previously agreed savings will be made by the end of the year.

	2024/25 Budget £'000	Forecast Outturn Variance £'000	Forecast Outturn Variance %
Direct Payments	4,841	5,781	119.4
Home and Day Support	2,844	1,078	37.9
Supported Living	15,689	2,650	16.8
Residential care	15,244	821	5.4
Nursing care	5,149	160	3.1
Short term placements	861	-132	-15.3
Staffing (mostly social work staff)	7,218	397	5.5
Contracts and Commissioning	2,353	-53	-2.2
In House Services	4,837	116	2.4
Be Independent & Equipment	982	459	46.7
Other	-14,650	-2,530	-17.3
Recharges	-61	14	23.0
Total Adult Social Care	45,307	3,286	7.2

24. The forecast position for Adult Social Care is an overspend of £3,286k. This is based on customer numbers and costs to the end of August. The projection assumes that agreed savings of £898k will be made by the end of the year. The forecast overspend has increased by £925k compared to Quarter 1.
25. The main reasons for this increased forecast are additional customers in Learning Disability Supported Living and Older People residential placements. There have also been increased homecare hours provided. In addition, it has been assumed that £1.2m of savings will now not be achieved in the current financial year.
26. ASC has received total growth of £7m in 2024/25. £2.8m of this growth has been allocated to external care budgets to cover demographic pressures, £1.4m 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 crystallised.

27. 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.
28. The projected overspend is largely due to the incomplete delivery of prior year savings targets carried through from previous years' budgets.
29. The directorate is taking the following action to improve the financial position;
 - 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.
 - 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.
 - 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.
 - 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.

- 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.

30. 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 (£1,204k overspend)

31. The main overspend is on the Learning Disability (LD) direct payments budget, which is expected to overspend by £1,191k. This is due to the average cost of a direct payment being £137 per week more than in the budget (£868k), and the average cost of transport for direct payment being £41 per week more than budget (£228k). In addition the average weekly health income received per customer is less £575 less than in the budget (£270k).
32. 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.

Home and Day Support (£1,078k overspend)

33. The Community Learning Disability budget is expected to overspend by £136k due to underachievement of Continuing Health Care (CHC) income (£266k), which is partially offset by additional S117 income and additional income from customers contributing to their care (-£101k).
34. The Community Learning Disability (LD) Transitions budget is expected to overspend by £120k due to an increase in the weekly costs compared to budget (£260k), which is offset by an increase in the weekly funding received from CHC and customers contributing to their own care (-£142k).

35. The Community Older People budget is expected to overspend by £515k largely due to the average homecare hours per week being 601 more than budget (£756k), offset by an increase in customer contributions being received (£247k). These figures include an additional contingency added for Springfield homecare customers (£200k). This was under-projected at Q1 as there has been a change in the way that invoices are processed which has meant delays in payments being made. This has brought the estimated cost of Springfield customers back in line with the amounts paid in 2023/24.
36. The Community Physical & Sensory Impairment (PSI) budget is expected to overspend by £245k, due to 2 more customers on exception contracts than in the budget (£101k) and a reduction of £311 in the average weekly health income being received per customer (£178k). This is offset by a lower than budgeted expenditure on day support (£16k).

Supported Living (£2,650k overspend)

37. 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.
38. The Learning Disability Supported Living budget is projected to overspend by £1,902k. The average cost of a placement is £124 per week more than in the budget (£1,201k), there are two more customers than budgeted for (£235k) and expenditure on voids is expected to be around £235k this year.
39. The Physical & Sensory Impairment Supported Living schemes budget is projected to overspend by £463k. This is due to the average cost of a placement being around £375 per week higher than in the budget (£959k), partially offset by having eight fewer customers in placement than assumed in the budget.
40. The Mental Health Supported Living schemes budget is projected to overspend by £289k. This is due to the average cost of a placement being around £195 per week higher than in the budget (£33k).

Residential care (£861k overspend)

41. The OP Residential Care budget is expected to overspend by £1,496k. There are 11 more customers than in the budget (£584k) and the average cost per customer is £144 per week higher (£2,062k). This is offset by 5 additional customers with S117 contributions (-£193k), an increase in the income received per S117 customer (-£78k), 20 more customers contributing to their costs of care (-£474k) and an increase in the average contributions received per customer of £35 per week (-£456k).
42. The MH Residential Care over 65 budget is expected to underspend by £358k. There are 3 less customers in placement (-£162k) and the average cost of care per customers is £385 per week less than in the budget (-£241k).
43. The MH Residential Care working age budget is expected to overspend by £187k. There is a decrease in the average weekly income received from S117 contributions which is £174 per week less than in budget (£299k). In addition there are two additional customers in placement (£160k), offset by a decrease in the weekly average cost per placement of £93 per week (£-273k).
44. The LD Residential Care over 65 budget is projected to underspend by £156k. This is due to having 2 fewer customers than assumed in the budget.
45. Additional Funding from the ASC Discharge fund will also be added into the Residential Care Budget (£-500k).

Nursing Care (£160k overspend)

46. LD Permanent Nursing Care budgets are projected to overspend by £194k, due to having 4 more customers in over 65 placements than assumed in the budget.
47. Mental Health Nursing Care budgets are expected to overspend by £243k. There are currently 3 more customers in placement than budgeted (£525k), partially offset by 3 more customers receiving health income (-£323k).
48. OP Permanent Nursing Care is projected to underspend by £412k. The average cost of a placement is £231 a week less than in the budget (-£1,377k), and there are two more customer receiving health contributions

(-£132k). This is offset by having two more customers in placement (£119k), a reduction in the average customer contributions received of £68 per week (£317k) and a reduction in the average health income received per customer of £550 a week (£574k).

49. The P&SI Nursing budget is expected to overspend by £135k, largely due to the average weekly cost per customer being higher than assumed in the budgeted.

In House Services and Staffing

50. 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 (£397k overspend)

51. 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 (£53k underspend)

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

Be Independent & Equipment (£459k overspend)

53. 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.
54. 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 £110k 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 £26k 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 (£30k). In addition, there is expected to be an underachievement of income based on current customer numbers (£21k) and the decision to end equipment sales (£48k).

In House Services (£116k overspend)

55. There are projected overspends at 22 The Avenue, Flaxman Avenue, and Yorkcraft. This is partially offset by the expected underspend on staffing in the PSS service due to vacancies and reduced use of agency staff.

Housing Services General Fund

56. The directorate is forecasting an underspend at quarter 2 of £10k and the table below summarises the latest forecasts by service area.

	2024/25 Budget £'000	Forecast Outturn Variance £'000	Forecast Outturn Variance %
Housing Services	-126	1	0.8
Healthy & Sustainable Homes	352	-11	-3.4
TOTAL	226	-10	-

57. Costs have been able to be contained within Housing General Fund although there have been additional funding from Homelessness Grants and Winter Pressures Grants that have eased cost pressures. These costs do not include losses on Temporary Accommodation that the council incurs due to loss of benefits. These are reported elsewhere in in the council's budgets.

Housing Revenue Account

58. 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).

	2024/25 Budget £'000	Forecast Outturn Variance £'000	Forecast Outturn Variance %
Repairs & Maintenance	10,867	0	0
General Management	7,790	-61	-1
Special Services	3,912	-240	-6
Other Expenditure	19,870	1,095	6
Dwelling rents	-37,933	100	0
Non-Dwelling Rents	-533	-32	-6
Charges for Services	-2,385	+208	+9
Other Income	-1,318	-1,005	-76
Total	270	65	+24
Debt Repayment	8,400	0	0
Revised Position	8,670	65	1

59. 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.
60. Across other expenditure there is a forecast increase in the depreciation charge (£700k) which provides the Major Repairs reserve. There is also an increase in interest costs following a loan being taken out in 2023/24 to fund Housing Delivery projects (£293k).
61. Rent incomes are reporting an overspend due to the lost income from the Bell Farm and Glen Lodge refurbishment schemes however the underlying position is an improvement over previous years due to less loss of income from void properties.
62. 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.
63. 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.

64. The HRA working balance position as at 31st March 2024 was £30.0m and the latest forecast balance at 31st March 2025 is estimated to reduce to £21.4m.

Public Health

65. Public Health (PH) is projected to underspend by £183k which will be transferred to the earmarked Public Health reserve. The remaining balance of the Public Health reserve will be £483k.

66. The table below provides a more detailed breakdown for the services within Public Health.

Service Area	Gross Budget £'000's	Net Budget £'000's	Outturn Variance £'000's	Comments
Domestic Abuse Grant	651	303	0	No variation
Public Health General	2,291	-290	-117	Staff funded through alternative grants, underspend on weight management programs, child health and dental
Substance Misuse	2,221	0	-6	Small underspend, residential budget unused
Sexual Health	1,832	0	10	Small overspend projected as current contracts extended
Health Trainer Service	768	0	-6	Staff recruited part way through year
Healthy Child Service	2,987	0	-64	Staffing vacancies, projection of team post recruitment
Total Public Health	10,396	13	-183	
Transfer to reserves			+183	
Final Public Health variation			0	

Public Health Grant Reserve	£000's
Opening Balance	+777
Less transfer from reserve to rebase PH budgets at the start of the financial year	-477
Forecast underspend transferring to reserve at year-end	+183
Balance to carry forward	+483

67. The Public Health budget is supported by a number of funding sources including:
- Public Health Grant
 - Supplemental Substance Misuse Treatment and Recovery Grant
 - Stop Smoking Services Grant
 - Health Inequalities Grant
 - Public Health Grant Reserves
68. **Domestic Abuse Grant.** In 24/25 £114k worth of safe accommodation contract will be funded from grant monies rather than previously dispersed corporate budget. In addition to this one-off saving, plans are in development to ensure any reserve balance related to this grant is reduced in a controlled manner. The Domestic Abuse Grant Reserve currently sits at £432k and there are plans in place to prudently reduce this balance over the next few years.
69. **Public Health General.** Plans to fill a senior role have reduced this underspend. In contrast, forecast underspends in weight management, child and maternal health and dental activity have increased.
70. **Substance Misuse.** The small underspend in this area is related to residential placements currently being unused.
71. **Sexual Health.** This overspend is related to the agreed continuation of the current contracts through the last three quarters of 24/25, LARC activity is also projected to be higher than budgeted for due to the ongoing commissioning to integrate sexual health services into one contract.
72. **Health Trainer Service.** The underspend in this area relates to staffing in the service. The team is now at establishment and small underspends are projected as a result of recruitment part way through the year.
73. **Healthy Child Service.** In the six months preceding the restructure of the HCS Team, there were several vacancies resulting in an underspend. The forecast includes the vacancies until the restructure and a projection based on recruitment to date.
74. **Public Health Reserve.** On 31st March 2024, the Public Health Reserve stood at £777k. £477k was drawn from the Public Health Grant Reserve to rebase starting budgets. The Q2 forecast of a £183k underspend against budgets will be transferred to the reserve at year end to support Public

Health spend in future years when the grant is unlikely to be enough to meet current commitments. Public Health have met and are expected to continue to meet inflationary and pay pressures from within its own resources without recourse to additional council growth.

Performance – Service Delivery

75. 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
76. 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.
77. 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						

78. **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.

79. **% 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	2023/24 data available in April 2025
Gap in years in Life Expectancy at birth for Males between highest and lowest York ward (5 year aggregated)	10.2 (2019/20)	11.7 (2020/21)	→	Annual	Not available	2023/24 data available in April 2025
Gap in years in Life Expectancy at birth for Females between highest and lowest York ward (5 year aggregated)	8.2 (2019/20)	11.1 (2020/21)	→	Annual	Not available	2023/24 data available in April 2025
Absolute gap in hospital admission ratio for self-harm between highest and lowest York ward (5 year aggregated)	133.2 (2019/20)	119.6 (2020/21)	→	Annual	Not available	2023/24 data available in April 2025
Absolute gap in hospital admission ratio for alcohol-related harm (narrow definition) between highest and lowest York ward (5 year aggregated)	70.7 (2017/18)	88.8 (2020/21)	→	Annual	Not available	2023/24 data available in April 2025
Absolute gap in % of children who reach expected level of development at 2-2.5 years of age between highest and lowest York ward (4 yr aggregated)	13.65% (2022/23)	10.53% (2023/24)	↓ Good	Annual	Not available	2024/25 data available in August 2025
Absolute gap in % of Year 6 recorded overweight (incl. obesity) between highest and lowest York ward (3 year aggregated)	24.40% (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)	38.98% (2022/23)	39.30% (2023/24)	→	Annual	Not available	2024/25 data available in August 2025

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All historic data is available via the Open Data Platform

80. **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 2024.

81. **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 2024.
82. **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 2024.
83. **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 children who reach expected level of development at 2-2.5 years of age between highest and lowest York ward (4 yr aggregated) - The value for this indicator for the 4 year period 2020-21 to 2023-24 was 10.53% (the difference between 95.95% in Haxby & Wiggington and 85.42% in Clifton). The latest value represents an improvement (a narrowing of the gap in York) compared with the previous values of 13.65% for 2019-20 to 2022-23 and 13.1% for 2018-19 to 2021-22.
 - Absolute gap in % of children totally or partially breastfeeding at 6-8 weeks between highest and lowest York ward (4 year aggregated ward data) - The value for this indicator for the 4 year period 2020-21 to 2023-24 was 39.3%% (the gap between 81% in Heworth Without and 41.7% in Westfield). There has been a widening of the gap from

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

Housing: Increasing the supply of affordable housing (City)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
Number of new affordable homes delivered in York	122 (2023/24)	49 (Q1 2024/25)	➡	Quarterly	Not available	Q2 2024/25 data available in November 2024
% of dwellings with energy rating in A-C band in the EPC Register - Snapshot	45.1% (Q1 2024/25)	45.3% (August 2024)	↑ Good	Monthly	National Data 2023/24 59.7% Regional Data 55.3%	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 November 2024
Number of people sleeping rough - local data - (Snapshot)	22 (Q1 2024/25)	20 (Q2 2024/25)	➡	Monthly	Not available	Q3 2024/25 data available in January 2025
HMO's as % of properties in York	NA	NA	➡	Annual	Not available	TBC

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84. **Number of new affordable homes delivered in York** – During 2024-25, it is expected that affordable housing completions will be significantly below the identified level of need. National scale challenges are facing many areas with buoyant housing markets such as a shortage of sites for affordable housing and labour and supply chain constraints, and these have affected delivery in York. The council itself is maximising delivery opportunities currently, and will access a range of funding opportunities for direct delivery in addition to securing over half of the total completions during 2024-25 through Section 106 planning agreements.
85. 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.

86. The new Government and Combined Authority have stated that housing supply, and affordable homes in particular, are amongst its key delivery priorities and the council will take advantage of new opportunities in this climate wherever possible. Data for the first half of 2024-25 will be available in November 2024.
87. **% of dwellings with energy rating in A-C band in the EPC register –** An Energy Performance Certificate (EPC) gives a property an energy efficiency rating from A (most efficient) to G (least efficient) and is valid for 10 years. Apart from a few exemptions, a building must have an EPC assessment when constructed, sold or let. Whilst the EPC register does not hold data for every property, it can be viewed as an indication of the general efficiency of homes. The rating is based on how a property uses and loses energy for example through heating, lighting, insulation, windows, water and energy sources. Each area is given a score which is then used to determine the A-G rating and a rating of A-C is generally considered to be good energy performance.
88. The % of properties on the register for York with an EPC rating of A-C at the end of August was 45.3%. This measure has increased incrementally month on month since CYC began reporting on the information 18 months ago when 42% of properties were rated A-C. The largest changes in York continue to be in the middle categories with around 3% less properties rated D-E and around 2.5% more rated C. Data is based on the last recorded certificate for 61,666 properties on the register for York, some of which will have been last assessed more than ten years ago. When looking at certificates added or renewed in the past year only for 2023-24, 58.5% of certificates were rated A-C for York compared to 59.7% Nationally and 55.3% Regionally.
89. **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.

90. **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.

91. 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).

92. **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.
93. 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.
94. 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.
95. **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 20 people sleeping rough in York in September 2024, which is a slight decrease from 22 people in September 2023.

Housing: Increasing the supply of affordable housing (Council)						
	Previous Data	Latest Data	DoT	Frequency	Benchmarks	Data Next Available
% of dwellings failing to meet the decent homes standard	1.60% (2022/23)	1.90% (2023/24)	➡	Annual	Not available	2024/25 data available in September 2025
% of Repairs completed on first visit	86.08% (Q1 2024/25)	86.6% (Q2 2024/25)	➡	Quarterly	Housemark Median 2022/23 86.02%	Q3 2024/25 data available in January 2025
Number of Void Properties - Standard Voids - (Snapshot)	59 (Q1 2024/25)	48 (Q2 2024/25)	⬇️ Good	Monthly	Not available	Q3 2024/25 data available in January 2025
Number of Void Properties - Major Works Voids - (Snapshot)	3 (Q1 2024/25)	1 (Q2 2024/25)	⬇️ Good	Monthly	Not available	Q3 2024/25 data available in January 2025
Number of Void Properties - Capital Projects Voids - (Snapshot)	19 (Q1 2024/25)	16 (Q2 2024/25)	➡	Monthly	Not available	Q3 2024/25 data available in January 2025
Number of Void Properties - Total Voids (Excludes Not Offerable) - (Snapshot)	81 (Q1 2024/25)	86 (Q2 2024/25)	➡	Monthly	Not available	Q3 2024/25 data available in January 2025
Number of Void Properties - Not Offerables - (Snapshot)	77 (Q1 2024/25)	79 (Q2 2024/25)	➡	Monthly	Not available	Q3 2024/25 data available in January 2025
% 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

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96. **% of dwellings failing to meet the decent homes standard –** 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. 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).
97. 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.
98. **% of repairs completed on first visit –** The percentage of repairs completed on the first visit was 86.6% in Q2 2024-25, which is the highest figure seen for a number of years.

99. **Number of void properties** – Numbers of standard void properties reduced throughout 2023-24 from 73 at the start of the year to 52 at the end of March 2024. Despite 2024-25 starting with 62 voids in April, the latest data for September 2024 shows a reduction to 48 properties. There was only 1 major works voids at the end of September 2024 which is a large decrease on the 6 major works voids in September 2023.
100. **% 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

101. Not applicable.

Options

102. Not applicable.

Analysis

103. Not applicable.

Council Plan

104. Not applicable.

Implications

105. 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

106. 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.
107. 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

108. 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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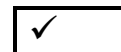
Report
Approved



Date 22/11/2024

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 Q2 24-25 Scrutiny Committee Scorecard