

CABINET Agenda

Date Monday 17th November 2025

Time 6.00 pm

Venue JR Clynes Building Second Floor - Room 2

- Notes
1. DECLARATIONS OF INTEREST- If a Member requires advice on any item involving a possible declaration of interest which could affect his/her ability to speak and/or vote he/she is advised to contact Alex Bougatef or Constitutional Services at least 24 hours in advance of the meeting.
 2. Further information relating to this meeting are available from Constitutional Services - email constitutional.services@oldham.gov.uk
 3. PUBLIC QUESTIONS - Any Member of the public wishing to ask a question at the above meeting can do so only if a written copy of the question is submitted to the contact officer by 12.00 noon on Wednesday, 12th November 2025.
 4. FILMING - The Council, members of the public and the press may record / film / photograph or broadcast this meeting when the public and the press are not lawfully excluded. Any member of the public who attends a meeting and objects to being filmed should advise the Constitutional Services Officer who will instruct that they are not included in the filming.

Please note that anyone using recording equipment both audio and visual will not be permitted to leave the equipment in the room where a private meeting is held.

MEMBERSHIP OF THE CABINET

Councillors M Ali, Brownridge, Dean, Goodwin, F Hussain, Jabbar, Mushtaq, Shah (Chair) and Taylor

Item No

1 Apologies For Absence

2 Urgent Business

Urgent business, if any, introduced by the Chair

3 Declarations of Interest

To Receive Declarations of Interest in any Contract or matter to be discussed at

the meeting.

4 Public Question Time

To receive Questions from the Public, in accordance with the Council's Constitution.

5 Minutes (Pages 5 - 14)

The Minutes of the meeting of the Cabinet held on 20th October 2025 are attached for approval.

6 Revenue Monitor and Capital Investment Programme 2025/26 Quarter 2 (Pages 15 - 48)

An update on the Council's 2025/26 forecast revenue budget position, the financial forecast of the Dedicated Schools Grant and the Housing Revenue Account, alongside the financial position of the capital programme.

7 Council Tax Reduction Scheme 2026/2027 (Pages 49 - 62)

Cabinet is requested to make a recommendation to Council, regarding the proposed Council Tax Reduction Scheme for 2026/27.

8 Contractual Arrangements - Azure Cloud Contract - Microsoft (Pages 63 - 70)

To consider a report that seeks approval to enter into a call-off contract with Microsoft to provide the ongoing use of Azure Cloud.

9 Spring Brook Capital Works (Pages 71 - 112)

A report seeking approval for a project that will offer additional places and enhance provision for pupils with additional needs, that are based within the Newbridge Trust.

10 Extension of Short Breaks Play and Leisure Activities from 1st April 2026 (Pages 113 - 116)

A report that seeks approval for the extension of the contract with the current provider of short breaks, play and leisure activities from 1st April 2026.

11 Change Partnership Programme delivery - Early Language Support for every child/Alternative Provision Specialist Taskforce: grant requirements (Pages 117 - 124)

A report that seeks approval to appoint/extend posts relating to grant funding allocated to Oldham in relation to the Change Partnership Programme and associated schemes.

12 Request for a Direct Award of the Domestic Property Disability Adaption Framework for the Provision of Level Access Showers and Shower over Baths

(Pages 125 - 144)

Report of the Director of Adult Social Services

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Present: Councillor Shah (in the Chair)
Councillors Brownridge, Dean, Goodwin, Jabbar and Taylor

1 **APOLOGIES FOR ABSENCE**

Apologies for absence were received from Councillors Mohon Ali, Fida Hussain and Mushtaq.

2 **URGENT BUSINESS**

The Chair advised that there was one item of urgent business (Pride in Place Impact Fund Grant Acceptance), which would be considered at item 13. The grounds for urgency being that a formal decision to accept the grant funding, referred to in the submitted report, was required prior to the next scheduled Cabinet meeting on 17th November.

The Chair added that agenda items 12 (and the associated confidential appendices at item 18) and 13, were exempt from the call-in process by virtue of Rule 14 of the Constitution, following consultation with the Chair of Place, Economic Growth and Environment Scrutiny Board.

3 **DECLARATIONS OF INTEREST**

There were no declarations of interest received.

4 **PUBLIC QUESTION TIME**

There were no public questions for this meeting of the Cabinet to consider.

5 **MINUTES**

Resolved:

That the minutes of the meeting of the Cabinet held on 22nd September 2025, be approved as a correct record.

6 **REVENUE MONITOR AND CAPITAL INVESTMENT
PROGRAMME 2025/26 - MONTH 5**

The Cabinet considered a report of the Director of Finance that provided members with an update, as at 31st August 2025 (Month 5), of the Council's 2025/26 forecast revenue budget position (detailed at Annex 1 to the report) alongside the financial position of the capital programme together with the revised capital programme 2025/26 to 2029/30 (detailed at Annex 2 to the report).

The forecast adverse position for 2025/26 at the end of Month 5 was estimated to be £23.209m (£20.822m at the end of Quarter 1 – 30th June 2025). The details within the revenue monitoring report for Month 5 followed on from the Quarter 1 report previously presented and outlined the general direction of travel for this financial year, highlighting any significant areas of concern which may not just impact on the current year, but also when preparing future budgets.

A forecast adverse position based on the Month 5 revenue controllable budget was £23.209m which was an unfavourable movement of £2.387m from the position previously reported. The increasing need for support of the Council's services from residents and businesses, the complexity of the support needed, and inflationary costs continue to put pressure on service budgets and is demonstrated by the Month 5 forecast outturn position. These pressures, in the main were driven by escalating costs in essential statutory services supporting the most vulnerable residents, reflecting the broader challenges the Council and numerous Councils across the country are facing. This is particularly acute in statutory and heavily inspected services where there is little flexibility to mitigate rising costs, for example increasing pressures on social care budgets due to the support needs of vulnerable children and complexity in the needs of adult requiring support.

There was also an increasing need to support children with Special Educational Needs (SEND) and whilst significant work has been done in the last 12 months, homelessness presentations and use of temporary accommodation is still of concern given the numbers accessing this service.

Since the last report was presented to the Cabinet, the Executive Team had implemented enhanced controls on expenditure with future revenue monitoring reports expected to show the positive impacts of these management actions. Details on these controls were included in Annex 1 to the submitted report. Given, the in-year financial position of the Council, the level of reserves available and the budgetary gaps already within the MTFS, the outcome of the Local Government Finance Settlement for 2026/27 and future years will have a significant influence on the financial sustainability of the Council and the Council's ability to set a balanced budget over the short term. The budget pressures the Council has faced in recent years cannot continue to be mitigated without significant action both to reduce projected spend in year and to reduce costs over years to come. Further details of mitigations underway were included at Annex 1 to the submitted report.

The Director of Finance's report outlined the most up to date capital spending position for 2025/26 to 2029/30 for approved schemes. The revised Capital Programme budget for 2025/26 is £122.222m at the close of Month 5. Actual expenditure to 31st August 2025 was £20.042m (16.4% of the forecast outturn).

Options/alternatives considered:

Options/Alternatives 1 was to agree the recommendations detailed in the submitted report.

Option 2 to not agree the recommendations and to propose alternative forecasts.

Option 1 was the preferred Option.

Resolved:

1. That the Cabinet notes the contents of the report.

2. That the Cabinet notes the forecast revenue position at the end of Month 5 at £23.209m with mitigations in place to reduce expenditure as detailed at Annex 1, to the submitted report.
3. That the Cabinet approves the revised Capital Programme for 2025/26 including the proposed virements and notes the forecast for the financial years to 2029/30 as at the end of Month 5 as outlined in Annex 2, to the submitted report.

7

SITES OF BIOLOGICAL IMPORTANCE UPDATE

The Cabinet considered a report of the Executive Director of Place (Deputy Chief Executive) which sought the designation of a new Site of Biological Importance (SBI) and to adopt changes which had occurred to other SBI boundaries within the borough.

Appendix 1, of the submitted report, provided a map of the new SBI (Ladcastle Heath) and maps of the other SBI boundary changes (in respect of Medlock Headwater and Strinesdale, Moorgate Quarry and Armit Road Lodge). These changes were outlined at Appendices 2 and 3, to the report, alongside details of the other SBIs reviewed.

The Greater Manchester Ecology Unit (GMEU) periodically survey SBI's across Greater Manchester as part of a continuous process and notifies the council when there are changes that need to be made to the designations. The submitted report outlined changes to SBIs from site surveys carried out by GMEU in 2022 (received 2025).

The report therefore seeks to designate a new Site of Biological Importance (SBI) – Ladcastle Heath and to adopt changes which have occurred to other SBI boundaries within the borough, as outlined in Appendices 1, 2 and 3.

Options/Alternatives considered:

Option 1 - To designate a new Site of Biological Importance (SBI) – Ladcastle Heath and to adopt changes which have occurred to other SBI boundaries within the borough, as outlined in Appendix 1, 2 and 3. The advantage of this option is that the SBI will be subject to the principles set out in National Planning Policy Framework (NPPF) to avoid, mitigate and as a last resort compensate any harm. It will also contribute to the GM Local Nature Recovery Strategy (LNRS) Target 1: To increase the amount of land designated for nature by 5,000ha by 2035, growing this from 11% to 15% of the city-region. There are no disadvantages to this option.

Option 2 – To not designate a new Site of Biological Importance (SBI) – Ladcastle Heath and to not adopt changes which have occurred to other SBI boundaries within the borough, as outlined in Appendix 1, 2 and 3. The disadvantage is that the new SBI and boundary additions will not have been designated and therefore the full extent of the SBI's may not be given due consideration under NPPF, Places for Everyone (PfE) and the Local Plan. This option would not contribute to the LNRS Target 1: To increase the amount of land designated for nature by

5,000ha by 2035, growing this from 11% to 15% of the city-region. There are no advantages to this option.
Option 1 is the preferred option.

Resolved:

That the Cabinet agrees to

1. To designate a new Site of Biological Importance (SBI) – Ladcastle Heath and adopt changes which have occurred to other SBI boundaries within the borough, as outlined in Appendix 1, 2 and 3; and to
2. Note the District Synopsis and District Fact Sheet.

8

TEMPORARY ACCOMMODATION PROCUREMENT EXERCISES - NIGHTLY-PAID AND EMERGENCY ACCOMMODATION

The Cabinet considered a report of the Director of Communities which advised that the Council has a statutory duty to house homeless households under the Housing Act 1996, as amended by the Homelessness Reduction Act 2017. Where prevention was not possible, and permanent housing couldn't be found in sufficient time, the Council was obliged to provide temporary accommodation, until households could be accommodated permanently.

The current arrangements in relation to key elements of temporary accommodation provision in Oldham were due to expire in the coming year, and required re-procuring, to ensure that the Council had adequate access to accommodation for homeless households.

Options/Alternatives considered:

Option 1: That a robust, transparent procurement and commissioning process is undertaken to procure the following:

- a. A new framework for nightly-paid temporary accommodation
 - b. The provision of short-term emergency provision for temporary accommodation, via a dynamic market notice.
- That framework and contract-award decision making responsibilities are delegated to the Deputy Chief Executive (Place), ensuring that the exercise and contract award are carried out in a timely fashion, in order to ensure that we have sufficient provision in place to meet our obligations around homelessness.

Option 2: That some or all of the above procurement exercises are not agreed. This would mean that the Council would have less access to appropriate short-term and temporary accommodation and may struggle to meet our statutory obligations.

Option 1 was the preferred Option.

Resolved that:

1. That a robust, transparent procurement and commissioning process is undertaken to procure the following:
 - a. A new framework for nightly-paid temporary accommodation

- b. The provision of short-term emergency provision for temporary accommodation, via a dynamic market notice
2. That framework and contract-award decision making responsibilities are delegated to the Deputy Chief Executive (Place).

9

EXTEND THE CONTRACT TERM FOR THE DELIVERY OF ACCOMMODATION BASED SERVICES

The Cabinet considered a report of the Director of Neighbourhoods which sought the extension of the contract term of each of the three contracts referenced in the confidential report at item 15, in accordance with the terms and conditions of each contract for the period 1st April 2026 to 31st March 2027

The Council is party to three separate contracts for the delivery of Accommodation Based Services. The initial term of each contract ended on 31st March 2025, and was subsequently extended to 31st March 2026, at the same time as responsibility and budget for these contracts passed from Adult Social Care to Housing needs. There was provision within each contract to extend the term for a further 12 months. The report therefore proposed enacting that extension.

Options/alternatives considered:

These are detailed in the confidential report, to be considered at item 15.

Resolved:

That the Cabinet will consider the confidential recommendations, detailed in the report, at agenda item 15.

10

APPROVAL OF GRANT FUNDING AGREEMENT WITH GMCA FOR THE PROVISION OF COMMUNITY ACCOMMODATION SERVICE

The Cabinet considered a report of the Director of Communities that sought approval to enter into a grant agreement with Greater Manchester Combined Authority (GMCA) to fund the continued delivery of the Community Accommodation Service Tier 3 2025/27 scheme. The scheme was a type of temporary accommodation for prison leavers who are open to His Majesty's Probation Service and would not otherwise be owed a statutory accommodation duty by a Local Authority. The initial 12 months' pilot which successfully launched across the region in July 2021 ensured subsequent multi-year grant funding to enable Greater Manchester Authorities to create a unique local authority led model for temporarily accommodating prison leavers.

Options/alternatives considered:

These are detailed in the confidential report, to be considered at item 16.

Resolved:

That the Cabinet will consider the confidential recommendations, detailed in the report, at agenda item 16.

The Cabinet considered a report of the Director of Public Health which sought to confirm the Council's position to finalise the move to an agency model for the Borough's leisure services delivery model, and approving the necessary contractual modifications, including an updated Deed of Variation with Oldham Active (Oldham Community Leisure)

Options/alternatives considered:

These are detailed in the confidential report, to be considered at item 17.

Resolved:

That the Cabinet will consider the confidential recommendations, detailed in the report, at agenda item 17.

PROPERTY ACQUISITION - OLDHAM TOWN CENTRE

The Cabinet considered a report that sought approval for the acquisition and demolition of a property on Yorkshire Street, Oldham to support the wider regeneration of the area and the continued creation of a cultural quarter in this part of the town centre. Details of the property were noted in part B of this report (item 18), while legal, commercial and financial negotiations were in flight. The details of the acquisition were soon to be made public domain but could not be shared publicly at the present time.

Options/alternatives considered:

These are detailed in the confidential report, to be considered at item 18.

Resolved:

That the Cabinet will consider the confidential recommendations, detailed in the report, at agenda item 18.

PRIDE IN PLACE IMPACT FUND GRANT ACCEPTANCE

The Cabinet considered a report of the Executive Director of Place/Deputy Chief Executive which sought approval and acceptance of £1,500,000 Pride in Place Impact Fund capital grant allocation, from the Ministry of Housing, Communities and Local Government (MHCLG) in September 2025 as part of the 2025 Spending Review.

Oldham had been allocated £1,500,000 capital from the Pride in Place Impact Fund from MHCLG to be spent over 2025/26 and 2026/27. The Pride in Place Impact Fund will cover the following objectives:

- a. Community spaces: creating, extending, improving or refurbishing existing community facilities and enabling community organisations to take control or ownership of underused but valued local assets.
- b. Public spaces: enhancing the physical environment in public spaces - examples of initiatives include new or improved green

spaces or public squares, improved outdoor play, sports and leisure spaces, installing street furniture, public art or wayfinding.

c. High street and town centre revitalisation: making these areas more attractive and welcoming places where people congregate and which encourage economic activity. Examples of initiatives that could be funded are shop frontage improvements, adaptations that bring premises back into use, streetscape improvements, public art, trails and wayfinding, and creating or improving the infrastructure for regular markets.

Resolved:

1. That the Cabinet approves the acceptance of the £1,500,000 capital Pride in Place Impact Fund from MHCLG and undertaken the following objectives:
 - A. Community spaces: creating, extending, improving or refurbishing existing community facilities and enabling community organisations to take control or ownership of underused but valued local assets.
 - B. Public spaces: enhancing the physical environment in public spaces - examples of initiatives include new or improved green spaces or public squares, improved outdoor play, sports and leisure spaces, installing street furniture, public art or wayfinding.
 - C. High street and town centre revitalisation: making these areas more attractive and welcoming places where people congregate and which encourage economic activity. Examples of initiatives that could be funded are shop frontage improvements, adaptations that bring premises back into use, streetscape improvements, public art, trails and wayfinding, and creating or improving the infrastructure for regular markets.
2. That the Cabinet notes that MHCLG has issued a Memorandum of Understanding (MoU), which has been reviewed by the Council 's financial services.
3. That the Cabinet agrees to delegate authority to the Executive Director of Place (Deputy Chief Executive) to agree the terms of the MoU issued by MHCLG and any funding agreement in respect of the grant award in consultation with the Directors of Finance and Legal Services and approve appointments of professional teams and contract award in respect of the agreed budget.
4. That the Cabinet agrees to delegate authority to Director of Finance, or Chief Executive, to finalise and enter into the MoU issued by MHCLG and any funding agreement in respect of the grant award subject to the completion of any necessary due diligence on subsidy control compliance and authority to agree and complete any project change requests under the MOU and/or funding agreement.
5. That the Cabinet agrees to delegate authority to the Director of Legal Services or their nominee to formalise any necessary legal requirements including signing

and/or sealing any documentation referred to and/or required to give effect to the recommendations and/or delegations in this report and authority to approve the appointment of external legal advisers if required to protect the Council's interests and give effect to the recommendations in this report.

6. That the Cabinet agrees to delegate authority to the Director of Economy or their nominated representative to agree monitoring and evaluation of defined outputs and negotiations thereupon as required over the grant delivery period of 2025/26 and 2026/27.
7. That the Cabinet notes and endorses that the internal governance and administration for the MHCLG grant will be performed via the Creating a Better Place Programme Board (CaPB) structures.
8. That the Cabinet notes that the Chair of the Place, Economic Growth and Environment Scrutiny Board, had agreed for this item to be considered at this meeting on grounds of urgency, namely due to the need to make a decision to accept the grant funding before the next scheduled meeting of the Cabinet on 17th November 2025 and that he has exempted this item from call-in by virtue of Rule 14 of the Constitution.

14

EXCLUSION OF THE PRESS AND PUBLIC

That in accordance with Section 100A(4) of the Local Government Act 1972, the press and public be excluded from the meeting, for the following four items of business, on the grounds that they contain exempt information under paragraph 3 Part 1 of Schedule 12A of the Act, and it would not, on balance, be in the public interest to disclose the reports.

15

EXTEND THE CONTRACT TERM FOR DELIVERY OF ACCOMMODATION BASED SERVICES

The Cabinet considered the commercially sensitive information in relation to agenda item 9 'Extend the Contract Term for Delivery of Accommodation Based Services'.

Resolved:

1. That Cabinet approves a one-year extension to the contract term in respect of those contracts referenced in the submitted report, each of which relates to the delivery of Accommodation Based Services, noting that this is within the delegated authority of the Director of Adult Social Services in consultation with the Lead Member for Adult Health and Social Care
2. That Cabinet approves the transfer of delegated authority relating to these contracts from the Director of Adult Social Services (in consultation with the Lead Member for Adult Health and Social Care) to the Deputy Chief Executive (Place), in consultation with the Cabinet Member for Neighbourhoods. This is in recognition of the previous transfer of these contracts from Adult Social Care to Housing Needs.

16

APPROVAL OF GRANT FUNDING AGREEMENT WITH

GMCA FOR THE PROVISION OF COMMUNITY ACCOMMODATION SERVICE



The Cabinet considered the commercially sensitive information in relation to agenda item 10 'Approval of Grant Funding Agreement with GMCA for the provision of Community Accommodation Service'.

Resolved:

That the Cabinet authorises Oldham Borough Council to agree and enter into a grant agreement with Greater Manchester Combined Authority for the continued delivery of the service captured in the grant agreement namely CAS-3, as outlined in the submitted report.

17

OLDHAM ACTIVE - AGENCY MODEL

The Cabinet considered the commercially sensitive information in relation to agenda item 11 'Oldham Active – Agency Model'.

Resolved:

1. That the Cabinet approves the work and transition to an agency model for the delivery of leisure services in Oldham.
2. That the Cabinet authorises officers to finalise and enters into a Deed of Variation with Oldham Active to reflect the agency model.
3. That the Cabinet delegates authority to the Cabinet Member for Culture and Leisure in consultation with the Director of Public Health, the Director of Finance, and the Director of Legal to approve and execute the Deed of Variation.
4. That the Cabinet notes that the new agency model will allow the Council and OCL to explore long term options for the delivery of leisure services in the borough such as Teckal/LATCo company model when the current contract ends (March 2028 or earlier).

18

PROPERTY ACQUISITION - OLDHAM TOWN CENTRE

The Cabinet considered the commercially sensitive information in relation to agenda item 12 'Property Acquisition – Oldham Town Centre'.

Resolved:

1. That the Cabinet approves the acquisition of the long leasehold interest (777 years remaining) of former Harry's Bar, Yorkshire Street, Oldham.
2. That the Cabinet approves the demolition of the building following acquisition.
3. That the Cabinet approves the creation of a new public square on the cleared site to improve the setting and visibility of the Oldham Coliseum Theatre.
4. That the Cabinet delegates authority to the Executive Director of Place/Deputy Chief Executive, Place, in consultation with the Section 151 Officer and the Cabinet Member for Growth, to finalise negotiations, legal

documentation, demolition, and delivery of the public realm scheme.

5. That the Cabinet notes that the Chair of the Place, Economic Growth and Environment Scrutiny Board has exempted this item from Call-in by virtue of Rule 14 of the Council's Constitution.



The meeting started at 6.00pm and ended at 6.25pm



Report to Cabinet

Revenue Monitor and Capital Investment Programme 2025/26 Quarter 2 – September 2025

Portfolio Holder: Councillor Abdul Jabbar MBE, Deputy Leader and Cabinet Member for Finance, Corporate Services and Sustainability

Officer Contact: Lee Walsh, Director of Finance

Report Author: Vickie Lambert, Finance Manager

17 November 2025

Reason for Decision

The report provides Cabinet with an update as at 30 September 2025 (Quarter 2) of the Council's 2025/26 forecast revenue budget position, the financial forecast of the Dedicated Schools Grant and the Housing Revenue Account (at Annex 1) alongside the financial position of the capital programme together with the revised capital programme 2025/26 to 2029/30 (at Annex 2).

Executive Summary

Revenue Position

The forecast adverse position for 2025/26 at the end of Quarter 2 is estimated to be £21.094m (£23.209m at the end of Month 5).

The details within this revenue monitoring report for Quarter 2 follows on from the Month 5 report previously presented and highlights any significant areas of concern which may not just impact on the current year, but also when preparing future budgets. A forecast adverse position based on the Quarter 2 revenue controllable budget is £21.094m which is a favourable movement of £2.115m from the position previously reported.

The increasing need for support of the Council's services from residents and businesses, the complexity of the support needed, and inflationary costs continue to put pressure on service budgets and is demonstrated by the forecast outturn position reported at the end of Quarter 2. These pressures, in the main driven by escalating costs in essential statutory services supporting the most vulnerable residents, reflects the broader challenges the Council and numerous Councils across the country are facing. This is particularly acute in statutory and heavily inspected services where there is little flexibility to mitigate rising costs, for example increasing pressures on social care budgets due to the support needs of

vulnerable children and complexity in the needs of adult requiring support. There is also an increasing need to support children with Special Educational Needs (SEND) and whilst significant work has been done in the last 12 months, homelessness presentations and use of temporary accommodation is still of concern given the numbers accessing this service.

Since the last report was presented to this meeting, the implementation of the agreed enhanced controls has started to have an impact on the forecast position resulting in the favourable movement between periods. As these controls are further embedded it is expected that the position will continue to improve. It is important that the organisation continues its work on mitigating and reducing the forecast revenue variance by the end of the financial year, limiting any unbudgeted use of reserves and protecting its financial resilience.

Given, the in-year financial position of the Council, the level of reserves available and the budgetary gaps already within the MTFs, the upcoming Policy Statement and the outcome of the Local Government Finance Settlement for 2026/27 onwards will have a significant influence on the financial sustainability of the Council and the Council's ability to set a balanced budget over the short term. The budget pressures the Council has faced in recent years cannot continue to be mitigated without significant action both to reduce projected spend in year and to reduce costs over the years to come. Further details of mitigations underway is included at Annex 1.

Information on the forecast year end position of the Dedicated Schools Grant (DSG), and Housing Revenue Account (HRA) are also outlined in the report.

Capital Position

The report outlines the most up to date capital spending position for 2025/26 to 2029/30 for approved schemes. The revised Capital Programme budget for 2025/26 is £122.248m at the close of Quarter 2. Actual expenditure to 30 September 2025 was £25.973m (21.2% of the forecast outturn).

Recommendations

That Cabinet:

1. Notes the contents of the report.
2. Notes the forecast revenue position at the end of Quarter 2 at £21.094m with mitigations in place to reduce expenditure as detailed at Annex 1.
3. Notes the forecast positions for the Dedicated Schools Grant and Housing Revenue Account.
4. Approves the revised Capital Programme for 2025/26 including the proposed virements and notes the forecast for the financial years to 2029/30 as at the end of Quarter 2 as outlined in Annex 2.

Revenue Monitor and Capital Investment Programme 2025/26 Quarter 2 – September 2025**1 Background**

- 1.1 The Authority's 2025/26 revenue budget was approved by Council on 6 March 2025 at a sum of £322.928m to be met by Government grants, Council Tax and Business Rates. This report sets out the updated revenue financial position at the end of Quarter 2.
- 1.2 As the year progresses the monthly and outturn projections will reflect the evolving position of the impact of management actions put in place to mitigate in-year pressures, new developments and changes in the profile of planned expenditure and any additional grants that are announced from the Government.

2 Current Position

- 2.1 This revenue monitoring report for the period to the end of September 2025 highlights significant areas of concern which may not just impact on the current year, but also when preparing future budgets. A projected adverse position based on the Quarter 2 controllable budget is £21.094m, which is a favourable movement of £2.115m from the position previously reported. Close financial management continues at all levels of the organisation with early actions having been undertaken by the Executive Team to mitigate this position and to ensure that there is minimal impact on setting the budget for 2026/27 and limit any unbudgeted use of general revenue reserves.
- 2.2 The main areas of concern identified within this monitoring report are:
- Adult Social Care with a forecast unfavourable position for the reporting period of £10.745m,
 - Children's Services with an estimated adverse position of £5.308m; and
 - Place with a forecast adverse position of £5.578m.
- 2.3 As detailed within the previous monitoring report presented to this meeting, enhanced spending controls across recruitment and expenditure were implemented by Senior Leaders as a response to the significant adverse variances that have been reported this financial year. The impacts of these actions to date are included within this revenue forecast position and have had a positive impact on the adverse variance reported. The Council must continue its efforts to reduce the forecast variance by the year end to mitigate any potential impact on the 2026/27 budget.
- 2.4 The Local Government Act 1988 specifies that a Local Authority must set and maintain a balanced budget. Failure to do so results in the Council's Section 151 officer having to issue a Section 114 notice to indicate that a Council's forecast income is insufficient to meet its forecast expenditure for that year.
- 2.5 Where Local Authorities are unable to finance their day to day to expenditure and before a Council issues a Section 114 notice, Government can provide temporary assistance by way of Exceptional Financial Support (EFS). EFS is temporary financial assistance provided by the government to Councils that are facing severe financial difficulties.
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- 2.6 The Council eagerly awaits the Policy Statement from Government on the Settlement and the full Settlement itself which is due by the end of the calendar year. Meanwhile, the Council is undertaking an assessment of the likely gap based on current and projected demand and costs in order to determine any possible requirement for support.
- 2.7 The in-year deficit forecast position for the Dedicated Schools Grant at the end of Quarter 2 is £10.048m, which is an adverse movement of £1.414m compared to the position reported at Quarter 1. This would reduce to an overall deficit by the close of the financial year of £8.886m after the application of the DSG surplus at £1.182m held within usable reserves. Details of this position are included within the report.
- 2.8 The Housing Revenue Account forecast shows a projected drawdown from the HRA reserve at the financial year end of £0.477m, with further details included in Annex 1.
- 2.9 The original Capital Programme for 2025/26 totalled £108.501m. The revised capital programme as at Quarter 2 taking into account any approved carry forwards, approved new funding, new schemes and variations and proposed variations/ re-phasing gives projected revised expenditure of £122.248m. Actual expenditure at the end of Quarter 2 was £25.973m (21.2% of the forecast outturn). Further details of expenditure and schemes within the capital programme can be found in Annex 2.
- 2.10 The Annual Review of the capital programme will be undertaken during this financial year. This is likely to lead to further reprofiling of planned expenditure and the realignment of capital resources between schemes. Its findings and recommendations will be detailed within a future report.

3 Options/Alternatives

- 3.1 The options that Cabinet might consider in relation to the contents of this report are;
- a) agree the recommendations
 - b) to not agree the recommendations and propose alternative forecasts

4 Preferred Option

- 4.1 The preferred option is that the Committee considers the forecasts and changes within this report; option (a) at 3.1.

5 Consultation

- 5.1 Consultation with the services within the Council and the Director of Finance.

6 Financial Implications

- 6.1 The full financial implications are detailed in the report.

7 Legal Services Comments

- 7.1 There are no legal issues at this time.

8 Co-operative Agenda

- 8.1 Improving the quality and timeliness of the financial information available to citizens of Oldham supports the co-operative ethos of the Council.
- 8.2 The revenue budget and capital strategy/ programme have been prepared so that they embrace the Council's co-operative agenda with resources being directed towards projects that enhance the aims, objectives and co-operative ethos of the Council. Ongoing budget monitoring is key to ensuring this objective is met.

9 Human Resources Comments

- 9.1 There are no Human Resource implications.

10 Risk Assessments

- 10.1 The risk is that the proposed management actions are not achieved in full. Should this be the case then alternatives will be sought and implemented.

11 IT Implications

- 11.1 There are no IT implications.

12 Property Implications

- 12.1 There are no Property implications.

13 Procurement Implications

- 13.1 There are no Procurement implications.

14 Environmental and Health & Safety Implications

- 14.1 There are no Environmental and Health and Safety implications.

15 Equality, Community Cohesion and Crime Implications

- 15.1 There are no Equality, Community Cohesion and Crime implications.

16 Implications for Children and Young People

- 16.1 There are no direct implications for Children and Young People

17 Equality Impact Assessment Completed

- 17.1 An equality impact assessment has been included at Annex 3.

18 Key Decision

- 18.1 Yes

19 Key Decision Reference

19.1 FCR-10-25

20 Background Papers

20.1 The following is a list of background papers on which this report is based in accordance with the requirements of Section 100(1) of the Local Government Act 1972. It does not include documents which would disclose exempt or confidential information as defined by the Act:

File Ref: Revenue Background Papers are contained in Annex 1 including, Appendices 1

Officer Name: Lee Walsh and Vickie Lambert

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File Ref: Capital Background Papers are contained in Annex 2 including Appendices A to I

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REVENUE BUDGET MONITORING REPORT 2025/26

Quarter 2 – September 2025

1 Background

- 1.1 The Authority's 2025/26 revenue budget was approved by Council on 6 March 2025 at a sum of £322.928m to be met by Government grants, Council Tax and Business Rates. This report sets out the updated revenue financial position at the end of Quarter 2.
- 1.2 Under established budget procedures all services are required to monitor and review their approved budgets during the financial year. As part of this process, a forecast of the year-end position has been prepared by all services. The services forecasts include all known commitments, issues, and any planned management actions required.

2 Current Position

- 2.1 The current net controllable revenue budget of £324.012m which is a £1.084m movement from the previously reported period (£322.928m). This change is due to the receipt of additional unringfenced Government Grants as detailed in the table below:

Movement in Funding	£000
Family Hubs and Start for Life Programme	(691)
Individual Placement and Support Grant	(155)
Leaving Care Allowance Grant	(39)
Rough Sleeping Grants	(168)
Public Health Grant - uplift	(31)
Net Movement in Funding	(1,084)

- 2.2 The details within this revenue monitoring report for Quarter 2 follows on from the Month 5 report previously presented and highlights any significant areas of concern which may not just impact on the current year, but also when preparing future budgets. The Quarter 2 forecast position shows a favourable movement of £2.115m from the position previously reported result is an estimated adverse position of £21.094m. A projected outturn position at this level demonstrates that the close financial management that has been undertaken thus far is to be continued throughout 2025/26 considering the budget gap in the Medium Term Financial Strategy for 2026/27 and 2027/28 and the limited Earmarked Reserves available.
- 2.3 As detailed within the previous monitoring report presented to this meeting, enhanced spending controls across recruitment and expenditure were implemented by Senior Leaders as a response to the significant adverse variances that have been reported this financial year. The impacts of these actions to date are included within this revenue forecast position and have had a positive impact on the adverse variance.

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- 2.4 The effectiveness of these management actions will continue to be closely monitored by the Executive Team throughout the financial year. As the forecast adverse position at the end of Quarter 2 remains at a significant level, further management actions will continue to be explored to mitigate the pressures being reported if this position does not improve further. Any further management actions implemented will be reported to Members through the regular financial monitoring reports submitted to Cabinet during the remainder of this financial year.
- 2.5 The Local Government Act 1988 specifies that a Local Authority must set and maintain a balanced budget. Failure to do so results in the Council's Section 151 officer having to issue a Section 114 notice to indicate that a Council's forecast income is insufficient to meet its forecast expenditure for that year.
- 2.6 Where Local Authorities are unable to finance their day to day to expenditure and before a Council issues a Section 114 notice, Government can provide temporary assistance by way of Exceptional Financial Support (EFS). EFS is temporary financial assistance provided by the government to Councils that are facing severe financial difficulties. This support, which is not additional revenue funding provided by Government, is typically used to help a Council meet its financial obligations, continue to deliver essential services and avoid the need to issue a 'Section 114'.
- 2.7 As mentioned in the Month 5 report, in recent years there has been an increase in the number of Councils being awarded EFS. EFS is a temporary assistance mechanism and does have ongoing implications, including enhanced monitoring requirements for Councils and should only be entered into when absolutely necessary. The Council is not yet making an application for EFS and awaits the Policy Statement on the settlement from the Government and the final Settlement itself, before exploring support available to Local Authorities.
- 2.8 At the time of writing, the publication of the Policy Statement for the Local Government Finance Settlement 2026/27, which will include the outcomes of the Fair Funding Review 2.0 Consultation, has been moved onwards and is now expected to be delivered at the end of November and potentially after "budget week" which is 24-28 November, with the actual Settlement expected week commencing 15 December.
- 2.9 The forecast revenue position at the end of Quarter 2 is detailed in the table below. Demand for Council services with increased complexity of need continues to have an impact on the projected position despite the work previously undertaken across the organisation to mitigate. Officers are continuing to seek out and implement additional actions wherever possible to reduce this gap further with service mitigations detailed within this report. These mitigations will be monitored regularly with an expectation that this work will continue to reduce the overall revenue adverse position for this financial year. Non-delivery of these mitigations would have an impact on the budget gap for the 2026/27 financial year and the level of general revenue Earmarked Reserves and therefore the overall financial resilience of the Council and should be avoided.
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Table 1 – Summary of Quarter 2 Forecast Revenue Budget Position

Directorate	Annual Budget £000	Annual Forecast £000	Annual Variance reported at Quarter 2 £000	Annual Variance reported at Month 5 £000	Change in Variance between periods £000
Adult Social Care	82,691	93,436	10,745	12,191	(1,446)
Children's Services	86,189	91,498	5,308	5,266	43
Public Health	23,703	23,534	(169)	(228)	59
Place	73,286	78,865	5,578	5,921	(343)
Resources	33,457	33,087	(370)	59	(429)
Capital, Treasury and Technical Accounting	24,686	24,686	-	-	-
NET EXPENDITURE	324,012	345,106	21,094	23,209	(2,115)
Financed By:					
Locally Generated Income	(181,158)	(181,158)	-	-	-
Government Grants	(143,884)	(143,884)	-	-	-
Collection Fund Deficit	1,030	1,030	-	-	-
TOTAL FINANCING	(324,012)	(324,012)	-	-	-
OVERALL PROJECTED VARIANCE	-	21,094	21,094	23,209	(2,115)

Significant revenue variances by Directorate

Table 2 – Summary of Quarter 2 Revenue budget variance analysis

- 2.10 There are significant variances contained within the projected net adverse position and a breakdown of these across type of variance is shown below.

Directorate	Non-Delivery of Savings (Red & Amber) £000	Expenditure Variance £000	Income Variance £000	Annual Variance reported at Quarter 2 £000
Adult Social Care	3,107	6,900	738	10,745
Children's Services	3,075	2,771	(538)	5,308
Public Health	-	(150)	(19)	(169)
Place	385	2,090	3,103	5,578
Resources	101	4,229	(4,700)	(370)
NET EXPENDITURE	6,668	15,840	(1,414)	21,094

2.11 As reported over the last two financial years, there are three areas which continue to forecast significant pressures;

- Adult Social Care is reporting a pressure of £10.745m at the end of Quarter 2 (£12.191m at the end of Month 5).
- Children's Services is reporting a pressure at the end of Quarter 2 at £5.308m (£5.266m at the end of Month 5).
- Place is reporting a pressure of £5.578m at the end of Quarter 2 (£5.921m at the end of Month 5).

2.12 Approved at Budget Council in March 2025, significant growth was added to the revenue base budget at £43.185m of which Adult Social Care was allocated £15.264m (35%) and Children's Services was allocated £16.831m (39%). At the same Council meeting budget savings were approved across all Directorates. When these savings are applied, the overall net increase was £6.776m for Adult Social Care and £13.170m for Children's Services.

Adult Social Care adverse variance at the end of Quarter 2 at £10.745m (Month 5 at £12.191m)

2.13 As shown at Table 2, the forecast adverse position for this directorate can be broken down as follows:

- | | |
|--|---------|
| • Non- Delivery of Budget Reductions (Red and Amber) | £3.107m |
| • Expenditure Variance | £6.900m |
| • Income Variance | £0.738m |

Further details for the expenditure and income variances are included in the following paragraphs, with details on budget reductions included at Section 3.

2.14 The Community Health and Adult Social Care service is reporting significant pressures forecast to be £5.326m at the end of this reporting period (£5.307m at the end of Month 5). These pressures predominantly relate to clients with physical disabilities accessing care at home (£2.346m), short stays following a hospital stay (£0.804m), costs for supported living placements (£0.668m), clients with nursing placements (£0.471m), clients with residential placements (£0.729m) and under-recovery of contributions (£0.069m).

2.15 The Learning Disability service is reporting an unfavourable a year end forecast of £3.213m at the end of Quarter 2 (£3.531m at the end of Month 5). The largest contributing areas to this estimated position are Care at Home which is an adverse position of £1.393m with £1.503m for Supported Living. There is a pressure against the available budget for residential care at £0.529m and direct payments at £0.111m with other smaller variances across this divisional area.

2.16 The Mental Health service is reporting an estimated adverse position of £1.677m by the end of the financial year as reported in month 6 compared to 1.095m at the close of Month 5. The costs for Supported Living being the largest contributing factor to this position which is estimated to be £1.453m. There are other smaller variances for nursing and short stay

placements which drive the overall position and which are being offset by favourable variances due to vacant posts and additional income across this service area.

2.17 While activity levels across the Directorate have remained broadly consistent with the previous year, costs continue to rise. This is driven by:

- Increasing complexity of care packages
- Constrained availability within the care market
- A growing number of double-cover care packages, particularly for those supporting hospital discharges

2.18 These trends indicate a higher level of acuity among individuals requiring care.

Adult Social Care – Planned Mitigations

2.19 There are planned mitigations that are in the process of being developed and / or embedded to reduce the forecast adverse position for this directorate. A summary of these are as follows:

- Client Finance project focusing on clearing backlogs, timely assessments and improved income recovery.
- Optimise Oldham Total Care and MioCare provision by utilising internal bed base to repatriate clients back to the borough.
- Review of short stay provision to ensure timely assessments are completed for people discharged from hospital and to reduce those in temporary care placements for extended periods of time.
- The Transitions Hub is now in place and actively working with young adults. Additionally, an ASC based Transitions team has been created.
- Develop an Assistive Technology offer to support care provision and enhance digitalisation.
- Review the provision for Learning Disability & Mental Health placements including future proofing through the capacity and demand work programme.
- Engagement of additional temporary resource to clear significant assessment backlog with expected benefits to be realised from Quarter 3.

2.20 Work continues to implement planned mitigations, and it is expected that these will have a positive impact on the adverse variance with the expected unfavourable position to be reduced by the end of Quarter 3. The pace of implementation needs to be continued to ensure this position can be mitigated as much as possible by the end of the financial year. It should be noted that the complexity of need for clients accessing this statutory service remains high and whilst the directorate is working hard to reduce this adverse variance, other factors such as demand and need could impact future forecasts.

Children's Services adverse variance at the end of Quarter 2 at £5.308m (£5.266m at the end of August 2025)

2.21 The forecast unfavourable position for this directorate area as at the end of September 2025 can be broken down as follows:

-
- Non- Delivery of Budget Reductions (Red and Amber) £3.075m
 - Expenditure Variance £2.771m
 - Income Variance (£0.538m)

Further details for the expenditure and income variances are included in the following paragraphs, with details on budget reductions included later within this report.

2.22 Children's Services are reporting a £5.308m forecast adverse variance for the financial year as at the end of September 2025 of which £3.075m is due to the non-delivery of budget reductions, namely the Children's Investment Plan (£2.852m).

2.23 The remaining pressure is mainly due to additional costs for Children with Disabilities short breaks, additional legal costs and the loss of Continuing Health Care (CHC) income due to the change in cohort and those children who are eligible for this funding. Pressures are being mitigated by slippage on vacant posts across the division.

Children's Services – Planned Mitigations

2.24 There are planned mitigations that are in the process of being developed and / or embedded to reduce the forecast unfavourable position for this directorate. A summary of these are as follows:

- Continued work on reducing agency staffing engagements
- Continued review of placements particularly for those that are high cost
- Placements review for the Children with Disabilities service
- Service review of legal fee commitments
- Review of School insurance contract to mitigate emerging issue
- Looking at areas where income can be maximised wherever possible
- Progression of charging policy
- Reviewing operating model for the Music Service

Public Health favourable variance of (£0.169m) as at the end of Quarter 2 ((£0.228m) at the end of Month 5)

2.25 Public Health is projecting a favourable position by the financial year end of £0.169m. This position is due to vacancies held across Public Health and Leisure services.

Place Directorate is reporting adverse variance by year end of £5.578m (£5.921m at the end of Month 5) as at the end of September 2025

2.26 The forecast unfavourable position for this directorate area as at the end of Quarter 2 can be broken down as follows:

- Non- Delivery of Budget Reductions (Red and Amber) £0.385m
 - Expenditure Variance £2.090m
 - Income Variance £3.103m
-

Further details for the expenditure and income variances are included in the following paragraphs, with details on budget reductions included later within this report.

Environment

- 2.27 The Environment service area is forecast to be in an adverse position of £2.274m (£2.304m as reported at the end of Month 5) by the financial year end. Expenditure pressures across the division for staffing costs including agency and additional fleet costs are being forecast in this area. There are also several income targets not expected to be achieved across each area particularly security and response services which are driving this forecast adverse position, with academisation of schools having an impact on income generation. Favourable variances in other areas such as parking, street lighting, environmental health and traffic management are offsetting these main pressures

Growth

- 2.28 The Growth Division is reporting a £3.575m projected adverse variance by the financial year end. This pressure relates to the much-reduced rent agreements currently being sought by both prospective and sitting tenants. An increased Council footprint and voids within the Spindles Shopping Centre has also led to increased service charge payable and foregone rent. Running costs and Repairs and Maintenance costs for the Council's property portfolio are having the largest impact with costs being incurred for assets within the Council's disposal programme where there has been a delay in sale or a change to the future of the asset. There are pressures within the Building Control service due to income generated being lower than that budgeted, alongside additional costs for staffing due to the use of agency workers to cover vacant posts.
- 2.29 Favourable variances in other areas such as Development Control and Housing Delivery are dampening the pressures noted above.

Communities

- 2.30 The Communities division is forecasting a favourable position by the end of the financial year of (£0.271m). Housing Needs is currently forecast to underspend by £0.126m which is reflective of falling placements in temporary accommodation coupled with the sourcing of cheaper accommodation provision. It should be noted that this area is particularly volatile and a small increase in the number of placements could lead to a significant rise in current forecasts.

Place - Planned Mitigations

- 2.31 There are planned mitigations that are in the process of being developed and / or embedded to reduce the forecast adverse position for this directorate. A summary of these are as follows:
- Review in train of the fleet replacement timelines and issues with equipment not lasting within the expected timeframe

- Continued transfer of agency workers from off contract engagements to on contract provider / permanent or fixed term recruitment
- Reports being progressed around asset transfers to reduce maintenance costs and generate rental income
- Maximisation of income streams wherever possible including grant income and attracting external income i.e. for events, new trade customers
- Minimise the gap between an assets useful economic life and its replacement to reduce / remove additional hire costs

Resources forecast favourable variance at the end of Quarter 2 of (£0.317m) (£0.059m adverse variance previously reported)

2.32 The forecast favourable position for this directorate area as at the end of September 2025 can be broken down as follows:

- | | |
|--|-----------|
| • Non- Delivery of Budget Reductions (Red and Amber) | £0.101m |
| • Expenditure Variance | £4.229m |
| • Income Variance | (£4.701m) |

Further details for the expenditure and income variances are included in the following paragraphs, with details on budget reductions included at Section 3.

2.33 The key driver for this forecast favourable position is due to slippage on vacant posts across the directorate as a whole but particularly in Transformation and Reform, Finance, HR services and Commissioning & Procurement. These favourable positions are offsetting the pressure in legal services of £0.690m due to the use of agency workers to cover vacant posts.

Resources – Planned Mitigations

2.34 Whilst the directorate is forecast to end the financial year with a favourable financial position, there are planned mitigations that are in the process of being developed and / or embedded to address any individual service area's adverse position during this financial year which would increase the favourable variance further. A summary of these are as follows:

- Continued transfer of agency workers from off contract engagements to on contract provider / permanent or fixed term recruitment
- Review of webcast services for Council meetings
- Review of all ICT Licences, software contracts and ways of working for the organisation

Capital, Treasury and Technical Accounting – no variance

2.35 The Capital, Treasury and Technical Accounting directorate holds the budgets associated with the Council's Treasury Management activities including interest payable on borrowing and interest receivable on investments and is reporting no variance as at the end of September 2025.

2.36 A detailed revenue table is attached at Appendix 1.

3 Progress on the delivery of the 2025/26 Approved Budget Savings

3.1 Table 3 below presents the progress on the delivery of the 2025/26 approved Budget savings which has been updated to reflect the position at the end of Quarter 2. For savings rated as Red and Amber, work is ongoing to achieve the saving or alternative delivery and in year mitigations are being identified to cover any potential shortfalls which may occur. It is imperative that all 2025/26 approved budget savings **must** be delivered given the limited Earmarked Reserves availability.

3.2 In terms of savings, £19.916m (£19.163m at Month 5) of the £26.584m approved budget reduction targets are either delivered or on track to be delivered (Green) representing 75% of the total savings target. 8% are off track but with targeted work could be achieved (Amber) and a further 17% or £4.637m (£5.206m at Month 5) with a high risk of not being achieved within this financial year (Red). The table below summarises the progress by Directorate:

Table 3 – Summary on progress on delivery of 2025/26 Approved Budget Reductions

2025/26 Impact of Approved Budget Reductions	Green £000	Amber £000	Red £000	Total £000
Adult Social Care	(5,381)	(1,879)	(1,228)	(8,488)
Children's Services	(3,438)	(72)	(151)	(3,661)
Place	(3,728)	(29)	(356)	(4,113)
Public Health	(465)	0	0	(465)
Resources	(4,293)	(51)	(50)	(4,394)
Capital, Treasury & Technical Accounting	(4)	0	0	(4)
TOTAL	(17,309)	(2,031)	(1,785)	(21,125)
Children's Investment Plan	(2,607)	0	(2,852)	(5,459)
TOTAL	(19,916)	(2,031)	(4,637)	(26,584)
Mth 5 Position	(19,163)	(2,215)	(5,206)	(26,584)

Significant Budget reduction variances by Directorate

Adult Social Care

3.3 Of the £8.488m of budget savings approved for the Adult Social Care Directorate, £1.228m of them are rated Red and off track. Three budget savings drive this variance as follows:

- Achieving Better Outcomes £0.583m
- Adults, Health & Wellbeing £0.145m
- Focused Transitions Team £0.500m

Children's Services

- 3.4 As detailed in Table 3, £3.003m (£3.058m at Month 5) of Children's Services budget reductions are rated Red with 95% relating to the Children's Investment Plan. The non-delivery of the Children's Investment Plan is predominately due to pressures around the reduction of high-cost placements and release of agency staff. The other Red rated savings are as follows:

- Social Work Services £0.137m
- Gemini House income £0.014m

Place

- 3.5 For this Directorate, 9% of the total approved budget reductions for this area are rated Red and relates to Environment - Service Review / Income Generation at £0.356m.

Resources

- 3.6 There is one approved budget reduction for 2025/26 rated as off track and this is the centralisation of Business Intelligence functions at £0.050m.

Mitigations / Planned Actions for non-delivery of budget reductions

- 3.7 The Financial Sustainability Delivery Board (FSDB) chaired by the Leader of the Council was established to provide additional scrutiny and challenge to the organisation around the non-delivery of agreed savings and this meets periodically to review the current and forecast delivery of agreed budget reductions. Any slip against timelines is explored and challenged with a requirement for actions to be brought back on track to ensure the delivery of the saving.
- 3.8 All approved budget reductions must be delivered in full by the end of the financial year to ensure there is no further impact on the Council's financial resilience.

4 Mitigation of Current forecast Budget Position

- 4.1 Throughout this report, corporate and service mitigations have been detailed with the aim of reducing the forecast adverse variance from the position reported, with enhancement of these controls implemented as an early action by the Executive Team to bring down the forecast position. Whilst the position at the end of Quarter 2 has improved since the position previously reported, work to mitigate this position must be continued at pace to ensure that this is reduced as much as possible by the end of the financial year.
- 4.2 As the financial year progresses and dependent of the revenue position as the mitigations implemented embed, further management actions may be required as a matter of urgency. Services continue to review their ways of working, their structures and costs to reduce spend wherever possible to deliver additional savings during this financial year.

- 4.3 The effectiveness of all management and corporate actions will continue to be closely monitored by the Executive Team. Current indications are that the overall adverse variance will continue to be reduced. Further updates will continue to be included within future monitoring reports presented to this meeting.

5 Reserves and Balances

- 5.1 On 1 April 2025, general reserves totalled £33.774m, split between Earmarked Reserves of £31.564m and Revenue Grant Reserves of £2.210m. The General Fund Balance stood at £18.865m.
- 5.2 Reserves and Balances are a key element of the Council's financial resilience and it is important that their use is kept to an absolute minimum.
- 5.3 As included within the Month 5 monitoring report, Earmarked Reserves totalling £0.402m and Revenue Grant Reserves totalling £0.030m had been requested and reviewed by the Chief Executive and the Section 151 Officer in line with the approved reserves policy. Use of these reserves will reduce the general reserve total to a projected year end balance of £33.342m. There have been no further requests as at the end of Quarter 2.
- 5.4 It should be noted by Members, that whilst there are a number of management actions being implemented to address the projected in year deficit and the delivery of all budget reductions, to the extent that mitigations do not cover the deficit, there would need to be a further unbudgeted call on reserves. Any additional use of reserves to offset any unmitigated forecast deficit in year will adversely impact the financial resilience of the Council and is not sustainable.

6 Dedicated Schools Grant (DSG)

- 6.1 The Quarter 2 Dedicated Schools Grant (DSG) position is an in-year overspend of £10.048m, which is an adverse movement of £1.414m compared to the position reported to the last Schools Forum in June 25. The overall DSG deficit position is therefore, currently forecast to be £8.886m at the year end. The most significant pressure remains within the High Need Block (HNB), which has deteriorated by a further £1.414m compared to the Quarter 1 position. The current position has not been reported to the Schools Forum. Work is ongoing and an updated position will be presented at the next meeting scheduled for 3 December 2025.

Table 4 - Dedicated Schools Grant: Quarter 2

	Budget £000	Forecast £000	Variance £000	Movement £000
Schools Block	274,777	276,157	(1,380)	0
Central School Services Block (CSSB)	2,559	2,559	0	0
Early Years Block	38,410	38,732	(322)	0
High Needs Block	66,954	75,300	(8,346)	(1,414)
Sub Total	382,700	392,748	(10,048)	(1,414)
Deficit/ Surplus Brought Forward		1,182	1,182	
Cumulative Deficit/ Surplus		393,930	(8,866)	(1,414)

6.2 The main points to note are as follows:

- There was a 2024/25 DSG surplus of £1.182m carried forward into 2025/26, this included £1.380m for Growth Fund underspend within the Schools Block. This is fully committed in 2025/26 and accounts for the forecast overspend within the schools Block in the current financial year.
- Expenditure within the Central Services Block is currently forecast to budget.
- There is a projected overspend of £0.322m within the Early Years Block offsetting the underspend carried forward from 2024/25.
- Had both the above underspends not been recommitted for 2025/26 the final DSG outturn for 2024/25 would have been in a deficit position at the end of 2024/25 of £0.520m
- An increased pressure of £1.414m within the High Needs Block (HNB), relates to further escalation in costs relating to Out of Borough and Special School provision.
- The DSG is a ringfenced account and there is currently a statutory override which excludes the deficit from being counted against the Council's reserves position. The Government has announced that it will extend this statutory override to keep Councils' spending deficits for Special Educational Needs and Disabilities (SEND) off their balance sheets for another two years until the end of 2027/28.
- Funding announcements in relation to the 4 blocks of the DSG are most likely to be made public in December. The current forecast assumes increases comparable to those in the previous year and any deviation could have an impact on the forecast position, particularly in relation to the High Needs Block.

7 Housing Revenue Account Budget & Forecast (2025/26)

Table 5 – Housing Revenue Account - Quarter 2

	Original Budget	Revised Budget	Spend as at Q2	Forecast Outturn	Variance From Budget
	£000	£000	£000	£000	£000
Income					
Dwelling Rents	(10,579)	(10,571)	(4,048)	(10,641)	(70)
Service Charges & Other Income	(1,354)	(1,503)	(734)	(1,499)	4
PFI Credits	(18,799)	(18,799)	(4,700)	(18,799)	0
Interest on Balances	(200)	(200)	0	(200)	0
Total Revenue Income	(30,932)	(31,073)	(9,482)	(31,138)	(66)
Expenditure					
Repairs & Maintenance	52	51	35	91	40
Utilities	788	778	197	765	(13)
Rents & Rates	117	116	3	115	(1)
RCCO	3,193	1	0	0	(1)
PFI Management Costs inc MRP	27,405	27,604	12,363	27,577	(27)
Other Supervision & Management	1,015	1,002	0	959	(43)
Central Overheads	984	892	0	873	(19)
Other Miscellaneous	787	776	299	781	5
Depreciation	80	307	0	305	(1)
Adjustments to the Loss Allowance	0	136	0	150	14
Total Revenue Expenditure	34,421	31,661	12,898	31,615	(46)
Total HRA (Surplus)/Deficit	3,489	589	3,415	477	(112)

Housing Revenue Account (HRA)

- 7.1 The HRA for 2024/25 produced a surplus of £3.34m which was transferred to the HRA Reserve at year end. The main reason for such a significant variance was PFI Management Costs. These were reported as lower than expected due to a change in the accounting treatment. Effectively, this has resulted in additional monies being transferred to the reserve, and this will be required to pay off associated debt in future years.
- 7.2 The original budget for 2025/26 was prepared in January 2025 and has subsequently been revised to reflect changes where appropriate. The greatest change is a reduction in the Revenue Contribution to Capital Outlay (RCCO) budget, which has reduced by over £3m due to a delay in the expected requirement to contribute towards the refurbishment of Metropolitan House.

7.3 The latest HRA forecast for 2025/26 shows a required drawdown of £0.477m from the HRA reserve, compared to a revised budgeted drawdown of £0.589m. The main areas where the forecasts vary from budget are as follows:

- Income (Rents and Service Charges) – income £0.070m higher than budgeted
- Other Supervision & Management - £0.043m – mainly staffing savings
- Utility Costs – Currently forecast to underspend by £0.013m compared to the budget. Most costs come through in Quarters 3 and 4 so this is subject to change.
- PFI Management Savings - £0.027m

7.4 These are offset by:

- additional costs of £0.040m on Repairs and Maintenance, mainly heating repairs at Holly Bank
- a further net £0.001m on various other areas of spend.

HRA Capital Programme

7.5 There was minimal capital expenditure (£0.001m) during 2024/25, and it is anticipated that this will remain the case during 2025/26. Capital expenditure consists of:

- works to properties outside of the PFI agreements
- works to PFI properties that are outside the scope of the PFI agreement.

HRA Reserves Position

7.6 Reserves at the start of 2025/26 stood at £24.447m, and the forecast balance would see this reduce to £23.970m.

7.7 The level of reserves is required to meet future commitments in the Housing Revenue Account, and to ensure that the PFI schemes can be funded as the corresponding Government credits do not increase to take account of inflationary pressures.

7.8 In addition, a change in the way that interest repayment on the two PFI schemes is accounted for has resulted in £2.273m of the current reserves being specifically earmarked for repayment of interest after the PFI contracts have ended.

Table 6 – Housing Revenue Account Forecast Reserves position – Quarter 2

HRA Reserve	£000
Balance brought forward from 2024/25	(24,447)
Forecast Transfer to HRA 2025/26	477
Forecast Balance at 2025/26 Year End	(23,970)

8 Revenue Funding and Collection Fund

- 8.1 Council Tax and Business Rates are a significant source of funding for Council services with income from these areas highly volatile. The 2025/26 financial year is no different with the on-going impact of the cost-of-living crisis having an impact on Council Tax collection. As such, the financial position of the Collection Fund is under constant review.
- 8.2 It is often difficult to forecast a likely outturn position on Council Tax and Business Rates, given the patterns of cash collection, claims for Council Tax Support and exemptions have not yet matured. A detailed update will be provided in the Quarter 3 report.
- 8.3 The Greater Manchester (GM) 100% Business Rates Retention Scheme has continued into 2025/26. Any financial benefits arising from membership within the pilot scheme will continue to be monitored.
- 8.4 For 2026/27, the Government has announced a National Business Rates Reset which will look to redistribute funding across the whole system. Greater Manchester has its own Business Rates Retention Scheme which will result in a partial Business Rates Reset for the region, whereby an element of growth will be retained by the GM scheme before the national reset applies. This is a highly complex area of work with limited information available around the impact for GM and for Oldham itself. It is expected that the forthcoming Policy Statement will provide further clarity on the impact of the Business Rates Reset, and updates will be provided as part of the Council's budget setting process.

9 Summary

- 9.1 The current projected position as at the end of Quarter 2, shows a potentially significant adverse position by the end of the financial year but which has improved from the position previously reported. This remains a serious concern for the Council and early actions have been taken by the Executive Team to address this position with work continuing across the whole organisation to reduce the position wherever possible. With the reduced level of reserves held by the Council it is important that this position continues to be addressed as a priority and must be reduced by year end to limit the impact it has on the financial sustainability of the Council.
- 7.1 Whilst 83% of savings delivered or with the potential to deliver after targeted intervention, given the overall financial pressures facing the Council, the uncertainty around the deliverability of the remaining 17% of savings is of concern. Any non-achievement of savings not only impacts the current year position but has implications on future years budgets. Delivery of all budget reductions must be achieved for 2025/26 to ensure no unbudgeted use of general revenue reserves are required. This will continue to be closely monitored through the monthly Delivery Board meetings.
- 7.2 The increasing need for use of the Council's services from residents and businesses, the complexity of the support needed, and inflationary costs continue to put pressure on service budgets and is demonstrated by the Quarter 2 forecast outturn position. These pressures, in the main driven by escalating costs in essential statutory services supporting the most vulnerable residents, reflects the broader challenges the Council and numerous Councils

across the country are facing. This is particularly acute in statutory and heavily inspected services where there is little flexibility to mitigate rising costs, for example increasing pressures on social care budgets due to the support needs of vulnerable children and complexity in the needs of adult requiring support. There is also an increasing need to support children with Special Educational Needs (SEND) and whilst significant work has been done in the last 12 months, homelessness presentations and use of temporary accommodation is still of concern given the numbers accessing this service.

- 7.3 This position is not specific to Oldham. Councils across the country continue to warn of financial distress and the risk of bankruptcy if insufficiency of funding and areas of budget pressure are not addressed by government. The numbers of Councils expected to request temporary assistance by way of Exceptional Financial Support (EFS) is expected to increase dramatically as part of the setting of the budget for 2026/27 and future years.
- 7.4 Given, the in-year financial position of the Council, the level of reserves available and the budgetary gaps already within the MTFS, the outcome of the Local Government Finance Settlement for 2026/27 and future years will have a significant influence on the financial sustainability of the Council and the Council's ability to set a balanced budget over the short term. The budget pressures the Council has faced in recent years cannot be mitigated indefinitely given the resources available.
- 7.5 Alongside this the Council will also need to consider how it continues to deliver local services. This will require Members to make challenging decisions. Without this combination of a national and local approach the Council's longer term financial robustness and resilience will be impacted, and the medium-term financial challenge will become increasingly difficult to manage and mitigate.
- 7.6 In view of the adverse variance reported it is important that mitigations are continued to be found and implemented to address the in-year position but also to reduce any impacts on the 2026/27 position.

APPENDIX 1 – 2025/26 Directorate Summary Financial Positions at 30 September 2025

DIRECTORATE	SERVICE AREA	Qtr 2 Annual Budget £000	Qtr 2 Annual Forecast £000	Annual Forecast Variance £000
Adult Social Care	Commissioning	15,718	15,698	(20)
	Community Business Services	893	862	(31)
	Clusters	3,275	3,777	502
	Community Health & Social Care	30,951	36,278	5,326
	Director Adult Social Care	1,638	1,623	(15)
	Learning Disability	17,837	21,050	3,213
	Mental Health	11,518	13,194	1,677
	Clusters	276	382	106
	Safeguarding	584	572	(13)
Adult Social Care Total		82,691	93,436	10,745
Children's Services	Children in Care	53,231	59,091	5,860
	Childrens Safeguarding	3,564	3,302	(262)
	Fieldwork & Family Support	11,681	12,057	376
	Children's Services Intergration	2,445	2,215	(230)
	Central Education Services	847	847	0
	Community / Adult Learning	300	300	(0)
	Inclusion Service	(428)	(428)	0
	Learning Services	257	258	1
	Learning Services - Early Years	(194)	(194)	(1)
	Post 16 Service	44	45	1
	School Support Services	76	36	(39)
	SEND Services	7,938	8,006	68
	Skills and Employment	84	84	(0)
	Early Help	4,408	4,054	(354)
	Troubled Families	1,936	1,824	(111)
Children's Services Total		86,189	91,498	5,308
Public Health	Public Health (Client and Delivery)	20,324	20,202	(122)
	Leisure Services	3,379	3,332	(46)
Public Health Total		23,703	23,534	(169)
Place	Building Control	69	400	331
	Strategic Planning	18,015	18,010	(5)
	Development Control	70	(46)	(115)
	Housing Delivery	296	286	(10)
	Facilities Management	609	711	102
	Corporate Estates	37	1,616	1,579
	Property Services	(1,103)	(1,546)	(444)
	Town Centre	569	2,706	2,137
	Creating a Better Place	(253)	(253)	0
	Structures	141	141	0
	Operations	1,918	1,707	(211)
	Traffic Management & Maintenance	1,870	1,838	(32)
	Parking Admin & Enforcement	(987)	(958)	29
	Health & Safety	291	289	(2)
	Environmental Health	1,027	974	(53)
	Licensing & Trading Standards	(6)	63	69
	First Response	(155)	851	1,006
	Street Lighting	4,316	4,258	(58)
	Waste & Cleansing	24,643	26,017	1,374
	Parks / Ground Maintenance	4,965	5,055	89
	Arboriculture	588	587	(1)
	Emergency Planning	62	129	67
	Fleet	(252)	(255)	(2)
	Community Safety & Cohesion	650	566	(84)
	Districts	1,171	1,107	(63)
	Culture	6,393	6,379	(14)
	Youth Services	848	865	17
	Housing Needs	7,495	7,369	(126)
Place Total		73,286	78,865	5,578

DIRECTORATE	SERVICE AREA	Qtr 2 Annual Budget £000	Qtr 2 Annual Forecast £000	Annual Forecast Variance £000
Resources	Partnership Support (Borough and GM)	1,829	1,829	0
	Strategic Customer Service	256	256	0
	Chief Executive Management	2,231	2,209	(22)
	Communications and Research	587	536	(50)
	Customer Services	1,991	2,004	13
	ICT	5,951	5,951	0
	Democratic and Civic Services	324	384	60
	Audit	2,543	2,522	(21)
	Commissioning and Procurement	633	445	(188)
	Democratic and Civic Services	472	440	(32)
	External Funding	(27)	(27)	(0)
	Finance	2,759	2,580	(180)
	Housing Benefit Payments	393	393	0
	Revenues and Benefits	4,400	4,400	(0)
	Transformation and Reform	259	(55)	(315)
	HR Strategy	2,850	2,619	(231)
	Organisational Development	416	416	0
	Democratic and Civic Services	2,444	2,418	(25)
	Legal	1,863	2,553	690
	Registrars	(87)	(143)	(57)
	Strategy and Performance	1,369	1,357	(12)
Resources Total		33,457	33,087	(370)
Capital Treasury and Technical Accounting	Corporate Expenses	11,978	11,978	0
	Interest and Investment Expenditure and Income	11,305	11,305	0
	Corporate and Democratic Core	1,003	1,003	0
	Parish Precepts	400	400	0
Capital Treasury and Technical Accounting Total		24,686	24,686	0
Grand Total		324,012	345,106	21,094

ANNEX 2

CAPITAL INVESTMENT PROGRAMME 2025/26- 2029/30 & 2025/26 MONITORING REPORT Month 6 (September)

1 Background

- 1.1 The original capital programme for 2025/26 reflected the priorities outlined in the Capital Strategy as approved at Cabinet on 17 February 2025 and confirmed at the Council meeting on 6 March 2025.
- 1.2 The position at the end of Month 6 (September 2025) is highlighted in this report.
- 1.3 For the remainder of the financial year, the programme will continue to be monitored and revised to take account of any new developments and changes in the profile of planned expenditure.

Current Position

- 2.1 Table 1 below shows the capital programme for 2025/26 and a further four years to 2029/30, and reflects the priorities outlined in the Capital Strategy.

Table 1 – 2025/30 Capital Strategy

Directorate Budget	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	2029/30 £000	Total £000
Community Health and Adult Social Care	4,106	3,000	3,000	-	-	10,106
Children's Services	10,482	3,151	2,000	-	-	15,632
Communities	338	-	-	-	-	338
Place	80,617	14,997	15,501	2,055	-	113,170
Housing Revenue Account (HRA)	3,193	206	210	215	219	4,043
Resources/Information Technology (IT)	3,165	3,123	2,595	1,877	-	10,760
Capital, Treasury & Technical Accounting	3,600	2,628	4,373	2,500	5,000	18,101
Funding for Emerging Priorities	3,000	2,885	2,000	-	-	7,885
Total Expenditure	108,501	29,990	29,680	6,647	5,219	180,037

Funding	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	2029/30 £000	Total £000
Grant & Other Contributions	(60,800)	(9,736)	(9,558)	(780)	-	(80,874)
Prudential Borrowing	(39,855)	(17,480)	(17,660)	(3,343)	(3,000)	(81,338)
Revenue Contributions	(3,193)	(206)	(210)	(215)	(219)	(4,043)
Capital Receipts	(4,653)	(2,567)	(2,252)	(2,309)	(2,000)	(13,781)
Grand Total	(108,501)	(29,990)	(29,680)	(6,647)	(5,219)	(180,037)

- 2.2 Following the 2025/26 M05 report which was approved at Cabinet on 20 October 2025, the 2025/26 Capital Programme has been revised to reflect any additional funding and/or anticipated reprofiling.

Realignment of Schemes

- 2.3 Six school boiler replacement schemes totalling £0.326m have been taken from Children's services and assigned to the Corporate Assets service.
- 2.4 The revised capital programme for 2025/26 to 2029/30, considering all the above amendments in arriving at the revised forecast position, is shown in Table 2 together with the projected financing profile.

Table 2 – 2025/26 to 2029/30 Current Capital Programme (all years)

Directorate Budget	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	2029/30 £000	TOTAL £000
Community Health and Adult Social Care	4,646	3,000	3,500	-	-	11,146
Children's Services	6,247	7,786	6,456	2,184	-	22,673
Communities	245	-	-	-	-	245
Heritage, Libraries and Arts	491	-	-	-	-	491
Place	101,660	17,738	15,531	1,955	-	136,884
Housing Revenue Account (HRA)	1,403	7,195	2,220	215	219	11,252
Resources/Information Technology (IT)	3,956	2,137	2,595	1,877	-	10,565
Capital, Treasury & Technical Accounting	3,600	2,640	4,374	2,500	5,000	18,114
Funding for Emerging Priorities	-	2,577	2,000	2,506	-	7,083
Grand Total	122,248	43,073	36,676	11,237	5,219	218,453

Funding	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	2029/30 £000	TOTAL £000
Grant & Other Contributions	(81,174)	(21,345)	(16,114)	(780)	-	(119,413)
Prudential Borrowing	(34,026)	(16,970)	(18,260)	(7,933)	(3,000)	(80,189)
Revenue Contributions	(1,486)	(2,195)	(210)	(215)	(219)	(4,325)
Capital Receipts	(5,562)	(2,563)	(2,092)	(2,309)	(2,000)	(14,527)
Grand Total	(122,248)	(43,073)	(36,676)	(11,237)	(5,219)	(218,453)

- 2.5 This leaves the revised 2025/26 capital programme at £122.248m compared with the M05 position presented to Cabinet of £122.222m, an increase of £0.026m between Month 5 and Month 6 which has been approved as part of other decision processes within September – as below:

Schemes/Funding	£m
New Disabled Facilities Grant Contributions	0.026
Total	0.026

- 2.6 As a result of the approved movements since the last reporting period the current 2025/26 Programme is presented in Table 3 by Directorate below.

Table 3 – Current year

Directorate Budget	Capital Strategy 2025-30 £000	Revised Budget (M05) £000	Approved Virements (M06) £000	Proposed Virements (M06) £000	Current Budget (M06) £000	Spend to M06 £000
Community Health and Adult Social Care	4,106	4,620	26	-	4,646	1,325
Children's Services	10,482	6,573	(326)	-	6,247	801
Communities	338	245		-	245	-
Heritage, Libraries and Arts	-	491		-	491	458
Place	80,617	101,334	326	-	101,660	22,866
Housing Revenue Account (HRA)	3,193	1,403		-	1,403	1
Resources/Information Technology (IT)	3,165	3,956		-	3,956	522
Capital, Treasury & Technical Accounting	3,600	3,600		-	3,600	-
Funding for Emerging Priorities	3,000	-		-	-	-
Grand Total	108,501	122,222	26	-	122,248	25,973

2.7 Given that this is the position as at Month 6 and in view of the current challenges being faced including the pressure caused by the economic position, there must remain an element of uncertainty about the forecast position. A further breakdown of Table 3 on a service-by-service area basis is shown at Appendices A to I.

2.8 Actual expenditure to 30 September was £25.973m (21.2% of the proposed forecast outturn). This spending profile is lower than last years (31.3%). The position will be kept under review and budgets will be managed in accordance with forecasts.

Capital Receipts

2.9 The capital programme requires the availability of £5.562m of capital receipts in 2025/26 for financing purposes. This includes £2.600m to support transformational activity in the General Fund using the flexibility allowed by Government.

The total net usable capital receipts currently received in year is £0.503m, the first call being the £2.600m outlined above.

2.10 The capital receipts position as at 30 September 2025 is as follows:

Table 4 – Capital Receipts 2025/26

	£000	£000
Capital Receipts Financing Requirement		5,562
Usable Capital Receipt b/fwd.	-	
Actual capital receipts received to date	(503)	
Identified in year capital receipts	(4,520)	
Anticipated shortfall in 2025/26		539

2.11 Given the significant amount of capital receipts needed to finance the capital programme in this and future years it is imperative that the capital receipts/disposal

schedule is adhered to. This is monitored at the monthly Capital Receipts meeting and will be subject to on-going review throughout the year. It is of course recognised that the ongoing economic instability with high interest rates and the impact on borrowing costs, coupled with the increase cost of living will continue to impact on business/economic activities making capital disposals more challenging.

- 2.12 The Capital Strategy and Capital Programme 2025/30 incorporates an expectation of the level of receipts that is anticipated in each of the respective years and therefore an estimate as to the resultant level of over or under programming in order to present a balanced budget. As can be seen below, the most recent review has produced a forecast which is below the financing projections included in Table 2. Should the currently estimated position prevail then the position would be as illustrated in the table below:

Table 5 – Capital Receipts 2025/26 to 2029/30

Capital Receipts	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	2029/30 £000
Capital Receipts Carried Forward	-	539	(4,488)	(4,936)	(2,883)
Identified Capital Receipts	(4,520)	(7,590)	(2,540)	(256)	-
Received in year	(503)				
Total Receipts	(5,023)	(7,051)	(7,028)	(5,192)	(2,883)
Capital Receipts Financing Requirement	5,562	2,563	2,092	2,309	2,000
Over/(Under) programming	539	(4,488)	(4,936)	(2,883)	(883)

- 2.13 The capital receipts forecast (across all years) is currently higher than the required amount. Since this is the Month 6 position and there is the opportunity for the forecast to change, at this stage it is considered appropriate to retain the original forecast and review this during the course of the current year. The consequence should the level of capital receipts fall is either, a corresponding increase in the level of prudential borrowing and hence an impact on the revenue budget, or a reduction in the overall capital programme.

Annual Review of the Capital Programme

- 2.14 In accordance with previous practice, there is once again a review of the capital programme over the summer months and this is still continuing (the Annual Review). This review is examining any further opportunities to reallocate, decommission or reprofile resources. It will also include an in-depth analysis of capital receipts to support a revised forecast.

3 Conclusion

- 3.1 Whilst the current projected position is showing the outturn to match the budget, a detailed review of the capital programme (the Annual Review) is being undertaken to establish if there are any surplus resources that can be realigned or any further re-profiling required. It is therefore likely that there will be further rephasing across all years to reflect developments relating to individual projects/schemes.
- 3.2 The capital programme is being continually monitored and is reported to Members on a regular basis.

4 **Appendices**

- 4.1 Appendix A - SUMMARY – Month 6 - Community Health and Adult Social Care
- Appendix B - SUMMARY – Month 6 - Children’s Service
- Appendix C - SUMMARY – Month 6 - Communities
- Appendix D - SUMMARY – Month 6 - Heritage, Libraries and Arts
- Appendix E - SUMMARY – Month 6 - Place
- Appendix F - SUMMARY – Month 6 - Housing Revenue Account (HRA)
- Appendix G - SUMMARY – Month 6 - Corporate/Information Technology
- Appendix H - SUMMARY – Month 6 - Capital Treasury and Technical Accounting
- Appendix I - SUMMARY – Month 6 - Funding for Emerging Priorities

SUMMARY – Month 6 (September 2025) - Community Health and Adult Social Care**APPENDIX A**

Service area	Original Budget	Revised Budget (M05)	Approved Virements (M06)	Proposed Virements (M06)	Revised Budget (M06)	Expend to M06
Adult Services	4,106	4,620	26	-	4,646	1,325
Community Health and Adult Social Care Total	4,106	4,620	26	-	4,646	1,325

SUMMARY – Month 6 (September 2025) – Children’s Services**APPENDIX B**

Service area	Original Budget	Revised Budget (M05)	Approved Virements (M06)	Proposed Virements (M06)	Revised Budget (M06)	Expend to M06
Children, Young People and Families (CYPF)	1,000	1,378	-	-	1,378	238
Schools - General Provision	6,473	2,368	-	-	2,368	269
Schools – Primary	-	1,201	(326)	-	875	71
Schools – Secondary	3,009	1,608	-	-	1,608	201
Schools – Special	-	18	-	-	18	2
Schools – New Build	-	-	-	-	-	20
Children’s Services Total	10,482	6,573	(326)	-	6,246	800

SUMMARY – Month 6 (September 2025) – Communities**APPENDIX C**

Service area	Original Budget	Revised Budget (M05)	Approved Virements (M06)	Proposed Virements (M06)	Revised Budget (M06)	Expend to M06
Local Investment Fund	338	245	-	-	245	-
Communities Total	338	245	-	-	245	-

SUMMARY – Month 6 (September 2025) – Heritage, Libraries and Arts**APPENDIX D**

Service area	Original Budget	Revised Budget (M05)	Approved Virements (M06)	Proposed Virements (M06)	Revised Budget (M06)	Expend to M06
Heritage, Libraries and Arts	-	491		-	491	458
Heritage, Libraries and Arts Total	-	491		-	491	458

SUMMARY – Month 6 (September 2025) – Place**APPENDIX E**

Service area	Original Budget	Revised Budget (M05)	Approved Virements (M06)	Proposed Virements (M06)	Revised Budget (M06)	Expend to M06
Asset Management – Corporate Premises	2,670	4,336	-	-	4,336	1,054
Asset Management - Education Premises	1,148	1,707	326	-	2,033	346
Boroughwide Developments	28,177	26,904	-	-	26,904	10,134
Boroughwide District Projects	17	27	-	-	27	-
Cemeteries and Crematorium	-	-	-	-	-	7
Countryside	80	39	-	-	39	2
Parks	13	897	-	-	897	446
Playing Fields & Facilities	-	49	-	-	49	-
Parks & Playing Fields	11	11	-	-	11	
Private Housing	5,677	12,246	-	-	12,246	38
Strategic Acquisitions	1,647	2,147	-	-	2,147	853
Town Centre Developments	27,593	27,812	-	-	27,812	7,036
Transport - Accident Reduction	744	1,013	-	-	1,013	220
Transport - Bridges & Structures	4,107	9,484	-	-	9,484	538
Transport - Fleet Management	175	248	-	-	248	-
Transport - Highway Major Works/Drainage schemes	8,498	13,673	-	-	13,673	2,052
Transport - Minor Works	60	632	-	-	632	103
Miscellaneous	-	109	-	-	109	37
Place and Economic Growth Total	80,617	101,334	326	-	101,660	22,866

SUMMARY – Month 6 (September 2025) - Housing Revenue Account (HRA)

APPENDIX F

Service area	Original Budget	Revised Budget (M05)	Approved Virements (M06)	Proposed Virements (M06)	Revised Budget (M06)	Expend to M06
Housing Revenue Account	3,193	1,403	-	-	1,403	1
HRA Total	3,193	1,403	-	-	1,403	1

SUMMARY – Month 6 (September 2025) – Resources/Information Technology (IT)

APPENDIX G

Service area	Original Budget	Revised Budget (M05)	Approved Virements (M06)	Proposed Virements (M06)	Revised Budget (M06)	Expend to M06
Information Technology	3,165	3,956	-	-	3,956	522
Information Technology Total	3,165	3,956	-	-	3,956	522

SUMMARY – Month 6 (September 2025) – Capital Treasury and Technical Accounting

APPENDIX H

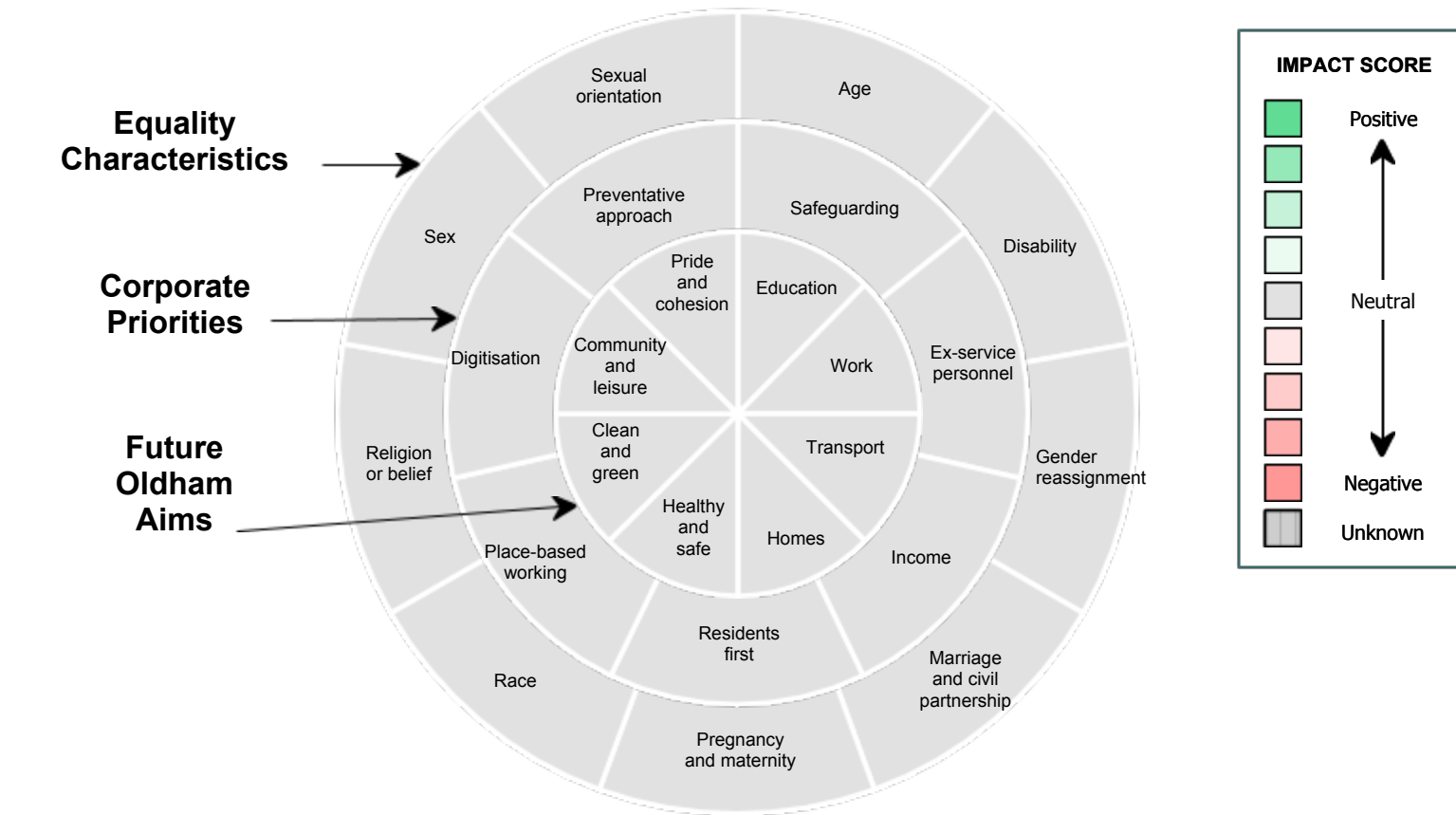
Service area	Original Budget	Revised Budget (M05)	Approved Virements (M06)	Proposed Virements (M06)	Revised Budget (M06)	Expend to M06
Cross Cutting /Corporate	3,600	3,600	-	-	3,600	-
Capital Treasury and Technical Accounting Total	3,600	3,600	-	-	3,600	-

SUMMARY – Month 6 (September 2025) - Funding for Emerging Priorities

APPENDIX I

Service area	Original Budget	Revised Budget (M05)	Approved Virements (M06)	Proposed Virements (M06)	Revised Budget (M06)	Expend to M06
Funding for Emerging Priorities	3,000	-	-	-	-	-
Funding for Emerging Priorities Total	3,000	-	-	-	-	-

TOTAL	108,501	122,222	26	-	122,248	25,973
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Annex 3- EIA: Financial Monitoring 25/26 (Mth 6)				
	Impact	Likelihood	Duration	Comment
Equality Characteristics				
Age	Neutral	Possible	Short Term	The report considers the 2025/26 financial position of the Council at Month 6 (30 September 2025) and as such, in isolation has no direct impact on Equality
Disability	Neutral	Possible	Short Term	As Above
Gender reassignment	Neutral	Possible	Short Term	As Above
Marriage and civil partnership	Neutral	Possible	Short Term	As Above
Pregnancy and maternity	Neutral	Possible	Short Term	As Above
Race	Neutral	Possible	Short Term	As Above
Religion or belief	Neutral	Possible	Short Term	As Above
Sex	Neutral	Possible	Short Term	As Above
Sexual orientation	Neutral	Possible	Short Term	As Above
Corporate Priorities				
Safeguarding	Neutral	Possible	Short Term	The report considers the 2025/26 financial position of the Council at Month 6 (30 September 2025) and as such, in isolation has no direct impact on Equality
Ex-service personnel	Neutral	Possible	Short Term	As Above
Income	Neutral	Possible	Short Term	As Above
Residents first	Neutral	Possible	Short Term	As Above
Place-based working	Neutral	Possible	Short Term	As Above
Digitisation	Neutral	Possible	Short Term	As Above
Preventative approach	Neutral	Possible	Short Term	As Above
Future Oldham Aims				
Education	Neutral	Possible	Short Term	The report considers the 2025/26 financial position of the Council at Month 6 (30 September 2025) and as such, in isolation has no direct impact on Equality
Work	Neutral	Possible	Short Term	As Above
Transport	Neutral	Possible	Short Term	As Above
Homes	Neutral	Possible	Short Term	As Above
Healthy and safe	Neutral	Possible	Short Term	As Above
Clean and green	Neutral	Possible	Short Term	As Above
Community and leisure	Neutral	Possible	Short Term	As Above
Pride and cohesion	Neutral	Possible	Short Term	As Above

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Report to Council

Council Tax Reduction Scheme 2026/27

Portfolio Holder: Councillor Abdul Jabbar MBE, Deputy Leader and Cabinet Member for Finance, Corporate Services and Sustainability

Officer Contact: Fiona Greenway – Executive Director of Resources

Report Author: Adam Parsey, Interim Head of Revenues

Contact: adam.parsey@oldham.gov.uk

17 November 2025

Reason for Decision

The purpose of this report is to present to Council the proposed Council Tax Reduction Scheme for 2026/27.

Executive Summary

The Council is required to review its Council Tax Reduction (CTR) Scheme each year and decide whether to revise it or leave it unchanged.

A major consultation exercise has not been undertaken regarding changes to the CTR scheme and the Greater Manchester Combined Authority has been provisionally advised that no change to the scheme is proposed. In this regard, the proposal is that the CTR scheme for 2026/27 remains the same as that operating in 2025/26 and, therefore, no consultation exercise is required. The current CTR scheme provides a maximum reduction equivalent to 85% of the Council Tax charge for a Band A property and this has been unchanged since 2014/15.

The scheme continues to meet the needs of residents and remains in line with national regulations.

Caseload has continued to gradually decrease, and there have been no national or legislative changes that would require any local amendment.

During 2026/27, officers will scope potential options for 2027/28 to assess whether any amendments to the scheme would provide value for money. This will include consideration of the cost of system changes, any potential administrative savings, and the ongoing need to ensure the scheme continues to support residents effectively.

Recommendation

It is recommended that Council approves that the existing Council Tax Reduction Scheme remains unchanged for 2026/27.

Council Tax Reduction Scheme 2026/27**1 Background**

- 1.1 The Council Tax Reduction Scheme was introduced in April 2013 when the Government replaced the national Council Tax Benefit system with locally determined schemes. At that time, Government funding for the new local schemes was reduced by around 10%.
- 1.2 Oldham Council developed its local scheme to operate within the reduced level of funding while continuing to provide appropriate support to residents on low incomes. Since then, the Council has maintained a local scheme that mirrors the principles of the former national scheme, with annual reviews to ensure it remains fair, affordable, and effective.
- 1.3 Funding for Council Tax Reduction is now included within the Council's overall financial settlement and is no longer provided as a separate grant. This means that any change to the local scheme must be funded from within existing Council resources.
- 1.4 Under national regulations, pension-age residents are protected through a prescribed scheme set by the Ministry of Housing, Communities and Local Government (MHCLG). Local discretion applies only to working-age residents. Oldham's scheme continues to mirror the national approach as far as possible, to maintain fairness, simplicity, and consistency of administration.
- 1.5 The legislation confers an obligation on the Council to consider whether to review the CTR scheme on an annual basis. The scheme cannot be amended in-year and can only be changed following consultation with the public and the major preceptor, the Greater Manchester Combined Authority (GMCA) on behalf of the Mayor of Greater Manchester and the Greater Manchester Police and Crime Commissioner.

The Council's key objectives for maintaining a local Council Tax Reduction Scheme remain:

- Supporting residents on low incomes.
- Providing work incentives where possible, and
- Maintaining high levels of Council Tax collection to protect essential local services.

When the local scheme was first introduced, it followed an extensive public consultation process. The current scheme design therefore reflects the principles agreed through that consultation and has been reviewed each year since its introduction.

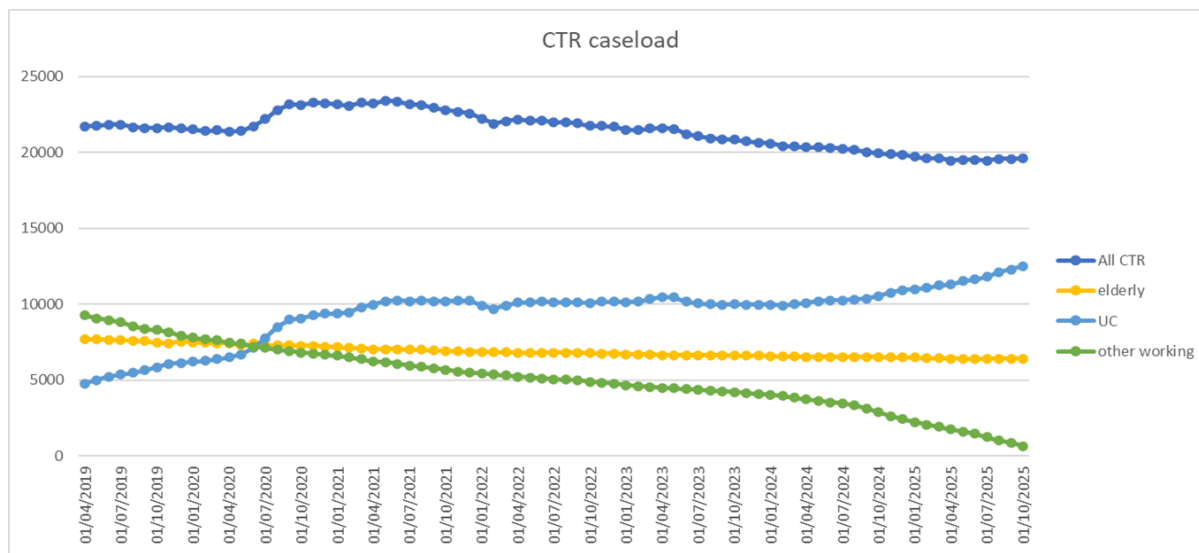
Minor administrative changes have been made over time to reflect national welfare reforms, such as the rollout of Universal Credit and the annual uprating of applicable amounts and income disregards. However, the overall design and intent of the scheme have remained consistent since 2013/14.

Oldham also continues to disregard War Disablement Pensions, War Widows' Pensions and Armed Forces Compensation Payments in full, as part of the Council's commitment to support veterans and their families.

2 Current Position

-
- 2.1 The Council currently has a CTR scheme that awards a maximum payment of 85% of a Band A rate of Council Tax and has removed the provision to award second adult rebate for claimants of working age. From April 2019, the Council also introduced changes to support CTR claimants in receipt of Universal Credit (UC) including the application of some earnings disregards and the use of DWP information as a claim for CTR.
- 2.2 The Council has maintained the same maximum level of support for working age claimants at 85% since 2014/15. The minimum weekly payment has risen from £3.64 in 2019/20 to £4.70 in 2025/26, because of annual increases in Council Tax charges.
- 2.3 On 1 October 2025, there were 13,174 working age CTR claimants. Current projections for the annual collection rate for CTR cases due in 2025/26 suggest a collection rate of between 75-80%. Given the 5% collection rate range, this is potentially lower CTR collection rate to that recovered in 2024/25 (78.36%) and 2023/24 (78.20%), although an 80% collection rate would compare well to both years.
- 2.4 A reduced collection rate of 1% of CTR debt could result in a reduction of £55k in Council Tax receipts for 2025/26 and hence reduce the resources available to support the financial position of the Council in future years (it should be noted that changes in relation to Council Tax income impact one year in arrears given the accounting arrangements that must be applied).
- 2.5 The roll out of the full service of UC commenced in Oldham from April 2017. UC is a single monthly payment which replaces six working age benefits (known as legacy benefits). These are Housing Benefit (HB), Income Support (IS), Working Tax Credits (WTC), Child Tax Credit (CTC), Employment and Support Allowance (ESA) (Income-related) and Job Seekers Allowance (JSA) (Income-related). The roll out of UC follows a process of natural migration i.e., as a claimant experiences a relevant change of circumstances such as becoming fit for work, entitlement to legacy benefits ends and UC must be claimed instead. Oldham was an early adopter of UC full service and in February 2024 (the latest available figures), rollout was 81% complete in Oldham East and Saddleworth and 78% in Oldham West and Royton. The North West average is 76%.
- 2.6 From April 2023, the DWP reinstated the UC managed migration programme which was suspended during the period of the COVID-19 pandemic starting with all claimants in receipt of tax credits. Migration notices have been issued to claimants in Oldham since June 2023.
- 2.7 The DWP has committed to completing the migration of all legacy welfare benefits by the end of 2025/26. This means that the Council would not be able to predict the impact and cost of an amended CTR scheme accurately for working age claimants for 2026/27.
- 2.8 In most cases, claimants in receipt of legacy welfare benefits receive a higher income than those residents in receipt of UC. This means that residents on legacy welfare benefits receive less support under the current CTR scheme.
- 2.9 As of 1 October 2025, the overall CTR caseload was 19,589. The caseload for those of pensionable age remains relatively static but Table 1 below demonstrates how CTR claims from those who are in receipt of UC are increasing as other working age CTR cases are reducing, for example, from those who are in receipt of HB. The management of UC/CTR creates an administrative burden for Local Authorities as data files are received each month confirming changes to entitlement however small.

Table 1: CTR Caseload Changes



- 2.10 the existing scheme for 2025/26 has operated effectively, providing financial assistance to residents who need support with their Council Tax. There have been no national legislative changes affecting local schemes for 2026/27. As a result, there is no requirement to amend the local scheme, which remains compliant with all relevant regulations and guidance.
- 2.11 It is therefore proposed that the current Council Tax Reduction Scheme continues unchanged for 2026/27, covering the period from 1 April 2026 to 31 March 2027
- 2.12 The review for 2026/27 found no operational, legislative or financial factors that require amendment to the current scheme. It continues to run effectively and remains consistent with national requirements. Given the cost and lead-in time of system development, it is more appropriate to maintain the current design while a wider review is scoped during 2026/27 to inform the 2027/28 scheme.
- 2.13 The Council continues to make awards to residents who are experiencing severe financial hardship under the Exceptional Hardship Payments (EHP) scheme and resource is available to support those who have difficulty in paying Council Tax.

3 Options/Alternatives

- 3.1 The Council is required to review its Council Tax Reduction scheme each year and determine whether any changes are needed. The review for 2026/27 found no operational, legislative or financial factors requiring amendment. Given the time required to design and consult on changes, it would not have been possible to implement any amendments for 2026/27. and a full review will be undertaken during 2026/27 to inform the 2027/28 scheme.

4 Preferred Option

- 4.1 The preferred option is that the that Council approves that the existing Council Tax Reduction Scheme remains unchanged for 2026/27.

5 Consultation

- 5.1 Any changes to the 2026/27 scheme require prior consultation with the major preceptor, the GMCA, with regard to the Mayoral Police and Crime Commissioner precept and Mayoral General Services precept including Fire Services. There would also be a requirement to carry out a public consultation.

5.2 No public consultation has been launched and should Council not accept the recommended approach and consider a change to the 2026/27 scheme was appropriate, then the timeline for such a consultation exercise would be extremely limited. The Council has provisionally notified GMCA of its intention not to amend the CTR scheme in 2026/27.

5.3 There is no requirement to undertake public consultation if the scheme is left unchanged.

6 Financial Implications

6.1 Approving the preferred option to retain the existing Council Tax Reduction Scheme for 2026/27 carries no additional financial burden, avoids the costs associated with consultation and system changes, and ensures continued support for residents experiencing financial hardship, while allowing sufficient time for a comprehensive review to inform the 2027/28 scheme.

(Matthew Kearns – Finance Manager)

7 Legal Services Comments

7.1 The legislation states that each year an authority must consider whether to revise its Council Tax Reduction scheme.

7.2 The revision of a scheme is a decision that the legislation reserves to full Council. Any revision to apply to the scheme for the following year must be made no later than 10 March of the preceding financial year.

7.3 No revision of a scheme can occur unless the authority has, in the following order:

1. Consulted with the major precepting authority – The Greater Manchester Combined Authority.
2. Published a draft proposed scheme
3. Consulted with others likely to have an interest in the scheme.

7.4 In order to discharge its duties under the Equality Act 2010, the authority will need to consider the effects of proposals on people with a protected characteristic as defined by the Act, which can be done by way of an equality impact assessment.

7.5 In this circumstance, vulnerable residents and residents generally will benefit from the option proposed i.e no change. It would therefore be unlikely that any legal challenge would ensue from not changing the policy. (Alex Bougatef – Director Legal Services)

8. Co-operative Implications

8.1 The approval of support for residents who are of working age and on low incomes is consistent with and embraces the principles of the co-operative agenda.

9 Human Resources Comments

9.1 None

10 Risk Assessments

-
- 10.1 The recommended option is in line with the decision in previous years to keep the scheme at the same level of deduction. As per previous years there are several risks that continue to be managed during this process:
- Ensuring the scheme is not subject to a legal challenge on the basis of equality legislation, although as the recommended option seeks no changes to the scheme this risk is considered to be extremely low, and an equality impact assessment should consider the effects of proposals on people with a protected characteristic.
 - Ensuring that the scheme is both fair and affordable to the Council in 2026/27, particularly as it will only be based on collection rates information from part of the financial year.
 - There continues to be a challenging financial environment facing both the Council and Council Taxpayers, however, the agreement of the scheme for 2026/27 is one key element of the Council's financial strategy and an unchanged scheme provides certainty for residents in receipt of council tax reduction.
 - To maintain public confidence in the Council's ability to protect public money we will work closely with Department for Work and Pensions where appropriate in relation to those suspected of potentially committing fraud.
(Heather Moore, Assistant Director of Governance)

11 **IT Implications**

- 11.1 There are no IT implications.

12 **Property Implications**

- 12.1 There are no property implications.

13 **Procurement Implications**

- 13.1 There are no Procurement implications.

14 **Environmental and Health & Safety Implications**

- 14.1 There are no Environmental and health and Safety Implications

15 **Community cohesion disorder implications in accordance with Section 17 of the Crime and Disorder Act 1998**

- 15.1 In taking financial decisions, the Council must demonstrate that it has given 'due regard' to the need to eliminate discrimination, promote equality of opportunity and promote good relations between different groups.
- 15.2 Demonstrating that 'due regard' has been given involves:
- Assessing the potential equality impacts of proposed decisions at an appropriate stage in the decision-making process so that it informs the development of policy and is considered before a decision is taken
 - Ensuring that decision makers are aware of equality duties and any potential equality issues when making decisions.

N.B. Having due regard does not mean the Council cannot make decisions which have the potential to impact disproportionately. It means that we must be clear where this is the case

and must be able to demonstrate that we have consulted, understood and mitigated the impact.

15.3 To ensure that the process of impact assessment is robust, it needs to:

- Be specific to each individual proposal
- Be clear about the purpose of the proposal
- Consider available evidence
- Include consultation and involvement with those affected by the decision, where appropriate
- Consider proposals for mitigating any negative impact on particular groups
- Set out arrangements for monitoring the actual impact of the proposal

15.4 As with previous Council Tax Reduction Schemes from 2013, an Equality Impact Assessment has been prepared to try to identify any potential disproportionate adverse impact arising from the proposed scheme and to identify any actions which might mitigate these impacts.

16 Oldham Impact Assessment Completed (Including impact on Children and Young People)

16.1 An Oldham Equality Impact Assessment is set out at Appendix 1.

17 Key Decision

17.1 Yes

18 Key Decision Reference

18.1 FCR-12-25

19 Background Papers

19.1 The following is a list of background papers on which this report is based in accordance with the requirements of Section 100(1) of the Local Government Act 1972. It does not include documents which would disclose exempt or confidential information as defined by the Act:

File Ref:	Background papers are included at Appendix 1
Officer Name:	Adam Parsey – Exchequer Client Manager
Contact:	adam.parsey@oldham.gov.uk

20 Appendices

20.1 Appendix 1 – Oldham Equality Impact Assessment

Council Tax Reduction Scheme 2026-27

completed/last updated by Mark Edmondson on 29/10/2025

Portfolio

Finance, Corporate Services & Sustainability

Directorate

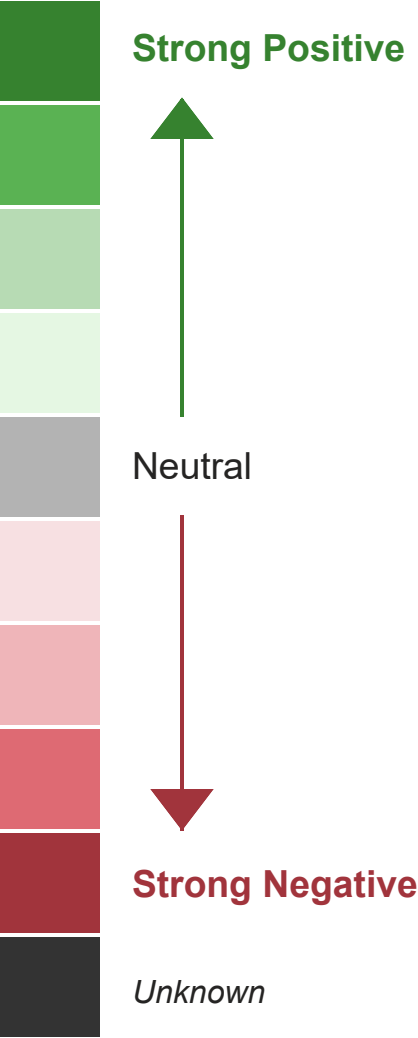
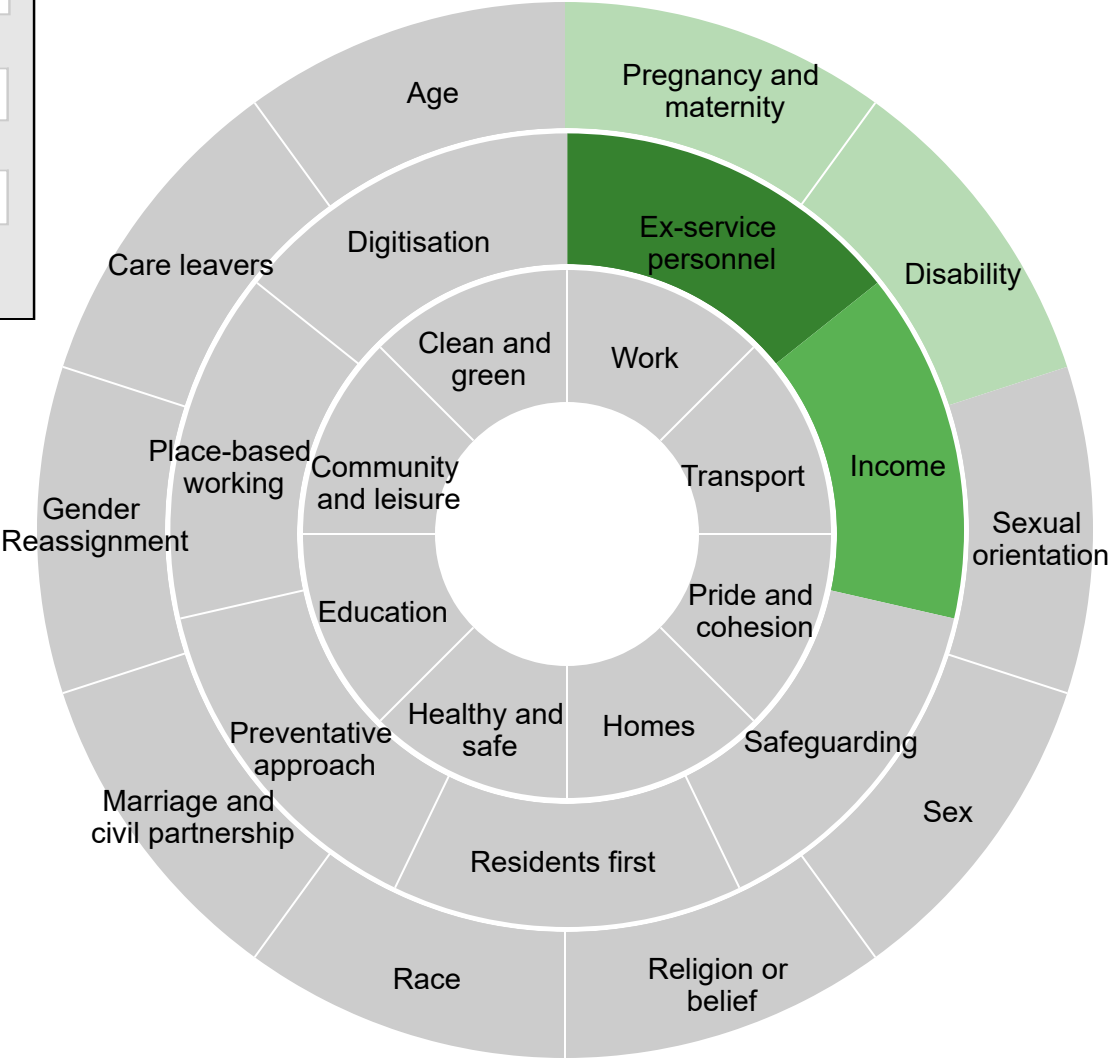
Finance

Service/Team

Finance

Is this IA related to a Budget Reduction proposal?

No



Equality Characteristics

Category	Impact	Likely	Duration	Impact Score	Comment
Age	Neutral	Very Likely	Short Term	0	
Care leavers	Neutral	Very Likely	Short Term	0	
Gender Reassignment	Neutral	Very Likely	Short Term	0	
Marriage and civil partnership	Neutral	Very Likely	Short Term	0	
Race	Neutral	Very Likely	Short Term	0	
Religion or belief	Neutral	Very Likely	Short Term	0	
Sex	Neutral	Very Likely	Short Term	0	
Sexual orientation	Neutral	Very Likely	Short Term	0	
Disability	Moderate Positive	Very Likely	Short Term	2	Residents in receipt of disability premium will have an increased applicable amount (See income), and may be eligible for further Council Tax Reduction.
Pregnancy and maternity	Moderate Positive	Very Likely	Short Term	2	Residents whose household income drops below the applicable amount set by the Department for Works and Pensions may be entitled to Council Tax reduction.

Corporate Priorities

Category	Impact	Likely	Duration	Impact Score	Comment
Digitisation	Neutral	Very Likely	Short Term	0	
Place-based working	Neutral	Very Likely	Short Term	0	
Preventative approach	Neutral	Very Likely	Short Term	0	
Residents first	Neutral	Very Likely	Short Term	0	
Safeguarding	Neutral	Very Likely	Short Term	0	
Income	Moderate Positive	Very Likely	Long Term	4	The CTR Scheme provides financial support to residents who receive a range of benefits including Universal Credit. The amount awarded depends on how much a household's income is less than or equal to their Applicable Amount. The Applicable Amount is the amount of monthly income the government calculates that different categories of household need to live.
Ex-service personnel	Strong Positive	Very Likely	Long Term	8	Income relating to Armed Forces pensions will be disregarding for the purposes of calculating Council Tax reduction.

Future Oldham Aims

Category	Impact	Likely	Duration	Impact Score	Comment
Clean and green	Neutral	Very Likely	Short Term	0	
Community and leisure	Neutral	Very Likely	Short Term	0	
Education	Neutral	Very Likely	Short Term	0	
Healthy and safe	Neutral	Very Likely	Short Term	0	
Homes	Neutral	Very Likely	Short Term	0	
Pride and cohesion	Neutral	Very Likely	Short Term	0	
Transport	Neutral	Very Likely	Short Term	0	
Work	Neutral	Very Likely	Short Term	0	

Negative Impacts

Category	Impact	Likely	Duration	Impact Score	What action can be taken to mitigate the potential negative impacts?	Action(s)	Owner(s)	Timescale(s)	If the negative impacts can't be mitigated, why should the project/decision proceed?
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Strong Positive Impacts that are Possible

Category	Impact	Likely	Duration	Impact Score	What action can be taken to increase the likelihood that positive impacts are realised?	Action(s)	Owner(s)	Timescale(s)
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Report to CABINET

Contractual Arrangements – Azure Cloud Contract – Microsoft

Portfolio Holder: Councillor Abdul Jabbar MBE, Deputy Leader and Cabinet Member for Finance, Corporate Services and Sustainability

Officer Contact: Fiona Greenway – Executive Director of Resources

Report Author: Matthew Gratton, Director of Digital

Date: 17th November 2025

Reason for Decision

To enter into a new call-off contract under a procurement compliant framework agreement in accordance with Contract Procedure Rules to support the ongoing use of Microsoft Azure Cloud for 3 years.

Executive Summary

The report seeks approval to enter into a call-off contract with Microsoft to provide the ongoing use of Azure Cloud, subject to budget approval.

The current contract for the Council's Azure environment will expire on 1st December 2025; however, the Council requires continued use of the Cloud environment and, therefore, a replacement contract is required to commence immediately following the expiry of the current contract.

This report also outlines the progress of the Council's cloud migration strategy, which aligns with Oldham's Corporate Plan "Ready for the Future" (2024-27) and Borough Plan "Pride, Progress, Partnership." These plans emphasise ambition through modernisation, inclusiveness by improving service delivery to all residents, and strength via enhanced resilience, sustainability, and supporting green initiatives like those highlighted in recent Greater Manchester Green City Region Board visits to Oldham.

Phase 1 of the migration is nearing completion, with significant progress in moving servers and storage to Azure.

Phase 2 is forthcoming and will be detailed in a separate paper will complete the transition, allowing the Council to fully move away from on-premises server rooms, realising cost savings, improved cybersecurity, and operational efficiencies. This approach mirrors successful migrations by other UK local authorities, such as Manchester City Council, Oxford City Council, and Bury Council, which have adopted Azure to modernise infrastructure, reduce costs, and enhance service delivery. Phase 2 will also incorporate the Microsoft Intelligent Data Platform, providing unified data management, real-time analytics, AI integration, and enhanced governance for better decision-making and service delivery.

We will be enabling Azure Sentinel which is Microsoft's cloud-native Security Information and Event Management (SIEM) and Security Orchestration Automated Response (SOAR) solution. Increasing our security posture further

Recommendations

Approve a direct award Call-Off Contract under Crown Commercial Services, RM6098 Framework Technology Products & Services Lot 2 Software, for a 3 year term, largely on the call-off terms and conditions prescribed by the Framework Agreement and delegate authority to the Director of Legal Services to formalise any relevant legal requirements, including the execution of the Call-Off Contract as a Deed

Continue with the cloud migration to achieve full cloud adoption by 2027/28 and enable Microsoft Azure Sentinel.

1 Background

1.1 The Council entered a Call-Off Contract with Microsoft, approved by Cabinet in October 2022, for Microsoft Azure migration. The total contract value for Azure is currently £1,027,950 for a 3-year term.

AZURE CALL OF COSTS TO DATE since 2022		
Item	Duration	Cost
Original Projected Consumption costs for 3 years	November 2022 to November 2024	£598,950
DDR - Additional Microsoft Azure Consumption	December 2024 to June 2025	£216,000
DDR - Additional Microsoft Azure Consumption	July 2025 to October 2025	£144,000
New Projects Azure costs	2024 to 2025	£69,000
Remaining Consumption Allocation	On October 2025	£0.00
Total		£1,027,950

As part of the Council's ongoing IT modernisation project, the Council is transitioning from on-premise physical servers to Microsoft Azure cloud services. Phase 1 of the cloud migration was in line with the Data Centre Migration project, which is now nearing completion, with the aim of closing the Civic Centre data centre and moving approximately 68% of servers and 85% of storage to the cloud. This transition will enhance our security, reliability, and flexibility.

As more systems have migrated to Azure, our storage usage has increased under the current contract, alongside natural growth in demand.

As a result, Azure current consumption costs are £34k with a 12% discount. This equates to an anticipated annual spend of approximately £432,000. IT Colleagues continue to review the Azure consumption and where possible use FinOps to maximise the business value to cloud technology.

IT recently engaged a third-party Microsoft partner to conduct a complimentary health check of the Council's Azure environment. This review will include:

Cost Analysis: Integration of monthly Azure costs to ensure the Council is receiving the best possible pricing and identifying any potential savings.

Optimisation Recommendations: Expert advice on how to maximise the use of the cloud environment, ensuring resources are being utilised efficiently and in line with best practices.

The main objectives of the health check are to ensure the Council is leveraging Azure to its full potential, identify opportunities for cost savings and improved efficiency and validate that the Council's cloud environment is secure, compliant, and future-ready.

Migration Progress Overview

Based on current data:

On-Premises Resources: 36 servers utilising 6 TB of storage.

Azure Resources: 259 Virtual Machines (VMs), of which 179 are servers utilising 135 TB of storage.

Notes:

Oldham's Corporate Plan "Ready for the Future" (2024-27) and Borough Plan "Pride, Progress, Partnership" focus on three key goals: ambition (through innovation and modernisation), inclusiveness (ensuring equitable access to services), and strength (building resilient communities). Cloud migration to Azure supports these by enabling scalable digital services, reducing environmental impact through energy-efficient cloud operations, and enhancing cybersecurity to protect resident data, key to community

cohesion and sustainability initiatives, such as those emphasised in recent council activities around green spaces and Northern Roots.

Other considerations:

- a. Community Cohesion Implications, including crime and disorder implications under Section 17 of the Crime and Disorder Act 1998: Enhanced cybersecurity in Azure reduces risks of data breaches, supporting safer digital services for all communities.
- b. Risk Assessments: Risks include migration downtime; mitigated through phased approach and health checks.

2 **Current Position**

2.1 Phase 1 migration is nearing completion, this has already improved service reliability and flexibility.

Oldham Council's current Microsoft Consumption contract ends 1st December 2025 and we need to renew for a further 3 years, Projected costs are included in the finance section 6.1.

3 **Options/Alternatives**

3.1 **Option 1: Do Nothing.**

Choosing not to provide additional funding would mean that the Council cannot continue to use Microsoft's cloud services. This would result in immediate loss of access to all the business systems currently hosted in the cloud, which would cause severe disruptions. Critical services would need to switch to manual processes, significantly delaying day-to-day activities and causing major inefficiencies in service delivery.

Service Impact: The Council will face severe disruptions if the recommended option is not approved. Most of the systems that residents and staff rely on would become unavailable. This would negatively impact the Council's ability to serve residents and maintain essential operations, forcing a return to manual processes for some functions, which would be inefficient and unsustainable.

Option 2: Enter into a new Microsoft call off contract for 3 years, to include the Unified Premium support.

- Complete the migration of remaining on premise servers to Azure.
- Enable Azure Sentinel for SIEM and SOAR use, enhancing Oldham's security and threat detection.

Maintain the Current Level of Resources: The systems we've already moved to

Microsoft Azure are crucial for the Council's daily operations. To ensure we can continue using them without any disruptions, we need to allocate a budget to cover the cloud services used in Microsoft Azure. These services include storage, computing power, and other technical resources that ensure our systems stay online and accessible.

Supporting the Ongoing Migration: We're moving more systems to Microsoft Azure. This aligns with the Council's "cloud first" policy, which prioritizes cloud technology over traditional on-site servers. Additionally, as the Civic Centre is being vacated, we need to ensure that all our business systems are fully migrated to the cloud to remain accessible and functional once we no longer use the Civic Centre's data centre. The allocated budget will support the necessary technical resources to continue and complete this transition.

4 Preferred Option

4.1 Option 2: Enter into a new Microsoft Call off Contract and proceed with full migration to Azure. Phase 2 is being scoped to achieve 100% cloud adoption, this will allow decommissioning of server rooms, saving on energy, maintenance, and real estate. Future cost savings include 20-30% reductions through Azure reservations, Hybrid Benefit, and better cost management. Optimisation strategies: Shut down unused resources, right-size VMs, use savings plans, autoscaling, and storage tiering. These will reduce ongoing costs while enhancing performance, as demonstrated by local government migrations like Node4's support for UK councils, achieving reduced costs and improved scalability.

Cybersecurity benefits include proactive threat intelligence and compliance tools, reducing risks and supporting Council strength priorities. Renewed Microsoft Contact. Continuation of Azure Cloud Services and assessments for further optimisation.

Enable Oldham's use of Azure Sentinel which is Microsoft's SIEM and SOAR solution.

5 Consultation

5.1 Consulted IT teams, third-party Microsoft partner, and senior leaders. Views: Strong support for full migration due to alignment with priorities like sustainability and efficiency. Response: Incorporate health check recommendations into Phase 2 planning.

6 Financial Implications

6.1 Full migration enables significant savings: Elimination of on-premises hardware costs (e.g., maintenance, power), 3-year reserved cost model for Azure, and optimisation yielding circa 20% reductions via strategies like Instance reservations and right-sizing.

6.2 Our current spending in Azure is around £33.9k per month including the 12% Microsoft Discount, (£38.6K with no discount).

The additional increase moving off premise will increase the projected monthly spend in Azure to £34.1k per month including the 15% discount (£40.1k with no discount). We will be re-accessing in a separate Phase 2 cloud paper, to bring this monthly spend down with additional optimisation and consolidations.

Microsoft has introduced a revised Strategic Partnership Agreement (SPA) for public sector customers called SPA24 and provides Oldham with a revised 15% discount instead of the current 12% for Azure costs.

Enabling Azure Sentinel will increase the Azure costs by £60k per year. The Microsoft Unified Premium Support Contract is expected to cost £112k per year.

6.3 Summary Expected Costs are shown below.

Item	Costs Year 1	Costs Year 2	Costs Year 3
Azure Consumption Costs for 3 years; Based on £40.1k per month spend	£481,200	£481,200	£481,200
Microsoft Azure Sentinel	£60,000	£60,000	£60,000
Microsoft SPA24 Discount 15%	-£81,180	-£81,180	-£81,180
Microsoft Unified Premium Support Contract	£112,000	£112,000	£112,000
SubTotal	£572,020	£572,020	£572,020
TOTAL Costs Required (3 years)			£1,716,060

7 Legal Implications

- 7.1 Provided the Council follows the direct award procedure set out in Contract Procedure Rule 8, there are no legal barriers to proceeding with the proposed direct award and contract execution under the CCS Framework, which is a legally compliant framework agreement established in accordance with the Public Contracts Regulations 2015. Procurement has confirmed that the framework expressly permits direct awards and that value for money requirements have been met. Accordingly, a direct award under the framework is lawful and compliant, and a separate competitive tender process is not required.

Legal Services will be available to review the Council-specific requirements of the call-off contract, such as data protection, information security, confidentiality, and liability provisions, prior to execution, to ensure alignment with the Council's standard contractual risk position and compliance with the data protection legislation

Pamela Nsofor (Solicitor)

8. Procurement Implications

- 8.1 Commercial Procurement Unit requests approval to direct award the AZURE Microsoft licensing contract to Insight Direct (UK) Ltd under the terms of Crown Commercial Services, CCS RM6098 Lot 2 Software, this is a compliant public sector framework agreement, details as follows:

Agreement ID RM6098

Start date 10/10/2023

End date 09/10/2027

Regulation PCR2015

Agreement type PCR15 Framework

Justification for Direct Award:

Framework Compliance: Insight Direct is an approved supplier under the Crown Commercial Services RM6098 Framework Technology Products & Services Lot 2 Software, which permits direct award without further competition.

Continuity and Risk Mitigation: Insight Direct is the incumbent supplier and has demonstrated reliable performance. A change in supplier could introduce unnecessary disruption and risk to critical services.

Value for Money: Pricing under the CCS RM6098 framework is pre-negotiated and benchmarked, ensuring competitive rates and full cost transparency. The Crown Commercial Service, in collaboration with Microsoft, has established the Strategic Partnership Agreement 2024 (SPA24). This agreement supports digital transformation across the UK public sector by offering consistent and equitable pricing. Under SPA24, all eligible public sector organisations, regardless of size, benefit from the same level of discount. Notably, Microsoft Azure services for the Councils annual spend will attract a 15% discount, deliver significant savings and ensuring value for money.

Efficiency and Timeliness: A direct award ensures no lapse in licensing coverage and avoids delays associated with a full tender process.

Strategic Relationship: Insight Direct (UK) Ltd is a highly accredited Microsoft partner and an authorised Cloud Solution Provider (CSP). This status enables them to sell and manage Microsoft cloud products, including Azure and Microsoft 365, while offering direct support and value-added services. As one of Microsoft's top 1% global partners, Insight is recognized for its excellence in cloud migration, solution development, and public sector engagement. Their strategic alignment with Microsoft ensures trusted delivery, technical expertise, and access to the benefits of the Strategic Partnership Agreement 2024 (SPA24).

Senga Henstock, ICT Senior Buyer

9 Equality Impact, including implications for Children and Young People

- 9.1 No Impact.

10 Key Decision

- 10.1 Yes.

11 Key Decision Reference

- 11.1 FCR-09-25.

12 Background Papers

12.1 No background papers.

13 **Appendices**

13.1 N/A

Report to CABINET

Spring Brook Capital Works

Portfolio Holder:

Councillor Mohon Ali, (Cabinet Member for Education and Skills)

Officer Contact: Julie Daniels – Executive Director, Children and Young People

Report Author: Andy Collinge (Head of School Support Services)

17th November 2025

Reason for Decision

This report seeks cabinet approval for a capital project that will offer additional places and enhance provision for pupils with additional needs who are based within the Newbridge Trust.

It also seeks approval for the allocation of funding from HNPCA and Basic Need Grant towards the scheme.

Executive Summary

This report relates to a project at Spring Brook Upper School that will enhance existing provision and provide additional provision for pupils with additional needs. These proposals are now developed sufficiently for costs and proposals to be placed before the Cabinet for a final decision. This project will create a total of 36 new places in the school for children with additional needs.

Currently the Local Authority has around £2.8 M of Basic Need funding and £9.6 M of High Needs Capital Allocation Funding. It is proposed that where projects will generate additional places these projects are funded from the HNPCA Grant provision

Project Outlines and Recommendation

Spring Brook Upper School

Spring Brook Upper School is a special school that serves all areas Oldham for children with SEMH and is run by New Bridge Multi Academy Trust. This project will increase access to places for 36 children

Spring Brook Academy is a special school in Oldham that is based across two sites and currently caters for 114 pupils aged between 4-16 years old with a range of Social, Emotional and Mental Health (SEMH) difficulties. Spring Brook lower school, which accommodates KS1 & KS2 pupils, shares its site with Lyndhurst Primary School, a mainstream primary academy. The Spring Brook upper school site, which accommodates KS3 pupils, is based in the Failsworth area of Oldham. Spring Brook lower school is approximately a 10-minute drive from the upper school site.

The central project objective for the Trust is how best to bring Spring Brook's lower and upper school pupils together on one site. The lower school and upper school pupils are to be predominantly based and taught in separate areas. The lower school pupils are to be accommodated within a new teaching block with the upper school pupils continuing to be taught within the existing main school building. KS1 pupils will be taught on the ground floor of the new teaching block with KS2 pupils taught on the first floor. Classrooms are to be designed to accommodate a maximum group size of between 8-10 pupils

The total cost of this project is estimated to be in the region of £1,581,199 (a total of **£1,739,319** when including 10% contingency) following completion of a RIBA stage 2 report by Spring Brook Academy. It is proposed that this project is funded by the LA Basic Need and/or HNPCA Grant.

1 Background

- 1.1 Demand for provision in special schools has risen substantially in recent years. The option recommended in this report provides an opportunity for the Council to provide funding to enhance SEMH provision in line with its Corporate Priorities, to provide a great start and skills for life.

This project will be overseen by New Bridge Academy Trust, there is no HR, Health and Safety, environmental health, property, IT or community cohesion implications arising from the report

2 Procurement Implications

- 2.1 There are no procurement implications arising from the report.

3 Risk Assessments

- 3.1 The Council will require confirmation that academies have appropriate insurance in place before releasing funds for the works.

4 Current Position

- 4.1 LA has a statutory obligation to create suitable school places for all children, this includes those with SEN and EHCP's. It is an ambition of the LA's SEND and Inclusion Strategy to increase places in special schools, where appropriate for children with additional needs. This enables children to have their needs met as part of an inclusive education offer leading to better outcomes for these children. It also has the additional benefit of reducing the need for costly independent provision outside the borough. Over the last 3 years there has been an increase of children with SEMH having to be placed in out of borough provision and independent provision due to lack of sufficiency and this has a significant impact on the High Needs Budget.

5 Options/Alternatives

- 5.1 Option 1: Approve the above capital investment for the project listed above to deliver the ambitions of the SEND and Inclusion Strategy 2023-2027.
- 5.2 Option 2: Do not approve the projects and risk not fulfilling the above strategy.

6 Preferred Option

- 6.1 Option 1.

7 Consultation

- 7.1 All Primary and Secondary schools including all MATS (Multi Academy Trusts) that operate in Oldham.

8 Financial Implications (Capital)

- 8.1 The cost of the associated works including a contingency of 10% is £1,739,319 and will be a charge to the educational capital programme 2025/26, which will be funded from the Basic Needs and/or HNPCA Grant. Any unspent budget will be returned to the provision budget. This school is part of an Academy Trust and as such can reclaim their own VAT, therefore any repayments to the school will be paid net of VAT. Only irrecoverable VAT will be funded by the grant payments.

As the works will be commissioned directly by the school, there will be a need for a grant agreement to detail the amount of funding awarded and the drawdown arrangements as the scheme progresses. Release of funding will be in interim periods.

The cost breakdown analysis of the scheme has been included in the Appendix Document RIBA Stage 2

Paula Buckley – Finance Manager

8.2 Financial Implications – (Resources)

Spring Brook is funded from the High Needs Block of the Dedicated Schools Grant. The High Needs Block covers funding to support provision for pupils and students with SEND who require additional resources to participate in education and learning, from their early years to age 25 in a range of provision including special schools, mainstream schools, alternative provision, and Independent specialist provision. The funding also contributes towards council centrally retained expenditure for High Needs.

Increasing the PAN at Spring Brook by 36 places would result in an additional £911k of required funding per annum from the High Needs Block, split between base and high needs top up funding.

Vicky Gibbons – Senior Accountant

9 Legal Implications

-
- 9.1 The proposal will benefit the students at the schools and further demonstrate the ongoing commitment by the Council to the education of the children of the Borough with particular emphasis upon the most vulnerable children in the borough.

Consideration should be given around the Grant Agreement and there should be liaison with procurement and legal services to satisfy the Council that the document is appropriate, and the funding is utilised correctly.

(Alex Bougatef)

10 Equality Impact Assessment, including implications for Children and Young People

- 10.1 There are no negative implications for vulnerable groups or children and young people.

11 Key Decision

- 11.1 Yes

12 Key Decision Reference

- 12.1 EDS-03-25.

13 Background Papers

- 13.1 SEND and Inclusion Strategy 2023-2027

14 Appendices

- 14.1 RIBA Stage 2 Design and Send and Inclusion Strategy (Annex A)



SEND & Inclusion Strategy

Supporting children and young people who have special education needs and/or disabilities (SEND) and those who may need additional support

2023-2027

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Executive summary

Our borough is a place that puts residents first and is committed to making every service a good service. This strategy is about how we do that for children and young people who have special education needs and/or disabilities and those who may require additional support.

There is an Oldham commitment to constantly work with residents, and this starts with children, young people and their parents/carers, who are equal partners.

Together, we want to improve our performance and create a truly inclusive Oldham. Local area statutory partners; Oldham Council and the Greater Manchester Integrated Care Partnership; are also committed to working in collaboration with partners. This includes children, young people, parents/carers, childminders, early years education settings, schools, post 16 education settings and the voluntary sector.

We all have an important role in working with our partners and stakeholders across the organisational, private, public, voluntary and community sectors to achieve our vision and long-term ambitions. By 2027, we want all children and young people to experience and feel that they are heard and are included.

Over the last few years, we have been making progress through our SEND Improvement Programme. We have reflected the progress of this and the difference it has made so far in our improvement journey.

As a partnership, we are committed to ensuring that support and provision for children and young people continually improves and that we build the trust and confidence of children, young people and parents/carers in Oldham's provision and services across education, health and care 0-25.

As a local area, we are ambitious for all our children and young people, which is why we have high expectations of our childminders, early years' settings, schools, colleges and support services. We want all children and young people in Oldham to have a great start and skills for life in preparation for their continued progress to becoming happy and productive young adults.

Just as importantly, we want all young people to have access to opportunities for training, education, volunteering, employment and apprenticeships to help them gain the skills they need to become independent participants in their local community.

As a local area, we have a strong focus on disadvantage and want to help everyone to access their right to an education, be included and achieve their full potential. We take a residents first approach to ensure that children, young people and parents/carers experiences are fully embedded and influence how we evolve.

Our SEND & Inclusion Improvement Programme underpins our SEND & Inclusion Strategy and provides an overview of current activities to be undertaken to achieve improvements in provision and services across the local area.

Our actions have been specifically identified to improve outcomes for children and young people so that they have the best possible experiences and opportunities to equip them for their future.

We sincerely thank everyone who has invested their time and effort to create our SEND & Inclusion Strategy 2023-2027.

Guiding principles and values

As a local area, we strive for constant improvement through shared responsibility, knowledge about ourselves and commitment to achieve the best outcomes for all our children and young people. Our work is targeted towards improved early identification of need, effective targeting of support, services and provision across education, health and care.

Being knowledge rich will ensure our work responds to the needs of the local area, is evidence based, and takes responsibility for the commitments we make to our children and young people. We will do that in a responsible way through directing our resources to the areas that have the most impact and where children and young people are most at risk of poor outcomes.

When we talk about children and young people with SEND, we include those who are vulnerable for many different reasons and who are likely to need support from multiple services during their life. Many children and young people who have SEND will have lives that have been made more complex by all the different, agencies, policy and legislation that shape the support they might need.

Services may include those from education, health and care, including specialist teachers, child and adolescent mental health services (CAMHS), Children with Disabilities and other social care teams, health services and specialist education support, to name but a few.

Other people around the child or young person, including their families, may also have their own support needs and this is when Early Help services may be required. Throughout all of this, it is vitally important that the voice of the child, young person and their family are kept at the heart of decision making with choice and control being paramount.

Our approach is grounded in what works best to improve outcomes for children and young people so that they can have the best future possible and thrive as part of our local community.

This means being efficient and prioritising what we know we need to focus on to provide the right level of support through education, health and care. This is encompassed in the SEND & Inclusion Improvement Programme, which underpins the commitments we are making through the SEND & Inclusion Strategy 2023-2027.

Oldham's vision for all our children and young people is that they achieve well in their early years, at school, and in further education so that they can find employment, are happy, healthy and fulfilled, and have choice and control over their lives. We believe that all children and young people should be able to:

- Be educated and included in the community where they live.
- Have friendships, relationships and are part of their community.
- Be as independent as possible and do it for themselves.
- Access opportunities that prepare them to be successful in life, learning, volunteering and work.
- Access appropriate high-quality support to build their emotional resilience and improve their positive health and wellbeing.
- Feel, safe and happy when taking part in all the opportunities available to all.
- Feel listened to and actively involved in influencing decisions that affect their lives and communities.
- Feel proud and be ready for life.

Strategic priorities

SEND & Inclusion Strategy	Local area priorities	Young people's priorities	Parents/carers priorities
Priority 1: Early identification and SEN support	A great start and skills for life	Being and feeling safe	Early years SEN support and the graduated response
Priority 2: Health and wellbeing	Healthy, safe and well supported residents	Positive health and wellbeing	Mental health and wellbeing Health services
Priority 3: Community and social inclusion	A clean and green future	Friends, relationships and community	Accessing your community Short breaks and social activities
Priority 4: Joint commissioning for sufficiency of specialist support and provision	Quality homes for everyone	Doing it for ourselves	Independent Living EHCPs and annual reviews Social care
Priority 5: Preparing for adulthood	Better jobs and dynamic businesses	Employment and volunteering	Employment and training Transitions including post-16 Home to school transport
Priority 6a: Communication and interaction: autism	Cross council priorities	Cross council priorities	Included in all the priorities above
Priority 6b: Communication and interaction: SLCN	Cross council priorities	Cross council priorities	Included in all the priorities above

Infrastructure 1: Engagement, participation and coproduction: working in partnership with children, young people, parent/carers and partners, stakeholders

Infrastructure 2: Quality assurance: keeping support and provision under review, including services, settings and individual provision made via EHCPs

Infrastructure 3: Local offer: ensuring that what we say about the local area is of high quality, easy to navigate and performs well

Infrastructure 4: Sustainability: assuring value for money to achieve financial balance and enable the best use of resources to meet need in the local area

Infrastructure 4: Workforce development: creating an inclusive local area through a highly skilled workforce

Governance structure

The improvements we have identified in the SEND & Inclusion Strategy are underpinned by the wider SEND Improvement Programme. Implementation of the programme will be governed by the system-wide SEND Partnership Board and progress will be monitored and reported to Cabinet, Greater Manchester Integrated Care Partnership Governing Body and Oldham education settings (inclusive of early years, schools and colleges) as part of the ongoing cycle of reporting.

Work will be done through the priority workstreams and subgroups, which include representation from education, health and care, 0-25, children and young people and parents/carers.

All strategic groups are responsible for parts of the overall SEND & Inclusion Improvement Programme. Priority workstreams and subgroups meet every half term and report up to the SEND Partnership Board.

There is regular reporting, and this includes narrative about progress, performance data and financial information so that we know how successful we are.

We recognise it is important to be clear about who has responsibility and accountability for delivery of the SEND & Inclusion Strategy at the strategic and organisation level. Roles of key accountable officers and partners are included in our SEND & Inclusion Improvement Programme so that it is plain who is accountable for ensuring the delivery of aspects of the strategy.

We feel strongly that there is shared responsibility and accountability, with all partners, and we want to improve transparency of that through more regular reporting on the local offer.

Ultimately, the benefit of all our work will be felt in the way our children and young people have their needs identified and met across education, health and care, covering the 0-25 age range and in how they are enabled to achieve the best outcomes possible.

What success looks like and how it will be measured

We have included success criteria and performance data in our SEND & Inclusion Improvement Programme, which will show where we were at the beginning of the strategy and how these change over time, to where we want to be.

The overall performance of the local area is measured against national key performance indicators, compared with local, regional and our statistical neighbours (the local areas that are most like us).

The data we use includes *performance data*; things we can measure in numbers or percentages, and *perceptive data*; things we can measure by assessing where we are and how things have improved, according to our partners and stakeholders. We will be reporting our progress regularly, so that we are transparent about what we achieve.

To provide oversight, progress, highlights and challenges will be reported at SEND Partnership Board and in reports to Cabinet throughout the life of the strategy. This will be discussed and monitored at all strategic meetings, workstreams and subgroups and progress against each action will be assessed.

Priority 1 Early identification and SEN support

Headline

The rationale for early identification of potential SEND is that the right provision and intervention can be put in place before gaps in progress and development widen.

Early identification is not restricted to the early years but to any age when concerns might be noticed. We recognise that early and accurate identification of SEND are prerequisites for ensuring effective SEND provision is put into place across the local area.

What we will do

- Review the quality and capacity of the centrally based SEND & Inclusion Service and strengthen the core offer to education settings by providing a clear offer of targeted support for inclusion, regardless of whether there is an education, health and care plan (EHCP) in place.
- Develop an information pack on SEND in the early stages, including a range of information sheets, leaflets and a main poster on SEND to be in education settings and community spaces.
- Ensure that inclusion support is part of a broader, holistic and joined-up offer of across education, health and care.
- Develop a simplified SEN support toolkit of resources that works alongside the graduated response toolkit.
- Work with mainstream education settings to support how they can meet the needs of children and young people at the SEN support and the EHCP level through awareness raising and training at all levels.

Because of what we do

- Children and young people at SEN support level will benefit from having their needs identified and met through robust early identification and intervention in education settings.
- Continuing professional development will increase the knowledge and skills in mainstream education settings, enabling children and young people to be identified and supported at an earlier stage.
- Education settings will have more access to support, including through early years sector support and for whole school SEND and inclusion development.
- There will be a **consistent** approach to early identification across the system, and this will lead to reduced suspensions and exclusions and more children and young people engaging in education.
- There will be assurance for parents/carers that there is fair access to placements in the early years and a full education offer through school and further education and they are not being encouraged to electively home educate their child.
- The Education Inclusion Service will better reflect the needs of the local area.

Priority 2 Positive health and wellbeing

Headline

We see positive health and wellbeing as one of the cornerstones of building an effective life and this starts from birth. As a local area, we take a coordinated and evidence-informed approach to mental health and wellbeing and work in collaboration across education, health and care from the earliest years.

Education settings, along with local area partners, have an important role to play in supporting the mental health and wellbeing of children and young people, by developing approaches tailored to their needs.

What we will do

- Focus on investing in earlier intervention and prevention; and exploring how specialist support can be delivered differently.
- Ensure joint commissioning delivers better, joined-up support by planning pathways of support for specific types of needs, for example autism.
- Put in place effective governance structures and processes to ensure strategic decisions can be taken swiftly and effectively, whatever the make-up of council and the Greater Manchester Integrated Care Partnership.
- Signpost parents/carers to the right support for their own health and wellbeing.
- Create more accessible information, advice and support for young people about the things that are important to them, including sex and relationship education.
- Work with GPs to ensure SEND is considered in the course of their work with children, young people and parents/carers.
- Ensure that there is an effective offer for children and young people who require alternative provision to be put in place because of mental health related difficulties.

Because of what we do

- Parents/carers will know where to get the correct information and advice to support their health needs at the earliest point of time.
- Children and young people will benefit from the people who care for them feeling supported to be as healthy as they can be.
- Children, young people, parents/carers and education settings will have the information they need to know where to get the right support for their mental health needs.
- Parents/carers will have a better understanding of what GPs can offer and will be able to take advantage of what's available, from universal provision to more focused and targeted services, for the right needs and at the right time.

Priority 3 Community and social inclusion

Headline

Friendships, relationships and understanding yourself and who you want to be is a big part of becoming an adult and this starts from the earliest years. As well as understanding what a good relationship or friendship is, finding out more about sexual health, body image and emotions is also important to get around and be included in the local and wider community.

We want to ensure the best experience of community and social inclusion, from the earliest age, so that children and young people are empowered to become as independent, self-reliant and confident as possible, whether this means building and maintaining friendships, joining local groups, taking part in council run activities or accessing services.

What we will do

- Ensure a stronger support network and opportunities for young people who are in the 18 to 25 age phase so that social opportunities don't just stop.
- Work with the voluntary sector to explore what else can be provided in the local community to support community inclusion.
- Advise clubs and providers for activities that are available for everyone, really are available for everyone, regardless of their support needs. This might mean training, support and advice for lots of organisations who provide social and community activities.
- Work in collaboration with partners and stakeholders to provide more information about pathways into sports and afterschool clubs for children and young people who have SEND.
- Promote volunteering opportunities for young people with SEND, which can provide unique experiences. More activities for this, which offer a variety of experiences, will be made available, including within the council.
- Support and signpost parents/carers to wellbeing groups for parents/carers so that they feel empowered and more able to access things in the community for themselves and for their children and young people.

- Work collaboratively with strategic partners to explore and develop the use of personal budgets across education, health and care for young people who have SEND so that they have more choice and control about the services and support they receive.
- Keep all support and provision under review through an agreed schedule to identify what needs reviewing and carrying out focused work to understand how service are working and what needs to change.
- Ensure that children and young people are treated as individuals when professionals are involved, rather than being combined into a general category of need. This also means looking at criteria for access to services and removing diagnosis-based access unless there is a specific and/or justifiable reason for this.

Because of what we do

- Parents/carers will feel supported to have a productive, supportive family life, where families are content and are able to take the opportunities that fit with their own lives.
- Children and young people will:
 - Have a full and stimulating life that includes friends, family and positive relationships.
 - Be able to socialise with friends who support and understand them and explore relationships safely.
 - Feel safe when they are out by themselves and with friends, accessing the local community.
 - Have good knowledge of the clubs and social opportunities they can attend and take advantage of these.
 - Be happy.
 - Be able to put their views across, feel listened to and can express their thoughts and feelings about what is right for them, leading to more power over their own lives.
 - Understand how to make their own decisions in the way that works for them. Benefit from services that are shaped by their own opinions, thoughts and needs.

Priority 4: Joint commissioning for sufficiency of specialist support and provision

Headline

All children and young people are entitled to a mainstream education, and this is the best opportunity for most, including for those at SEN support and EHCP level. Where this is not right for those with the most complex needs, we have high quality special school places, and we want to ensure that there are sufficient places to continue to meet the needs of the local area into the future.

We also want to increase the options for more children and young people, who may need support beyond what mainstream provision can currently offer, to remain in mainstream education. This will be done through the development of a greater range of education options in mainstream primary and secondary schools.

We also want to ensure the right level of provision from support services is available for all children and young people, regardless of their education setting.

What we will do

- Develop a range of 'mainstream plus' options to support children and young people who require provision than is expected to remain in mainstream schools.
- Develop an evidence-informed and collaborative approach to planning places in all types of specialist SEND provision so that there is a transparent plan for how local provision can meet local needs.
- Work with partners to develop more structure and consistency for considering bespoke placements for children and young people with the most complex needs.
- Develop a joined-up network of SEND and inclusion practice across the borough, which is supported by Oldham's early years specialist support services, special schools, mainstream plus practitioners and centrally based specialist services.
- Work with education settings to ensure the best use of the high needs capital funding to improve and enhance the environment to support children and young people with SEND.
- Ensure that there are enough specialist placements to meet the needs of the local population within Oldham and map this out for the period of this strategy and into the future, in consideration of forecast needs.
- Explore what can be done to offer parent/carer support in education settings in partnership with SENCOs and services.
- Ensure that there are sufficient options available for young people when they leave school, including apprenticeships, sixth form, work-based opportunities and further education.
- Promote and expand the inclusive offer in Oldham, so that more young people have access to employment pathways that meet their needs including, through; work placements, work experience, traineeships, supported Internships and apprenticeships.
- Review health provision to ensure the right level of health provision is commissioned to meet the needs of the local area.
- Review and develop our commissioning agreements between the local authority and the integrated care system so that key health services have good transition plans between children's and adults' services.

Because of what we do

- More children and young people will have their needs met in mainstream provision and will access the opportunities this provides so that they are able to make a positive contribution and play an active role in their community.
- Children and young people will benefit from the right support, when they need it, so they can continue to learn new skills and knowledge along with their peers.
- Capacity will be built in education settings across all age phases.
- Children and young people with SEND will have, and make use of, the same opportunities as everyone else because there is an expectation that they will get the right support and encouragement.
- Young people will have more options for post 16 pathways available in their community so that they enjoy a sense of achievement as they continue to build skills, leading to future employment.

Priority 5 Preparation for adulthood

Headline

We recognise that preparing for adulthood starts from the earliest years and runs through childhood and into adolescence and appropriate support in the early years can reduce the amount of support a child, young person or family requires when they are older.

As children and young people grow and develop, they should have the opportunity to get involved in their local community in all sorts of ways. Young people grow older, they may want to live alone, or with others, in their own home.

In Oldham, young people have told us that independent living is more than just about where you live. They also feel that being as independent as possible, is just as important as who you live with. We want to make sure that young people can live as independently as possible, no matter what their circumstances.

What we will do

- Be pro-active in gathering feedback from young people about their aspirations and use this to commission pathways that will enable them to pursue their goals.
- For children in the early years, parents/carers will be supported to access health, education and care services for a better start in life.
- Engage with children and young people who are likely to require further support or bespoke pathways to pursue their aspirations and convene local education providers and wider partners to shape corresponding pathways.
- Expand vocational options to support young people who have SEND onto employment pathways, including supported internships and apprenticeships.
- Engage with local employers, in the private, public and voluntary sectors, and support them to develop opportunities for young people with SEND to make a successful transition to the world of work.
- Help employers to understand the needs of the young people with whom they will be working and to put the right support in place for this to be successful.
- Use learning and good practice to show a wider range of employers how transition into the workplace can be done effectively.

- Ensure that there is a strong, joint local offer of education, health and care options to enable young people with the most complex needs to make a successful transition to adult life.
- Ensure that there are effective processes for all transitions for children and young people and early planning of a young person's transition to adult life that will enable a young person to thrive.
- Develop a joined-up transitions team that includes children's and adults social care and provides a consistent offer relating to assessment, support and services.
- Work with education settings to promote more lessons on life skills, including, travelling, money management, and learning about paying bills.
- Develop accessible information about the EHC process and what this means for sixth form, university and going into work much earlier than it is currently provided.
- Enable parents and carers to access information that helps them to support their children and young people to make decisions about their future.
- Ensure that children and young people begin preparation for adulthood and preparing for change throughout their journey, including at all levels of need, so that work is completed to enable children and young people to begin to make decisions about their future.

Because of what we do

- Children and young people will develop the right skills to be as independent as possible in the way that works for them.
- Young people will benefit from having the right support from the people in their lives, including for making decisions when it comes to their own life and care needs.
- Young people can budget and manage their finances, with the right support when this is needed.
- Children and young people will influence services so that they are better aligned with their priorities.

Priority 6a Communication and interaction: autism

Headline

We want Oldham to be a place that values everyone's contribution to their local communities and makes sure they are welcomed, supported and no-one is left behind. We want to achieve an autism friendly approach across the borough through services that are joined up, proactive and of high quality.

We also want to support education settings, service settings and the wider community to have a good understanding of children and young people who have social communication difficulties and autism, what this can mean, and how they can include them in all opportunities that are available universally. Our work in this area will align with the National strategy for autistic children, young people and adults 2021 to 2026.

What we will do

- Work with community and voluntary sector to promote access to universal social activities for children and young people who have autism.
- Engage with partners and stakeholders to identify the training needs regarding autism and social communication difficulties and identify the priority groups for continuing professional development. This will include partners from health, social care, education, housing, employment, leisure, police and criminal justice services to support continuing professional development.
- Co-design training with young people and parents/carers who have lived experience of autism.
- Build on the Autism in Schools project to provide a sustainable training programme for schools, in partnership with parents/carers.
- Create an autism outreach service for children and young people with communication and interaction needs who are in mainstream education settings.
- Expand vocational options to support young people who have autism onto employment pathways, including supported internships and apprenticeships.

- Implement the complex case panel to ensure sound oversight of young people with the most complex needs, and who may require a continuing high level of support, as they prepare for adulthood.
- Develop education provision and accommodation options for young people who are currently accessing provision outside of Oldham, to ensure that they can be supported as close to home as possible, as they transition to adulthood.
- Review pathways for diagnosis for autism.

Because of what we do

- There will be increased opportunities available in the community as more providers will make reasonable adjustments to be autism accessible for all children and young people.
- Education settings and parents/carers will know how to access training at the right time, to boost their understanding of how autism and social communication difficulties affects children and young people and practical ways to support them.
- Children, young people and their parents/carers will know what they should expect from their school or education setting.
- Education settings will benefit from access to specialist support so that they can build capacity for supporting children and young people who have autism.
- Specialist and mainstream services including health, social care, early years, education, housing, employment, leisure, police and criminal justice are inclusive, accessible and accommodating for children, young people and parents/carers.

Priority 6b Communication and interaction: SLCN

Headline

In Oldham, we want every child and young person to be enabled to communicate to the very best of their ability. Within the early years we want early identification of communication needs to be supported with timely access to strategies, interventions and advice to reduce the longer-term impact of communication needs.

To do this, we want to make sure that there is a high level of skill across the workforce. This is because we want to create a local area that is knowledge rich regarding how to foster and support speech, language and communication needs for our children and young people.

What we will do

- Develop a joined-up speech and language pathway that outlines the offer of services for all children from universal to specialist. This will include supportive strategies that families can use at home.
- Embed consistent messages to parents/carers about the importance of the home learning environment and what is important in supporting communication and language development at all stages.
- Explore funding for investment in SLCN across the continuum of need.
- Strengthen the ways we are promoting SLCN awareness across education settings and services who work directly with the KS3/4 and p-16 SEND population.
- Implement a Secondary Language Link pilot to target children and young people at the KS3/4 phase, whose speech, language and communication needs have not previously been identified.
- Review speech, language and communication needs in the local area against the provision available and act where this needs to be improved.
- Promote and support the speech, language and communication framework as a whole school development for schools.

Because of what we do

- Children and young people are supported by professionals who understand their needs and as a result, are supported to get better outcomes.
- Parents/carers are up skilled in understanding their child's needs in relation to speech, language and communication and, as a result, can support their development in this area.
- Older children and young people who have not had speech, language and communication needs identified at an earlier stage will be supported by professionals who understand their needs and support their development as they move towards adulthood.
- Through Secondary Language Link, secondary phase practitioners can identify and meet speech, language and communication needs informed by an enhanced understanding of language development and how to identify and address needs.

Infrastructure 1: Engagement, participation and coproduction

Headline

Engagement, participation and coproduction are a big part of what is happening in Oldham, and we want this to be embedded successfully at all levels across the local area partnership.

Children, young people and their parents/carers, together with partner organisations, are central to developing an effective local area system for SEND and inclusion. Coproduction is how we want to work and is a core expectation for all service leads, commissioners and providers.

What we will do

- Act on our commitment to sharing challenges and solving problems in a spirit of coproduction through ownership, with children, young people and parents/carers, of the SEND & Inclusion Improvement Programme.
- Ensure that coproduction is meaningful, by engaging at the earliest stage, openly sharing challenges and enabling parents/carers to generate ideas and shape solutions.
- Develop more opportunities for children, young people and parents/carers to influence the local area system at a strategic level and build the capacity of local groups and networks to fulfil this role.
- Introduce an annual cycle of SEND and inclusion events for parents/carers, with an increased level of adult service and housing representatives involved.
- Ensure that education, health and care services work collaboratively with POINT to share accurate information about services/provision and make sure it is communicated effectively.
- Create a parent/carer pack to provide clarity about pathways to support for different aspects of education, health and care.
- Create and promote a lending library of resources for SEND so that parents/carers can borrow resources, rather than spending money to find out that resources are not right for them and their child or young person.
- Hold parent/carer sessions in different areas of the borough on different days, and

at different times so that they fit around busy lives.

Because of what we do

- Parents/carers of early years children, school aged children and young people will be able to access information about their rights and choices without having to ask for it or seek it out themselves because they won't know what they don't know.
- Parents/carers will be an equal partner in strategic and working groups to help to identify issues and implement changes.
- They can also share experiences to help professionals understand some of the impact of SEND on their lives.
- Peer mentoring from other parents/carers will be promoted and will help many other parents/carers.
- Parent/carers will be supported by peer mentors who are well supported themselves by services.

Infrastructure 2: Quality assurance and performance

Headline

We are committed to the delivery of effective provision and services through sound policies, procedures and practice. Quality assurance and performance monitoring is a feature of our work across the local area partnership.

Through this, we ensure continuous service improvement by embedding a culture of shared local intelligence and, where quality and performance issues arise, a commitment to learning and acting.

We believe in partners being accountable for the quality of their work and being prepared to account for the impact on the outcomes for children and young people. We will maintain a robust tracking system, which collates and monitors all performance related to SEND and inclusion to support effective challenge and scrutiny.

What we will do

- Implement the EHC Hub, an online system for developing EHCPs and managing annual reviews.
- Strengthen the support available for the early years sector to identify and submit appropriate request via the online service.
- Develop a comprehensive data set for SEND and inclusion, that brings together education, health and care and publish updates on the local offer website.
- Roll out a whole school audit system for schools and develop an early year's version, to also be implemented.
- Implement a reporting process for the completion and results of the formal termly audit for EHCP's, as outlined in the audit process and publish the results on the dashboard and headline report.
- Develop an outcomes dashboard that focuses on what is important to children and young people and how we measure progress for that.
- Report to SENCos and early years providers, through development days, regarding high quality evidenced based interventions.
- Introduce a system for reviewing all commissioned specialist provision on an annual basis.

Because of what we do

- Parents/carers will be able to access more detail about who is involved with their child or young person's support and provision, and they will have access to information about what they do and how to contact them.
- Children, young people and parents/carers will know the date of their next annual review meeting, as this will be set a year in advance from the previous meeting.
- Data will be more accurate and better reflect the local area position so that more informed decision making is supported, and this leads to more targeted support and intervention.
- Data will be better protected and more accurate as areas of error will be minimised.
- Developments for specialist provision will be identified and good practice shared wider through practitioners.

Infrastructure 3: Local offer

Headline

Oldham's vision is to be a place where children and young people will thrive. The local offer is what is available in the local area for children and young people who have SEND, and their families. The local offer website is what we say about this and provides information on what is available in Oldham.

The local offer website has been produced by children, young people, parents/carers and practitioners working together.

What we will do

- Ensure that children, young people and parents/carers can access information in an understandable format so that they can make informed choices. This includes making sure that information is readily available in all formats, including paper based if this is requested.
- Explore the creation of multiple location public information facilities where parents/carers can collect information on what they need in a format that suits them, including accessing advice from professionals, at their own pace.
- Review statutory responsibilities in relation to the local offer and identify improvements.
- Ensure that the local offer website is SEND related and that all information is related to accessible, Oldham based support and provision.
- Explore the use of an App as another aspect of the local offer.
- Simplify the local offer website in terms of jargon so that the language used is consistent and accessible.
- Empower children, young people and parents/carers, to play a strategic role within the local SEND system, through the parent carer sessions and the annual cycle of SEND and inclusion events for families. Create inclusion groups within settings for children and young people to be a part of.

Because of what we do

- Children and young people will be given information about their rights and choices without having to ask for it or seek it out themselves.
- Children, young people and parents/carers will be confident that they are getting the most up to date and accurate information.
- Parents/carers new to SEND will benefit from jargon free information that will be more accessible.

Infrastructure 4: Sustainability

Headline

To make sure that we can keep improving for children and young people we need to have a grip on how we deliver SEND services for children and young people so that they can be protected and developed.

Sustainability will be achieved through understanding the local context and ensuring that resources are targeted based on that knowledge and what we know works well.

What we will do

- Participate in the Delivering Better Value programme in partnership with the DfE.
- Carry out a review and formal consultation, of the resource allocation system of funding related to EHCPs, across all age phases and education settings, both mainstream and special.
- Carry out a review and formal consultation of p16 SEND provision to identify how the range of pathways can be improved.
- Review and update the SEND Transport Policy.
- Create the opportunities for creative and transparent discussions with parents/carers about transport options, with a focus on promoting independence.
- Share good practice in decision-making and transport assessments, co-production of policies and guidance with parents/carers.
- Create a full and creative range of support options for travel to school.

Because of what we do

- The Delivering Better Value programme will support a more targeted budget, in relation to specific identified areas and this provides confidence that resources are being managed effectively.
- There will be confidence that the resource allocation system for EHCPs is fit for purpose, fair and delivers the best system for children and young people.
- Statutory processes will be managed effectively, and this will provide confidence in the system for all partners and stakeholders.
- P16 provision will be in line with statutory requirements, creating a more equitable system for children and young people.

Infrastructure 5: Workforce development

Headline

To ensure that children and young people benefit from the best support that enables them to reach their potential we need a workforce that is skilled, knowledgeable and progressive.

We want our partners to feel confident in their ability to deliver the best possible system. This means having access to the most effective continuing professional development opportunities that are accessible and fit in with the demands of daily work.

What we will do

- Work with regional partner local authorities to define the training offer across the region that promotes access to employment for children and young people.
- Review the training currently available in the borough and identify any gaps for development and create a suite of training available to in different formats.
- Link training and development to the findings through audits, emerging themes and actions plans.
- Establish an autism training steering group to lead on planning and implementation of autism training across the local area.
- Review all current training related to SEND and inclusion and plan an appropriate programme based on the findings.
- Develop and deliver a continuing professional development programme targeting whole school development for SEND and inclusion.
- Ensure the early years sector has access to a professional development programme for SEND and inclusion.
- Promote use of the Graduated Response Toolkit and develop this further.
- Develop and promote a comprehensive transition support pack that covers all key transitions.
- Develop more creative methods for continuing professional development, for example, webinars, podcasts and online courses.
- Build a development offer for professionals and practitioners and use as part of the induction programme to Oldham as well as a maintaining competency programme.

Because of what we do

- Children and young people benefit from better transition planning, ultimately leading to work-based activity, and this improves their outcomes in later life.
- Children and young people benefit from an upskilled workforce who have a better understanding of SEND, and their obligations under the SEND Code of Practice, and can apply this knowledge and understanding.
- Increased awareness and confidence of staff in identifying SEMH and related needs leads to better provision for children and young people.
- All children and young people are supported by a skilled workforce that identifies their needs at the earliest opportunity enabling appropriate support and plans to be put in place.



SEND & Inclusion Strategy 2023-2027: Annex A:

Sufficiency of specialist places to meet the needs of children and young people with special educational needs and/or disability (SEND)

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5. Considerations
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8. Collaborative approach
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January 2023

1. Introduction

Across the local area, there is a commitment to deliver high quality education for all children and young people, including those who have special educational needs and disabilities (SEND). Our SEND & Inclusion Improvement Programme underpins the strategy and clearly set out the local area's commitment to delivering high quality support and provision across all our schools and educational settings, enabling the best outcomes for every child and young person over six key priorities and five key enablers.

All children and young people are entitled to a mainstream education, and this is the best opportunity for most, including for those at SEN support and EHCP level. Where this is not right for those with the most complex needs, we have high quality special school places, and we want to ensure that there are sufficient places to continue to meet the needs of the local area into the future across all our mainstream and specialist provision.

We recognise that there are children and young people, who may need support beyond what mainstream provision can currently offer and we want to increase the options for this group. This will be done through the development of a greater range of education options in mainstream primary and secondary schools. In addition, further consideration will be undertaken regarding the development of provision in early years and post sixteen education as part of the longer-term strategy.

We also want to ensure the right level of provision from support services from education, health and social care is available for all children and young people, regardless of their education setting.

The sufficiency element of our strategy is monitored and developed through the Joint Commissioning & Sufficiency Partnership, which focuses on joint commissioning for sufficiency of specialist support and provision.

To explain how we are going to achieve our ambitions for the children and young people of Oldham, this annex forms part of the overall SEND & Inclusion Strategy 2023–2027 and focuses specifically on the SEND specialist place sufficiency aspect of the strategy.

2. Aims and ambitions

The overall SEND & Inclusion Strategy details all that we are aiming to achieve across the local area to get the best outcomes for children and young people. The sufficiency annex sets out further detail about how the local authority and partners will address the fundamental challenges being faced in meeting increasing demand for the range of specialist places we need to sustain for children and young people with SEND within the resources available. This will be done in collaboration with partners and stakeholders.

The sufficiency annex to the main SEND & Inclusion Strategy will be based upon the following objectives:

- Ensuring children and young people with SEND have access to the right type of school placement and provision which best meets their needs, and which is within their community. This includes those who have been categorised as having needs relating to social, emotional and mental health; autism and/or speech, language and communication needs.
- Embedding a partnership-based approach, to ensure the appropriate range and capacity of provision is available in local mainstream schools, academies, trusts and specialist settings to enable the needs of a greater number of children and young people to be met, as part of an inclusive culture. This builds upon our commitment expressed in the Education Improvement Strategy.
- Building a sustainable system that provides value for money and the most effective use of available resources, which continues to underpin the strategy and results in improved settings, environments and skill sets that get the best outcomes for children and young people.
- Ensuring that children, young people and their families are at the heart of planning support and provision.

In line with previous years developments, statutory partners continue to work closely to ensure, where possible, that children and young people with SEND do not have to travel out of the borough to have their educational needs met through early identification and support. Work in this area has been undertaken in parallel with improvements to the quality and efficiency of education, health and care plan processes. This is to enable children and young people who require ongoing specialist support to be placed in the best possible provision and have their needs met through a stable and enriching school life.

The strategy further sets out its objectives to continue to address pressures within the SEND system, placing a renewed focus on developing capacity locally through re-setting the balance in favour of borough based resource and satellite provision which is closer to children and young people's home and community, and which prevents the need for significantly more costly, independent provision outside of the borough.

Improving personalisation, through things such as personal budgets, alternative provision and education other than at school is also a key priority to create a system which promotes independence, confidence and aspirations and enables children and young people to make a successful transition to adulthood. Annex B of the SEND & Inclusion Strategy 2023-2027 will focus on these aspects.

3. Rationale and evidence of demand

In recent years, there has been a significant increase in the number of children and young people who have an Education, Health and Care Plan (EHCP) resultant in the current figures shown in table 1.

SEND for school aged children and young people (*excludes early years and post 16*)

Phase	Total	Special place	SEN Support	EHCP	Total SEN
Primary	26400	22365	3449	586	4035
Secondary	17985	15724	1889	372	2261
Special	1183	0	18	1165	1183
PRU	37	0	37	0	37
Total	45605	38089	5393	2123	7516

Table 1: School census January 2022

Numbers continue to show that Oldham has a higher number at the EHCP level and lower at the SEN support level than statistical neighbours and the national average.

	Oldham	Stat' neighbours	National
Nº of school age pupils	47169	530311	9000031
No of pupils with SEND	7662	89820	1485409
% Who have an EHCP	4.7%	3.9%	4.0%
% At SEN support level	11.5%	12.9%	12.6%
% Total who have SEND	16.2%	16.8%	16.6%

Table 2: EHCPs and SEN support comparisons. School census January 2022

Latest national data, published in June 2022 by the DfE, shows that the most common type of need for children and young people who have an EHCP is autism and for those who are identified as requiring SEN support is speech, language and communication needs (SLCN). This is also reflected in Oldham and there has been an increase in those being diagnosed and/or presenting with autism, both nationally and in Oldham.

In Oldham, for children and young people with an EHCP, data shows us that, autism is the most common primary type of need, with **42%** of children and young people in Oldham schools and settings having this primary type of need. SLCN and SEMH are also significant with **17%** of the Oldham schools EHCP cohort having a primary need of SLCN and **12%** SEMH (Jan Census 2022).

Despite the identified number of children and young people in Oldham schools who have an EHCP with a primary need of SLCN, this may not account for the true level of need in this area. This is because many children and young people will have been categorised as having social, emotional and mental health (SEMH), needs at secondary school whilst at primary they may have been more likely to be identified as having SLCN. This indicates that when they move to secondary school, their SLCN has been under identified or mis-categorised.

Table three shows the latest forecast for Oldham children and young people who have an EHCP, or may need one in future, if we do not change how we do things.

	ASC	HI	MLD	PD	PMLD	SLD	SEMH	SpLD	SLCN	VI	MSI	Other	Totals
2015	371	41	123	82	54	109	153	23	170	17	0	7	1150
2016	411	45	134	90	55	119	167	28	183	20	0	14	1266
2017	498	53	152	98	60	135	191	44	228	24	0	7	1490
2018	592	62	192	118	71	141	239	47	268	29	0	9	1768
2019	668	68	224	125	72	146	283	51	311	30	1	69	2048
2020	770	72	249	136	76	123	321	79	339	32	3	50	2250
2021	803	67	240	143	80	111	340	89	382	32	3	23	2306
2022	914	75	260	150	93	116	405	96	513	39	4	35	2700
2023	1027	76	272	157	97	105	458	99	615	47	6	35	2994
2024	1130	84	299	173	107	116	504	109	677	52	7	39	3293
2025	1243	92	329	190	117	127	554	120	744	57	7	42	3623
2026	1367	101	362	209	129	140	610	132	819	63	8	47	3985
2027	1504	111	398	230	142	154	671	145	900	69	9	51	4384
2028	1654	122	438	253	156	169	738	159	990	76	10	56	4822
2029	1819	135	482	278	172	186	811	175	1090	83	11	62	5304
2030	2001	148	530	306	189	205	893	193	1198	92	12	68	5834

Table 3: projected numbers of EHCPs up to 2030, following the current trajectory (actuals at Jan census to 2022 (2023 TBC in spring 2023), forecasted from 2024 based on average 10% national increase).

For all statutory school aged children and young people with an EHCP reviewed and maintained by Oldham LA, **55%** are educated in special schools (inc. INMSS and maintained special schools) The national average is **34%** and for metropolitan boroughs is **9.9%**. Table 4 shows what this means in numbers of children and young people.

	2017	2018	2019	2020	2021	2022
Mainstream	589	648	782	868	932	982
Special	701	794	887	962	1003	1093

Table 4: special school places 2017 – 2022

4. Pressure on high needs funding

INMSS monitoring provides up to child level data to understand the SEND needs required to both develop provision that children in INMSS settings could transition back and therefore provide appropriate local provision. This also enables us to forecast and understand the needs of the population to allow a focused approach to capacity development for specific identified needs, namely autism, SLCN and SEMH.

Tables five and six show an overview of the use of INMSS placements highlighting a reduction on the dependence on the use of these schools due to developments to date.

Financial year	INMSS placements: out of borough	Total costs
2019/2020	94	£3,952,846.00
2020/2021	77	£4,282,601.00
2021/2022	67	£3,973,022.00
2022/2023	62	£3,609,940.00

Costs are based on full academic year costs. Latest information as of 21 October 2022.

Table 5: INMSS placements outside of Oldham.

Financial year	INMSS placements: in borough	Total costs
2019/2020	50	£802,440.00
2020/2021	46	£1,189,946.00
2021/2022	30	£935,443.00
2022/2023	24	£890,382.00

Costs are based on full academic year costs. Latest information as of 21 October 2022.

Table 6: INMSS placements in the private sector located in Oldham.

Previous reports have demonstrated that the continual long-term dependence on out of borough and independent non-maintained special schools (INMSS) is not favourable as a long-term sustainable option when viewed against steadily rising increase in needs for these cohorts of children and young people.

The INMSS data full year forecast figures for 2022/23 indicate that 30 children and young people were/are placed in INMSS settings with a primary need of autism at a cost of £1,478,153.40. This is on average £49,000 per place.

The INMSS data full year forecast figures for 2022/23 indicate that 32 children and young people were/are placed in INMSS settings with a primary need of SEMH at a cost of £1,394,534.50. This is on average £44,000 per place.

Primary need	INMSS number	Cost
Autism/SLCN	30	1, 478,153.40
SEMH	32	1, 394,534.50
Other	24	1, 627,634.10

Table 7: Costs of INMSS related to specific areas of need.

Whilst numbers in INMSS continue to reduce, through our concerted efforts, the cost of INMSS rises due to increases in prices in the independent sector, which the LA has no control over. We would like to see more of this funding remaining in Oldham schools and education settings. Our strategy, therefore, is to work towards ensuring more of our resources stay within Oldham education settings.

5. Considerations

The continuing work on SEND sufficiency has clearly identified a gap in educational provision for children and young people with autism/SLCN and/or SLD/SEMH, whose needs are not currently being met in mainstream schools, resourced provision or local special schools. This often results in children and young people being placed in independent non-maintained special school (INMSS) provision out of borough, or in-borough independent settings.

Oldham does have an autism specific special school; however, this is targeted at children and young people who can follow a GCSE pathway and curriculum. There is currently a gap in specialist provision for children and young people who have the following needs:

- Communication and interaction (autism/SLCN) combined with moderate to severe learning difficulties.
- SEMH and combined severe learning difficulties.

There are currently only three established resource provisions in Oldham, providing **36** places in total. This 'mainstream plus' provision needs to grow to enable children and young people to be educated in the borough that they reside and ensure access to the right provision.

Whilst much of the capacity development is providing short and medium term cost avoidance, to ensure resources stay within the borough, the growing need for capacity of in-borough provision set against the rise in EHCP's requires a multi-faceted approach. Utilising early identification and support, graduated response as well as the development of in-borough provision with our maintained and academy partners must be a key part of this.

Demand for EHCPs and specialist places continues to rise and the council's ability to create more places locally within acceptable timescales is compromised. In addition, the complexity of some children and young people's needs, combined with the lack of mainstream specialist places, has meant that the council has been required to make greater use of INMSS to deliver provision.

There is potential to impact on the use of INMSS places currently however this would require several dependencies not least parental consent, appropriate key phase transitions of children in a particular year group.

There is a real concern on the long-term ability to impact on the use of INMSS places without having the ability to develop provision within the local area at the pace and scale needed to affect this. However, Oldham remains a partner within the Northwest Framework to secure specialist placements if required.

Further issues include:

- The unknown cohort of 'in-year' identification of children and young people who have SEND add to additional EHCP number, and these prove difficult to forecast, e.g. families moving into the area, other local authorities placing in Oldham schools, etc.
- Developing the market to encourage more school settings and trusts to develop and/or expand provision in the borough in the short and medium term.
- Development of forecast data for post 16 and review of statutory post 16 ESFA requirements that impact on the rising demand for placements up to the age of 25.
- The success of all identified projects with various approvals required from, capital, planning, providers and the possible impact of BSF/PFI initiatives.

6. SEND sufficiency projects 2023-2027

Progress has already been made on sufficiency projects including Medlock Valley (6 places) and Newman R C (6 places, PILOT only) plus Kingsland School scheduled for January 2023 (12 places). This will provide a further 24 places for the 22/23 academic year and a further 12 the following year.

In addition, an expression of interest went out in the Spring Term 2022 to all schools and settings, requesting they express an interest should they wish to provide resource or satellite provision.

From this initial expression of interest, **17** primary schools, **2** secondary schools and **1** FE provider have requested to be considered for mainstream plus provision. Due to the demand for mainstream plus places in secondary a further secondary mainstream plus provision will be needed in phase 1.

A further 6 mainstream plus provisions will open prior to 2025, giving an additional 108 places in total (36 in 2023, 2024 and 2025).

Development discussions have continued as part of the SEND sufficiency strategy work, assessing the available data to target provision against the needs of children and young people.

This highlights further the need for increased provision related to communication and interaction needs (autism and speech, language and communication needs (SLCN)) as well as SEMH needs.

Discussions continue with education providers to support the LA in its aims of the send sufficiency plan and its drive to significantly reduce the impact on the high needs budget by ensuring children and young people remain in local provision with a reduction in the use of INMSS.

Resource provision	Primary need	Total cost per place*	2022/23	2023/24	2024/25	2025/26	Total
Kingsland School	Autism/SEMH	£19,869	12	0	0	0	12
Medlock Valley	Autism/SEMH	£15,127	6	6	6	0	18
Secondary 1	Autism/SEMH	£19,869	6	6	6	0	18
Secondary 2	Autism/SEMH	£19,869	0	6	6	6	18
Secondary 3	Autism/SEMH	£19,869	0	6	6	6	18
Secondary 4	Autism/SEMH	£19,869	0	6	6	6	18
Primary 1	Autism/SLD	£15,127	0	6	6	6	18
Primary 2	Autism, SLD	£15,127	0	6	6	6	18
FE 1	Autism, SEMH	£19,869	0	6	6	6	18
*Subject to review of resource allocation system.			24	48	48	36	156

Table 8: Planned creation of resource provision/mainstream plus provision.

7. High needs provision capital allocations 2021 – 2024

Those SEND projects requiring capital investment have and are being supported through the Special Provision Capital and the High Needs Provision Capital Allocation Grants.

The current sufficiency plan and model is based on developments in the short and medium term with mainstream plus provision developments, but with the recent allocation of additional funding through the High Needs Capital Allocation Grant this could allow for additional capacity to meet the needs sooner.

Oldham have been awarded further funding for 2022-23 and 2023-24, from the DfE's high needs provision capital allocation grant. This creates a cumulative total of 6.0m (from the original 0.8m allocated in 2021-22).

High Needs Provision Capital Allocations 2021-24 <i>(published March 2022)</i>			
Updated HNPCA 2021-22	Updated HNPCA 2022-23	Additional HNPCA 2023-24	Total HNPCA 2021-24
£830,009	£2,189,364	£3,012,464	£6,031,837

Table 9: HNPCA 2021 - 2024

This funding is to support the development of additional capacity and enhancing school/setting environments to support children/young people with SEND. This is great news for Oldham as it will enable more sufficiency projects to proceed, thereby enhancing the specialist places available within the borough. This will be managed through the Education Provision Team, which reports into the Education Provision Group (EPG).

The potential capacity expansion programme based on the forecast data for children and young people with EHCP's, as well as recognition of those currently in INMSS and their respective year groups would look to provide the additional capacity we need.

8. Collaborative approach

The continuing development discussions with schools regarding additional capacity at mainstream school sites has the potential to align itself to a positive inclusive model. This supports the aims of providing local education places for children and young people with SEND in Oldham and may be more practical in effectively supporting the educational needs and demands of all children in Oldham long term, and successfully impacting, to the extent needed, to reduce the high needs block in the long term that will be sustainable.

Most children and young people should be able to access the support they need to thrive in their local mainstream setting, without the need for an EHCP. To ensure we can achieve this, we need to create a financially sustainable system that provides value and ensures the best outcomes for children and young people.

Previously, we have considered the increase of special school places, however national developments and drivers have caused pause for thought. The Education Act 2011 changed the arrangements for establishing new schools and introduced section 6A, which is known as the academy or free school presumption which, without central government funding, would require the LA to provide the capital to fund any development. In addition, government plans can lead to significant aspects of changes of the education landscape potentially having a significant impact on local authorities, that is not yet known.

Monitoring of the use of INMSS placements and the tracking of year groups as part of the ongoing dedicated schools grant sustainability improvement programme, provides information that supports the development of in borough provision. This will allow us to review the use of INMSS whilst also monitoring the local increases identified in the data around needs and EHCP's. Also of note is that Oldham are part of the SEND North West Framework, used to identify possible placements within an agreed funding range. This is something we need to drive forward.

An additional benefit to our improvements will be enabling children and young people to participate in activities that build self-esteem and independence skills such as those delivered through the Short Breaks Play and Leisure offer.

In summary

The priorities we have identified as part of the overall SEND & Inclusion Strategy are intended to further reduce the need for INMSS because of strengthening the range of provision with the borough. This will enable more of the high needs block to remain within the borough, and it will reduce the social costs for children, young people and families.

To address sufficiency in the best way to meet the needs of children and young people in Oldham, we are proposing to establish sufficiency of specialist places by working in partnership with schools/settings and trusts to develop specialist provision within mainstream schools.

Our commitment is that children and young people have their needs identified promptly, with appropriate support and provision put in place within Oldham at the earliest opportunity and at the level they need it.



SEND & Inclusion Strategy 2023-2027: Annex B: Sufficiency of alternative provision to meet the needs of children and young people who need an alternative approach to access education

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- 14. SEND and alternative provision sufficiency projects 2023-2027
- 15. Collaborative approach
- 16. SEND & Inclusion Strategy 2023 – 2027

1. Introduction

Across the local area, there is a commitment to deliver high quality education for all children and young people, including those who have special educational needs and disabilities (SEND). Our SEND & Inclusion Improvement Programme underpins the strategy and clearly set out the local area's commitment to delivering high quality support and provision across all our schools and educational settings, enabling the best outcomes for every child and young person over six key priorities and five key enablers.

Alternative provision (AP) is defined by the Department for Education (DfE) as: Education arranged by local authorities for children and young people who, because of exclusion, illness or other reasons, would not otherwise receive suitable education; education arranged by schools for those on a fixed period exclusion; and those being directed by schools to off-site provision to improve their behaviour.

Depending on the reason a child or young person requires AP, placements can be commissioned by the local authority or directly by schools. It is up to whoever is commissioning the support to determine the most appropriate AP provider. In every case, partnership working with parents/carers is crucial and it is expected that consideration of the views of the child, young person, their parents/carers and other professionals.

Types of AP providers include AP academies, AP free schools, pupil referral units (PRUs), hospital schools, independent providers, further education colleges, and voluntary sector providers. In Oldham, we have a range of this provision and have carried out a review of the sufficiency of places currently available and what we may need in the future.

All children and young people are entitled to a mainstream education, and this is the best opportunity for most, including for those who are vulnerable and who may require an alternative approach. Where this is not right for those with the most complex needs, we have good provision in our pupil referral unit (PRU), and we want to ensure that there are sufficient places to continue to meet the needs of all our children and young people into the future across all our mainstream and alternative provision.

We recognise that there are children and young people, who are at risk of disengagement and may need support beyond what mainstream provision can currently offer and we want to increase the options for this group, in line with the DfE SEND & AP Plan to create targeted in school, transitional/time limited and longer-term AP. This will be done through the development of a greater range of alternative provision options in mainstream primary and secondary schools. In addition, further consideration will be undertaken regarding the development of provision in post sixteen education as part of the longer-term strategy.

We also want to ensure the right level of provision from support services from education, health and social care is available for all children and young people, regardless of their education setting.

The alternative provision element of our strategy is monitored and developed through the Joint Commissioning & Sufficiency Partnership, which focuses on joint commissioning for sufficiency of specialist support and provision as a continuum of need across SEND and vulnerable groups.

To explain how we are going to achieve our ambitions for the children and young people of Oldham, this annex forms part of the overall SEND & Inclusion Strategy 2023–2027 and focuses specifically on the sufficiency of alternative provision as part of the overall strategy.

2. Aims and ambitions

The overall SEND & Inclusion Strategy details all that we are aiming to achieve across the local area to get the best outcomes for children and young people. The AP sufficiency annex sets out further detail about how the local authority and partners will address the fundamental challenges being faced in meeting the need for CYP, particularly those with SEMH in accessing alternative provision AP. This will be done in collaboration with partners and stakeholders.

The AP sufficiency annex to the main SEND & Inclusion Strategy will be based upon the following objectives:

- Ensuring children and young people with SEND and specifically SEMH have access to the right type of alternative school provision and support, for the most appropriate period and which is based on sound and consistent principles of early identification, where provision is matched to needs.
- Embedding a partnership-based approach, to ensure the appropriate range and capacity of alternative provision is available and widely understood, ensuring that children, young people and their families are at the heart of planning support and provision.
- Building a sustainable system that provides value for money and the most effective use of available resources, resulting in improved settings, environments, skill sets and outcomes for children and young people, through workforce development, targeted support and improved systems for identification of need.
- Embedding a partnership-based approach to the quality assurance of alternative provision in line with an evidenced based approach (AP-Quality-Benchmark-Toolkit-Summary (integrated.org.uk)) and in a manner which promotes sharing of good practice.

In line with Oldham principles of coproduction, statutory partners and stakeholders continue to work closely to ensure that children and young people can access appropriate alternative provision, as required, from a coordinated range of offers, building on existing provision and resources.

The aspiration of the AP strategy is to strengthen and improve a system of provision which has a greater focus on personalisation of educational opportunity and curriculum, which is purposeful in promoting independence, confidence and aspirations, raising skills and enabling children and young people to make a successful transition to adulthood.

Work in this area has been undertaken in parallel with improvements to the quality and efficiency of education, health and care plan processes and wider sufficient strategy and is consistent with the wider strategy in its overriding objectives to address pressures by placing a renewed focus on developing capacity locally.

3. Rationale and evidence of demand

In recent years, and since the Covid 19 pandemic, there has been a significant increase in demand for AP.

Schools and Settings commission their own AP for all non EHCP pupils and a Collaborative Provision Register has been implemented as part of the Oldham Pledge:

<https://www.theoldhampledge.co.uk/>

All schools and settings submit returns to the local authority for any children or young people on a reduced timetable and these are discussed at Team Manager level with schools and on the strategic monthly dashboard.

Phase	2020/2021			2021/2022			2022/2023		
	Total	Total EHCP	Total SEN Support	Total	Total EHCP	Total SEN Support	Total	Total EHCP	Total SEN Support
Primary	20	15	3	78	27	37	42	17	24
Secondary	69	7	26	317	18	79	282	35	99
Special	12	12	0	14	14	0	11	11	0
PRU				12		12	13		13
Total	101	34	29	421	59	128	348	63	136

Numbers of CYP on reduced timetables (3-year period)

Table 1: Reduced Timetable returns 2020 - 2023

The LA commission alternative provision for all those with an EHCP, those who have been permanently excluded from school and those that are unable to attend school for medical reasons.

Kingsland School is the LA commissioned PRU and provider of alternative provision, providing 70 places for children and young people that have been permanently excluded, 30 places for pupils that are unable to school due to medical reasons and 12 places for children and young people with an EHCP that have a primary need of emotional or mental health difficulties.

Work is underway for a second site for Kingsland to provide a step out provision for 30 pupils at risk of exclusion.

Oldham LA exclusion statistics are below. Permanent exclusions have increased over a 3-year period whilst suspensions have decreased year on year from 2021 – 2023. Schools and settings are using a small number of Alternative Providers currently to reduce suspensions.

	Suspensions	% Difference	PEX	% Difference
2020/2021	1523		39	
2021/2022	2655	74%	45	15%
2022/2023	2478	-7%	62	38%

Table 2: PEX and Suspensions data 2020 – 2023

Demand for AP and EOTAS for pupils with EHCPs has also increased in recent years and has significantly risen over the last 12 months, due to pupils with EBSA after the pandemic and the local authority SEND & Inclusion Strategy, ensuring Oldham children and young people are educated wherever possible in the borough that they reside.

Table 3 shows demand for AP and EOTAS. Please note the decrease in demand for high cost out of borough placements and high cost in borough independent placements as Oldham LA commissions more AP and more bespoke provision is created in the borough to meet the needs of our children and young people.

	CYP with EHCP on AP (cumulative)	EOTAS (number named in provision in EHCP)	Number of INMSS (out of borough)	Number of INMSS (in borough)
2020/2021	39	5	70	49
2021/2022	31	6	61	47
2022/2023	47	12	59	29

Table 3: demand for AP and EOTAS 2020 – 2023

For context regarding PRU provision, the PAN for Broadbent Rd (PRU) is 70. This was increased from 40 in 2020/21 due to demand. The PAN for the Specialist Learning Centre (SLC) is 30. Permanent exclusion (PEX) numbers dropped during the pandemic, likely due to children and young people not being in school. All accessing both sites have been registered at the SEN support level (K code) with most going on to have EHCPs issued. This indicates how crucial it is to review and plan for AP in the wider context of SEND and inclusion.

Provision	Year	Total
PRU	2022/23	81
SLC	2022/23	47
PRU	2021/22	66
SLC	2021/22	30
PRU	2020/21	78
SLC	2020/21	24
PRU	2019/20	116
SLC	2019/20	31
Referrals		
Referrals to SLC	2022/23	81
Referrals to SLC	2021/22	70

Table 4: number of pupils who accessed PRU and SLC by 16/06 every academic year

4. Considerations

Local authorities have a statutory responsibility for arranging suitable full-time education for children and young people permanently excluded from school, and for others who would not receive suitable education without such provision. This applies to all children of compulsory school age living in the local authority area, regardless of whether they are on a school roll, and what type of school they attend. The provision of full-time education for excluded children and young people must begin no later than the sixth day of the exclusion.

There is no statutory requirement for how soon full-time education should begin for children and young people placed in AP for reasons other than exclusion. However, the guidance states that local authorities should ensure that they are placed as quickly as possible. In addition, although good AP will differ depending on the circumstances of the child or young person, there are common elements that AP should aim to achieve, according to the DfE, including:

- Good academic attainment on par with mainstream schools, particularly in English, mathematics and science (including IT), and with appropriate accreditation and qualifications.
- That the specific personal, social and academic needs of children and young people are properly identified and met to help them to overcome any barriers to attainment.
- Improved motivation and self-confidence, attendance and engagement with education.
- Clearly defined objectives, including the next steps following the placement such as reintegration into mainstream education, or successful transition to further education, training or employment.

To ensure resources support children and young people to access education within the borough, the growing need for capacity of provision set against the demand requires a multi-faceted approach. Utilising early identification and support, graduated response as well as the development of in-borough provision with our maintained and academy partners must be a key part of this. Whilst much of the capacity for providing sufficiency of AP is providing short and medium term support, a more joined up longer term approach is crucial, including for cost avoidance.

To ensure this can be achieved, there will be a focus on:

- How the system can provide the highest quality support that enables children and young people who are vulnerable to thrive and prepare for adulthood, including employment.
- Supporting parents/carers to make decisions about what kind of support will be best for their child.
- Making sure support across the borough is consistent, joined up across health, care and education services, and that high-quality support is available.
- Striking the balance of local authority provision and inclusive mainstream provision.
- Aligning incentives for inclusion and accountability for schools, and the local authority to make sure the best possible support for children and young people is provided.
- Working collaboratively with school to understand what is driving demand for AP.
- Ensuring that public money is spent in an efficient, effective and sustainable manner.

5. Alternative provision sufficiency projects 2023-2027

An expression of interest went out in the Spring Term 2022 to all schools and settings, requesting they express an interest should they wish to provide resource or satellite provision, including for creating AP.

From this initial expression of interest, **17** primary schools, **2** secondary schools and **1** FE provider have requested to be considered for mainstream plus provision. During conversations with schools to progress projects, some are now being considered for AP, in conjunction with the PRU.

Discussions continue with education providers to support the LA in its aims of the send sufficiency plan and its drive to significantly reduce the impact on the high needs budget by ensuring children and young people can be supported by their own school, with access to high quality AP when required.

Projects requiring capital investment have and are being supported through the Special Provision Capital and the High Needs Provision Capital Allocation Grants.

The current sufficiency plan and model is based on developments in the short and medium term with alternative provision developments, but with the recent allocation of additional funding through the High Needs Capital Allocation Grant this could allow for additional capacity to meet the needs sooner.

Oldham have been awarded further funding for 2022-23 and 2023-24, from the DfE's high needs provision capital allocation grant. This creates a cumulative total of 6.0m (from the original 0.8m allocated in 2021-22).

High Needs Provision Capital Allocations 2021-24 (<i>published March 2022</i>)			
Updated HNPCA 2021-22	Updated HNPCA 2022-23	Additional HNPCA 2023-24	Total HNPCA 2021-24
£830,009	£2,189,364	£3,012,464	£6,031,837

Table 9: HNPCA 2021 - 2024

This funding is to support the development of additional capacity and enhancing school/setting environments to support children/young people with SEND and who require alternative provision. This is great news for Oldham as it will enable more sufficiency projects to proceed, thereby enhancing the specialist places available within the borough. This will be managed through the Education Provision Team, which reports into the Education Provision Group (EPG).

The potential capacity expansion programme based on the forecast data for children and young people who require alternative provision would look to provide the additional capacity we need.

6. Collaborative approach

The continuing development discussions with schools regarding additional capacity at mainstream school sites has the potential to align itself to a positive inclusive model. This supports the aims of providing local education places for children and young people with SEND in Oldham and may be more practical in effectively supporting the educational needs and demands of all children in Oldham long term, and successfully impacting, to the extent needed, to reduce the high needs block in the long term that will be sustainable.

Most children and young people should be able to access the support they need to thrive in their local mainstream setting, without the need for alternative provision. To ensure we can achieve this, we need to create a financially sustainable system that provides value and ensures the best outcomes for children and young people.

In Oldham we are committed to joining up the system so that a wider range of AP will be on offer, and this will be child and young person centred. Options being considered for development include part time or short term evidence based academic, vocational, therapeutic and personal development programs to support those within a mainstream setting who are at risk of permanent exclusion. The programme will be developed to provide a needs-fulfilment model; through which, high quality initial assessments will determine the right package for each child or young person. This will be done in collaboration with the PRU as a lead partner.

A clear referral process between mainstream schools and AP, and a rigorous entry and exit criteria will be developed, aligned with a revised fair access process. Consideration will also be given to other areas that can create vulnerabilities including in year moves (through normal admissions procedures) and formal managed moves.

Capacity within any newly commissioned AP will need to be flexible to accommodate differences in placement length and style; with some placements being full time, e.g. for in-year admission in Y11, part time, short term (sessional) and one-off.

In summary

The priorities we have identified as part of the overall SEND & Inclusion Strategy are intended to further reduce the need for AP through strengthening the range of provision within the borough and within schools. This will enable more of the high needs block to remain within the borough, and it will reduce the social costs to children, young people and families related to difficulties in accessing education.

To address sufficiency in the best way to meet the needs of children and young people in Oldham, we work in partnership with schools/settings and trusts to develop specialist provision within mainstream schools.

Our commitment is that children and young people have their needs identified promptly, with appropriate support and provision put in place within Oldham at the earliest opportunity and at the level they need it.

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Report to CABINET

Extension of Short Breaks Play and Leisure Activities from 1 April 2026

Portfolio Holder:

Cllr Mohon Ali, Cabinet Member for Education and Skills

Officer Contact: Julie Daniels, Executive Director Children and Young People

Report Author: Andrea Weir, Head of Service Children's Commissioning

Angela Welsh, Head of Women's and Children's Programmes (Oldham)

17 November 2025

Reason for Decision

This report seeks approval to exercise the option to extend the current contract with POINT. The service is a statutory requirement ensuring that children, young people, and families have access to Short Breaks Play and Leisure activities.

The existing contract (DN647420) is due to expire on 31 March 2026 but includes an existing option for a two-year extension. Approval is sought to exercise this option for two years to maintain compliance with statutory and funding obligations.

Recommendations

To exercise the option to extend the initial term of POINT Short Break Play and Leisure Activities Contract for a period of two years at £200,000.00 per year, from 1 April 2026 up until 31 March 2028 in order to allow services for Oldham's children, young people and families to continue. This will prevent any gaps in service delivery for children and young people with additional needs and their families and ensure statutory obligations are being met by the Council.

Extension of Short Breaks Play and Leisure Activities from 01 April 2026**1 Background**

- 1.1 In 2023, following a robust and transparent joint commissioning process, the Council entered into a contract with POINT to deliver Short Breaks Play and Leisure Activities (SBP&L). This service is a statutory requirement supporting children and young people with special educational needs and disabilities.
- 1.2 The SBPL offer must provide opportunities enabling children and young people to access development and leisure activities suitable to meet their needs. The broad aims of SBPL are to provide respite for families preventing breakdown and escalation to higher cost intensive services; a safe place for children and young people to develop independence skills, build self-esteem and self-confidence and engage and interact with their peers and an alternative to more costly one to one Personal Advisor support where appropriate to meet individual needs.
- 1.3 Initial approval included a contract term of three years with the option to extend for a further two years. This extension is within the scope of the original award. The contract has delivered excellent outcomes to date and is recognised for its strong performance and positive impact.
- 1.4 Oldham remains committed to delivering inclusive services with high aspirations for all children and young people, including those with additional needs.

2 Current Position

- 2.1 The SBP&L Service, also a statutory requirement, is currently delivered by POINT under a separate contract due to end 31 March 2026. POINT continues to meet or exceed performance targets for both services and is well regarded across the borough by professionals, families, and young people.
- 2.2 The SBP&L contract has consistently delivered against its key principles of fairness, accessibility, and efficiency. Feedback from service users remains positive, with up to 90 percent of respondents rating the service favourably. In 2023, the SBP&L Service was originally contracted with a funding allocation of £200,000.00 per year, jointly funded with the GM Integrated Care Partnership (ICP). The funding is split equally between the Council and the ICP. The ICP are currently taking the paper through their internal governance seeking approval for the extension.
- 2.2 The proposed extension will maintain momentum, avoid service disruption, and continue to support the development of confidence, independence, and peer relationships for children and young people with SEND, while also providing crucial respite for families.

3 Options/Alternatives**3.1 Option One – Recommended:**

To exercise the option to extend the initial term of POINT Short Break Play and Leisure Activities Contract for a period of two years at £200,000.00 per year, from 1 April 2026 up until 31 March 2028 in order to allow services for Oldham's children, young people and families to continue. This will prevent any gaps in service delivery for children and young people with additional needs and their families and ensure statutory obligations are being met by the Council.

3.2 **Option two**

Do not exercise the option to extend and allow the Short Break Play and Leisure Contract with POINT to cease on 31 March 2026. This is not recommended as this would reduce services available for families and mean that statutory obligations are not being met.

4 **Preferred Option**

4.1 **Option One – Recommended:**

To exercise the option to extend the initial term of POINT Short Break Play and Leisure Activities Contract for a period of two years at £200,000.00 per year, from 1 April 2026 up until 31 March 2028 in order to allow services for Oldham's children, young people and families to continue. This will prevent any gaps in service delivery for children and young people with additional needs and their families and ensure statutory obligations are being met by the Council.

5 **Consultation**

5.1 Consultation with children, young people and families was conducted during the process of the original tender through Parent Carer Forum. In addition to this and as part of ongoing service development, regular Steering Group sessions take place with the whole partnership including Children, young people and families.

6 **Financial Implications**

6.1 The report is requesting to extend the initial term of POINT Short Break Play and Leisure contract for a further two years, from 1 April 2026 to 31 March 2028 at £200k per annum. The POINT contract is funded in the 2025-26 budget as follows:
£100k – Dedicated schools grant – high needs block
£100k - GM Integrated Care Partnership (ICP) contribution

It should be noted; the contract extension will require funding confirmation from the ICP for a further 2 years. If this is not obtained there will be a budgetary pressure to the Council of £100k per annum in 2026/27 & 2027/28 which will have to be met from either a reduced service offer or an alternative funding source identified from within the Children's Services budget. (Nicola Harrop – Finance Manager) – 24.09.2025

7 **Legal Implications**

7.1 This contract extension is in line with both legal and procurement process. Legal have nothing further to add.
Mike Grocott Solicitor – 24.09.2025

8 **Procurement Implications**

8.1 The contract was originally tendered through an open process in early 2023, and awarded to POINT following evaluation and moderation. The contract initial term was stated as 1/4/23 to 31/3/26. The contract was advertised as a 3+2 contract, and the contract allows for an extension of up to 2 years, upon written agreement from the provider. An extension must be exercised prior to the expiry of the contract or there is nothing there to extend. The contract manager must be satisfied that the contract has been delivered to the expected standards and at the agreed price.
James England – Procurement Manager – 24.09.2025

9 **Equality Impact, including implications for Children and Young People**

9.1 Not applicable as the service is continuing

10 **Key Decision**

10.1 Yes

11 **Key Decision Reference**

11.1 EDS-12-25

12 **Background Papers**



12.1 Short Breaks Play and
Leisure - Approval to

13 **Appendices**

13.1 None



Report to CABINET

Change Partnership Programme delivery – Early Language Support for every child/Alternative Provision Specialist Taskforce: grant requirements

Portfolio Holder: Councillor Mohon Ali - Cabinet Member for Education and Skills

Officer Contact: Julie Daniels – Executive Director Children and Young People

Report Author: Paula Green, Head of SEND and Inclusion

17th November 2025

Reason for Decision

This paper seeks approval to appoint/extend posts relating to grant funding allocated to Oldham in relation to the Change Partnership Programme (CPP) and associated ELSEC (Early Language Support for every child) and the APST (Alternative Provision Specialist Taskforce). The funding is ringfenced and can only be used for the purpose set out in this report.

Recommendations

Recommendations are requested for the progression of the CPP proposed model, which sees a significant investment in Oldham's SEND Team, Specialist Services and statutory responsibilities which, in turn, will provide better support and opportunities for building a sustainable system for children and young people with SEND. Therefore, approval is sought to implement **option one** below only, to draw on the CPP grant funding to enable creation of the required posts and dependencies to work alongside the SEND Team and wider SEND & Inclusion Service.

CPP delivery grant requirements

1 Background

- 1.1 Since the reforms to the special educational needs and/or disabilities (SEND) system, set out in the Children and Families Act 2014 in 2014, there has been a consistent rise in demand for education, health and care plans (EHCPs) and associated support and provision, including that across education, health and care.

Placing children and young people at the centre of the SEND system was right, as were many other aspects of the reforms, but the reforms set out in the Act were not supported by sufficient powers or funding to allow councils to meet the needs of children with SEND. This has meant that the reforms have failed to achieve the goal of improving provision (early intervention and prevention) for children and young people with SEND as a result.

As a result of the reforms, there has been growing numbers of education, health and care plans (EHCPs) supporting young people with special educational needs and disability (SEND), rising rates of exclusions and placements in alternative provision (AP), and rising pressure on resources for young people with additional and high needs. Therefore, the government are planning to further reform the system, as set out in the Special Educational Needs and Disabilities (SEND) and Alternative Provision (AP) Improvement Plan Right Support, Right Place, Right Time, March 2023.¹

Oldham were successful in a bid to be part of the North West Change Partnership Programme, explicitly to focus on testing proposed reforms with the aim of creating greater sustainability within the system. This was initially for a period of two years and has now been extended for a final third year with further funding until the end of 2025/2026. This bid has been analysed and considered by the DfE and the areas of activity, including several posts to support the year 3 delivery programme.

2 Current Position

- 2.1 The proposal under the CPP will contribute to the creation of effective processes and routines related to SEND, early intervention/prevention and alternative provision, at a national level.

Given the multi-faceted nature of local SEND systems, consistent practice in identifying needs, putting in place support, carrying out annual reviews and planning for young people's transition is crucial.

This is how we young people with SEND will be enabled to make the most of their education and childhood and pursue their aspirations as they move into adulthood.

This is not about having the same approach for everyone, but rather, established mechanisms that enable professionals to be pro-active to create person centred plans when working with young people with SEND and their families.

There needs to be a joined-up, coherent approach to preparing young people for adulthood from their earliest years and the potential reforms, will go some way towards that.

¹

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1139561/SEND_and_alternative_provision_improvement_plan.pdf

This paper relates to posts and dependencies and seeks approval to implement these on a fixed term basis for a period of one year, to be fully funded by the CPP grant which has been agreed.

These posts focus particularly around increasing the current SEND Team and Specialist Services and associated activities related to the council's statutory responsibilities. The full list of posts is outlined in the appendix with associated financial information. All costs will be covered by the CPP grant.

The proposal outlines the creation of several fixed terms posts which will be fully funded by the CPP grant and which will allow the objectives set out in our bid to the DfE to be realised.

It will achieve this through increased capacity for a fixed term period to test the reforms that all local authorities will have to implement.

These posts have already been agreed as part of the bid process and outcomes measures will be in place to ensure an understanding of their impact over the fixed term period.

3 Options/Alternatives

3.1 **Option 1:** Approve progression of the staffing model outlined in appendix A so that the CPP can be implemented in full.

The CPP funding is ring-fenced for the projects identified in this paper. Therefore, there is no other viable option. Carrying out the projects will provide the local area with much needed early identification and specialist support for our most vulnerable children and young people.

Option 2: Do nothing.

If we take no action, funding will not be utilised and may, as a result, need to be returned to the DfE, which would significantly limit the support available to identify needs and support our most disadvantaged children and young people.

4 Preferred Option

4.1 The recommended option is option one. This allows for progression of the CPP proposed model, which sees a significant investment in Oldham's SEND Team, Specialist Services and statutory responsibilities which, in turn, will provide better support and opportunities for building a sustainable system for children and young people with SEND.

Therefore, approval is sought to implement **option one** above, to draw on the CPP grant funding to enable creation of the required posts and dependencies to work alongside the SEND Team and wider SEND & Inclusion Service.

5 Consultation

5.1 Oldham Parent/Carer Forum, parents/carers and partners have been involved in the development of the grant bid throughout the duration of the project.

6 Financial Implications

6.1 **Staffing Model Approval Request – NW CPP Funding**

This report seeks approval to implement the staffing model outlined in Appendix A, which includes the appointment and extension of posts funded by the Northwest Change Partnership Programme (NW CPP) grant allocated to Oldham.

Posts Within Scope (Funded by NW CPP)

Job Title	Period	Cost (£)
Quality Assurance Lead	12 months	78,330
SEND Support Officer *	12 months	38,020
SEND Team Manager	Honorarium	5,000
Advisory Teacher	TLR	3,500
SEND Improvement Officer	12 months	47,930
Advisory Teacher	9 months	58,748
Advisory Teacher	9 months	58,748
SEMH Advisory Teacher	6 months	39,165
SEMH Advisory Teacher	6 months	39,165
Advisory Teacher	6 months	39,165
Assistant Educational Psychologist *	12 months	51,210
LISO Coordinator LA *	12 months	46,690
POINT Commission	12 months	60,000
Total		£565,670

* Denotes **New** posts

Confirmed Grant Funding

Grant Source	FY2025/26 (£)
NW CPP	562,229
ELSEC	251,653
ELSEC (NHSE)	133,000
Alternative Provision Specialist Taskforce (APST)	229,758
Total Grant Funding	£1,176,640

Key Points for Approval

- The total cost of the proposed staffing model is in the region of **£565,670** including oncosts, which will be covered by the **NW CPP** grant allocation.
- Additional funding from **ELSEC**, **ELSEC (NHSE)**, and **APST** provides further financial flexibility and support for related initiatives.
- The roles outlined are critical to delivering the objectives of the NW CPP and improving SEND services in Oldham.

Vicki Hayes – Senior Accountant

7 Legal Implications

- 7.1 Assuming all proper procurement process has been followed legal have nothing further to add – Mike Grocott

8. Procurement Implications

- 8.1 There are no Procurement implications however the Council policies and procedures should be followed when employment decisions are made to avert any unlawful claims. It is important the consultation has been taken with all the parties in the council concerned. It is also recommended that should the service foresee these roles being required in the longer term then the service structure is carried out with a view to establishing the post accordingly.

9 Equality Impact, including implications for Children and Young People

- 9.1 No [delete as appropriate] Ctrl and click to follow link to complete <https://app.powerbi.com/home?experience=power-bi>

10 Key Decision

- 10.1 Yes

11 Key Decision Reference

11.1 EDS-11-25

12 Background Papers

12.1 N/A

13 Appendices

13.1

Appendix I: Details of proposed use of grant for the Change Partnership Programme

A: Change Partnership Programme posts						
Post	Grade	FTE	Period	Location	Further details (linked to project bid)	Cost
SEND Support Officer	3	1	1 year	SEND Team	<ul style="list-style-type: none"> All aspects of support for the below 	36,290
QA Lead	STPC: UPS	1	1 year	Advisory Teaching Service	<ul style="list-style-type: none"> Quality assurance of ARP, Special Schools, Tier 2, APST QA of ordinarily available provision/GR/Notional SEND budget 	78,760
SEND Team Manager	SM3	1	1 year	SEND Team	Honorarium, Lead of APST and Tier 2	5000
Senior Advisory Teacher	UPS3 + TLR2	1	1 year	SEND - ACNS	Honorarium, Lead LISO team, increased TLR 2 payments	3500
SEND Improvement Lead	STPC: UPS	1	1 FTE	SEND - ACNS	Currently 0.5 FTE, can increase to 1 FTE. 0.5 FTE increase	40,120
2 x Early Years for 2 terms	UPS3 +TLR2	2	2 terms	SEND - ACNS	PINS and LISO; 2 x Early Years - £118,139.40 2 x SEMH - £78,759.60 1 x ASC – £39,379.80 2 x assistant EP - £45,530	281,808.80
2 x SEMH for 1 term	UPS3 +TLR2	2	1 term			
1 x Advisory Teacher ASC 1 term	UPS3 +TLR2	1	1 term			
1 x Assistant EP	S'bury AEP scale 2-4	1	1 year			
POINT	N/A	N/A	1 year	POINT	Coordination and implementation support (general, LISO, PINS). Co-ordinate parent voice, engagement, and impact.	60,000
LISO Coordinator LA	G5	1	1 year	SEND - ACNS	1 x FTE coordinator	41,240
ELSEC	N/A	N/A	1 year	SEND - ACNS	ELSEC/Salt Navigator post within POINT including creation of padlets and blogs to support parents - £50,000 Short Breaks award to gather pupil voice in 10 existing ELSC schools - £10,000 Specialist workforce extension - Extension of the Advisory Teacher post through an amended secondment agreement with the Harmony Trust – £42,502 Specialist workforce - Extension to current SLA with Harmony Trust for specialist posts (SaLT and/or SaLT assistants subject to availability) up to the value of £130,000 Providing universal access to key tools and licenses for all schools in Oldham, including recommissioning of Language Link for all secondaries - £150,000	382,502
APST	TBC	5	1 year	SEND - Kingsland	This is a separate grant and will increase existing capacity of the APST	229,758
Total exc. ELSEC and APST						£546,718.80

DELETE THE SIGNATURE BOX IF THE REPORT IS A CABINET DECISION

Signed _____ Cabinet Member (specify whom)	Dated _____
Signed _____ Executive Director/Deputy Chief Executive	Dated _____

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Report to CABINET

Request for a Direct Award of the Domestic Property Disability Adaptions Framework for the Provision of Level Access Showers and Shower over Baths

Portfolio Holder: Cllr Barbara Brownridge, Lead Member for Health and Social Care

Officer Contact: Jayne Ratcliffe, Director of Adults Social Services

Report Author: Ayshia Akhtar, Commissioning Manager, ASC Commissioning and Market Management

Email: Ayshia.akhtar@oldham.gov.uk

17th November 2025

Reason for Decision

The Domestic Property Disability Adaptations (DPDA) Framework, which provides essential works such as Level Access Showers and Shower over Baths through the Disabled Facilities Grant (DFG), has exceeded its approved contract value and cannot be extended within the limits set by the Council's Contract Procedure Rules. It is therefore proposed to end the framework following its current one-year extension, seek an exemption to regularise spend via a direct award, and secure continuity of service beyond November 2025.

Executive Summary

The Council has a multi contractor Framework Agreement in place for Domestic Property Disability Adaptations (DPDA), which commenced on 1 December 2022 for an initial term of 2 years with the option to extend twice, each for an additional term of no more than 1 year. Under the Framework Agreement, the Council places orders for the provision of Level Access Showers and Shower over Baths, as and when required. The Framework Agreements were put in place to enable the Council to meet its duty to award a Disabled Facility Grant (DFG) to those who are eligible and to ensure

the works funded by a DFG are completed to a high standard and in a timely manner.

The initial 2 year term of the Framework Agreement, which the Council has entered into with each of the 4 appointed contractors, expired on 30th November 2024. An extension was granted for 1 year and is due to expire on 30th November 2025, as outline in Appendix A. The Framework Agreement provides that 28 days' written notice is required to be served on the Contractor in order to extend the initial term.

It is proposed that the second available extension period is not utilised, as the contract spend has already exceeded the permitted threshold. Instead, it is intended that a direct award if approved for 12 months to ensure continuity of service beyond 30th November 2025.

The cost of the extended term is not within the capped total life of contract costs set at £2,260,000, as approved in the original Cabinet report for the procurement of DPDA works requirements and as provided for in the advertised opportunity. The spend to date is £3,089,518.45, which exceeds both the original approval and the maximum permitted modification under the Council's Contract Procedure Rules (CPRs).

Under the CPRs, a modification of up to 15% (in this case, £339,000) would have been permissible, resulting in a total of £2,599,000. As the actual spend has already exceeded this figure, an exemption to the CPRs is required. This report therefore seeks approval to end the Framework Agreements and to formally request an exemption for a direct award in order to regularise the position and enable continued delivery of this essential service.

The DFG budget for this year is £3,044,703.82. The spend to date from the DFG budget is £1,034,003.19 which leaves an outstanding budget of £2,010,700.63. Projected spend to the end of the framework will also need to be calculated to ensure it remains within the wider thresholds.

The new arrangement will allow continuity of essential provision providing Officers time to continue monitoring the success of the current framework and consider procurement options for future contractual arrangements. Consideration will be given and built into the procurement pipeline in terms of future contracting, including consideration of joint approaches with neighboring authorities.

The report also seeks approval to increase the framework prices by 5% from April 2025 to November 2025. And to ensure the uplift in the direct award for December 2025 to November 2026.

Recommendations

Option 4 is the preferred option;

To end the current Framework Agreements on 30th November 2025 and request an exemption from the CPRs in order to approve a direct award to the current four providers under a one-year Framework Agreement, running from 1st December 2025 to 30th November 2026.

In addition, to approve a 5% uplift to the current contract rates backdated from 1st April 2025 to November 2025 and for the extended 12 months contract value

Under this option, the current agreements would end on 30th November 2025. We would seek an exemption to the CPRs, as the spend to date plus the projected spend to 30th November 2025 will exceed the permitted modification threshold.

The proposal is to make a direct award to the current four framework providers on a one-year term (to 30th November 2026) to ensure continuity of service, in line with the original arrangement. This approach would provide sufficient time to undertake a new procurement exercise

In addition, a 5% uplift to contract prices would be applied from April 2025, reflecting rising costs. This would support providers to remain financially sustainable, encourage their continued engagement, and help secure their participation in both the current and future procurement exercises.

Request for a Direct Award of the Domestic Property Disability Adaptions Framework for the Provision of Level Access Showers and Shower over Baths

1 Background

- 1.1 The Domestic Property Disability Adaptions Framework Agreement allows the Council to place orders for the provision of level access showers and shower over baths, as and when required and at a competitive price. This, in turn, assists the Council in meeting its statutory obligations linked to the assessment and award of DFGs.
- 1.2 The Framework Agreements make provision for orders to be offered to the appointed contractors using a rotation system; contractors have the opportunity to accept or decline orders based upon their capacity at the time.
- 1.3 The Framework Agreements commenced on 1st December 2022 and the expiry date of the initial term was 30th November 2024. The Framework Agreements include an option for the Council to extend the initial term for 2 further periods of 12 months (2+1+1) subject to the Council serving no less than 28 days' written notice.
- 1.4 The capped total life of the contract costs is set at £2,260,000.
- 1.5 There are 4 contractors appointed to the framework arrangement:
 - Moffat and Riley Heating Services
 - Wright Build Ltd.
 - Structec Building And Maintenance Contractors
 - UPS Building And Maintenance
- 1.6 Our vision for Adult Social Care in Oldham is to support individuals to live independently, healthy, safe and well. The service allows for that to happen and works to our target operating model in terms of prevention of moving into a residential setting.

2 Current Position

- 2.1 The Domestic Property Disabled Adaptions Framework primarily provides adaptations to homes, such as level-access showers and shower-over-bath facilities, for eligible residents of the borough. This service is crucial in enhancing the quality of life, health, and wellbeing of service users by supporting personal care and hygiene, while also reducing or managing environmental risks within their homes.
- 2.2 The framework comprises four contracted providers. Following the contract extension in November 2024, several providers have contacted the commissioning team requesting an increase in contract rates due to rising living costs and other material expenses, which are impacting the effective delivery of the bathing services.
- 2.3 The proposal is to extend the contract for 12 months with a 5% uplift applied, and to apply the 5% to the current contract prices, backdated to April 2025. This increase is intended to support providers in continuing to deliver efficient and effective equipment and adaptation services across the borough.

- 2.4 There is no defined contractual provision to increase the prices during the midterm of contract, However, the contract refers to the discretionary annual review which has not been exercised yet. The costs of equipment in the industry have increased and various authorities across GM, including Tameside with whom we have several shared Equipment and Adaption contracts with, have offered an increase of 5% during the of contract for their bathing contract. This increase would help the providers to tackle the rising costs of National Insurance contributions, living costs and general rises in material costs. It may also help service providers to retain an interest in the future tendering exercise for the adaptation services which is to be conducted in late period of 2026. It is to be noted that there have been no considerations to increases prices in previous years in line with the annual discretionary review.
- 2.5 Following this contract extension, the commissioning plan is to undertake a new tendering exercise to ensure the continued and effective delivery of bathing services for residents of the borough. It is anticipated that this procurement will take place during the summer of 2026, with providers appointed to the framework and ready to commence service delivery from 1 December 2026.
- 2.6 Table 1 and Table 2 and Table 3 shows the number of completed Level Access Showers (LAS) and Shower Over Baths (SOB) from 2023 – 2024, 2024 – 2025 and 2025 to date along with the total costings.

2023 – 2024				
Contractors	Level Access shower	Shower Over Bath	Bathrm Alts	Costs
Moffat & Riley	52	2	1	£322,654.94
Structec	37	6	12	£315,870.77
UPS	34	8	0	£232,086.21
Wright Build	49	5	3	£351,793.85
Total	172	21	16	£1,222,405.77

Table 1

2024 - 2025				
Contractors	Level Access shower	Shower Over Bath	Bathrm Alts	Costs
Moffat & Riley	34	2	1	£219,755.84
Structec	12	2	2	£105,505.85
UPS	33	4	1	£214,780.60
Wright Build	29	5	1	£201,999.26
Total	108	13	5	£742,041.55

Table 2

2025 to date				
Contractors	Level Access shower	Shower Over Bath	Bathrm Alts	Costs
Moffat & Riley	51	3	1	£309,329.46
Structec	38	2	2	£305,924.75
UPS	35	0	1	£214,780.60
Wright Build	48	5	3	£295,036.32
Total	172	10	7	£1,125,071.13

Table 3

- 2.7 Figures were low in 2024 and 2025 because work was delayed in an effort to manage the budget, as the service was experiencing significant overspending.
- 2.8 Based on historical contract costs and 2025 to-date figures, we estimate total spend for the second extension period (December 2025 – November 2026) to be approximately £1.65 million. This estimate assumes similar levels of activity and contract pricing as observed in the current year.
- 2.9 The table below shows the total projected spend, representing the estimated full-life cost of the contract. This includes actual expenditure to date, anticipated spend for the remainder of 2025, and projected expenditure for the 2025/26 financial year.

Description	Amount (£)
Spend to date	3,089,518.45
Projected spend (Sept–Nov 2025)	375,023.71
Projected spend (2025/26)	1,650,000
Total projected contract spend	5,114,000

Table 4

- 2.10 In line with PA23 regulations the threshold for Works contracts is £4,477,174 excl VAT. If the total spend during the lifetime of the framework is likely to exceed this figure the council will be governed by the PA23 procurement regulations under which a modification up to 15% for Works is permitted.
- 2.11 Following emails from all the contracted service providers from March 2025, the Commissioning team have undertaken benchmarking exercises with the other GM authorities to understand the changes all across the area. Tameside and Rochdale have aligned with their adult social care annual uplifts.
- 2.12 It is proposed that, in line with the inflationary pressures and cost of living crisis, a 5% uplift should be considered. Although the current contractual Terms and Conditions does support discretionary price reviews, we need to understand the implications of this request to the service and to the overall budget.
- 2.13 To understand the impact, following data sets are being displayed to showcase amount of adaptations delivered and the potential cost increases.

Current unit costs vs. projected costs with the 5% increase		
1	Current base price for Level Access Shower = £5,000.00	Base price with 5% increase = £5,250.00
2	Current base price for Shower Over Bath = £1,716.00	Base price with 5% increase = £1,801.80

Table 5: Cost Analysis

- 2.14 The table below summarises the financial position for Disabled Facilities Grant (DFG) provision as of April 2025, including total budget, spend to date, remaining budget, and the impact of a proposed 5% uplift to base prices.

Description	Amount (£)
Total Budget for DFG Provision	3,044,703.82
Spend to Date	1,034,003.19
Remaining Budget	2,010,700.63
Projected additional cost from 5% uplift	56,253.56

3 Options/Alternatives

3.1 Option 1: Do nothing and allow the Framework Agreements to come to an end on 30 November 2025.

This option would involve taking no further action, allowing the current Framework Agreements to expire without extension or retendering. This would result in the cessation of the existing contractual arrangements for the provision of level access showers and shower-over-bath adaptations after 30th November 2025.

This approach would leave the Council without a formal mechanism to deliver essential adaptation works, which are a key component in fulfilling its statutory duties under the Disabled Facilities Grant legislation. It would significantly hinder the Council's ability to process and deliver adaptations in a timely and consistent manner, potentially breaching statutory timeframes and leaving vulnerable residents without necessary support.

Additionally, operating without an agreed framework would increase the risk of non-compliance with procurement regulations and create uncertainty for both service users and contractors, as well as remove oversight of the providers delivering these services.

This option is not recommended due to the legal, operational, and reputational risks it presents to the Council.

3.2 Option 2: To extend each Framework Agreement for 12 months, subject to contractor

agreement, and seek an exemption to the CPRs.

This option would extend the Framework Agreements in accordance with clause 2.2 of the applicable terms and conditions, before the end of the first extension term (30th November 2025), for a period of 12 months, provided the appointed contractors agree within the 28 days' written notice.

As the spend to date (£3,089,518.45) already exceeds the original approval (£2,260,000) plus the maximum permitted modification under the CPRs (£339,000), an exemption is required in order to regularise the contract position.

This option takes us above the works threshold and therefore a modification of the proposed values is not permitted.

This option also does not address the issue of inflationary pressures or provider sustainability, as no uplift would be applied.

This option is not recommended due to the legal, operational, and reputational risks it presents to the Council.

3.3 Option 3: To extend each Framework Agreement for 7 months, seek an exemption to the CPRs, and approve a 5% uplift from April 2025.

This option would extend the Framework Agreements as per clause 2.2, subject to contractor agreement within the 28 days' written notice. It would also seek an exemption to the CPRs given that spend to date has exceeded the permitted modification limit.

Additionally, it would apply a 5% uplift to contract prices from April 2025 in recognition of rising costs, supporting providers to remain financially sustainable and engaged in future procurement exercises.

If approved, the Framework Agreements would expire on 30th June 2026, with the Commissioning Team planning a new tender exercise in 2026.

This option is not recommended due to the legal, operational, and reputational risks it presents to the Council.

3.4 Option 4: To end the current Framework Agreements on 30th November 2025 and request an exemption from the CPRs in order to approve a direct award to the current four providers under a one-year Framework Agreement, running from December 2025 to November 2026.

In addition, to approve a 5% uplift to the current contract rates from April 2025 to November 2025 and for the extended period until November 26

Under this option, the current agreements would end on 30th November 2025. We would seek an exemption to the CPRs, as the spend to date plus the projected spend to 30th November 2025 will exceed the permitted modification threshold.

The proposal is to make a direct award to the current four framework providers on a one-year term (to 30th November 2026) to ensure continuity of service, in line with the original arrangement. This approach would provide sufficient time to undertake a new procurement.

In addition, a 5% uplift to contract prices would be applied from April 2025, reflecting rising costs. This would support providers to remain financially sustainable, encourage their

continued engagement, and help secure their participation in both the current and future procurement exercises.

4 Preferred Option

- 4.1 Option 4 – To end the current Framework Agreements on 30th November 2025 and request an exemption from the CPRs in order to approve a direct award to the current four providers under a one-year Framework Agreement, running from December 2025 to November 2026. In addition, to approve a 5% uplift to the current contract rates from April 2025 to November 2025.**

Under this option, the current agreements would end on 30th November 2025. We would seek an exemption to the CPRs, as the spend to date plus the projected spend to 30th November 2025 will exceed the permitted modification threshold.

The proposal is to make a direct award to the current four framework providers on a one-year term (to 30th November 2026) to ensure continuity of service, in line with the original arrangement. This approach would provide sufficient time to undertake a new procurement.

In addition, a 5% uplift to contract prices would be applied from April 2025, reflecting rising costs. This would support providers to remain financially sustainable, encourage their continued engagement, and help secure their participation in both the current and future procurement exercises.

5 Consultation

- 5.1 Consultation will be taking place with the four contracted providers.

6 Financial Implications

- 6.1 The one-year Framework Agreement will continue to be financed by the Disabled Facilities Grant (DFG) capital budget.

Contracts from the framework will need to be let within the remaining DFG budget.

Jit Kara – Senior Accountant

7 Legal Implications

- 7.1 While the spend is significant all proper procurement process has been followed, and the contract is a standard approved framework that is sufficient to mitigate the risk presented by the project's specification. Option 3 and 4 are supported by legal to ensure continuity of service and ensure our contractual situation and risk is assured.

Mike Grocott - Solicitor

8. Procurement Implications

- 8.1 The initial term of the framework agreement commenced on 1st December 2022 and expired on 30th November 2024. The framework agreement had the option to extend by two (2) periods of twelve (12) months beyond the initial term. A Delegated decision report

was approved in November 2024 to utilise the first permitted extension taking the expiry of the framework agreements to 30th November 2025.

This is a below threshold works contract which was not awarded under PCR2015 and is therefore subject to the councils CPRs

As detailed in this report spend to date is £3,089,518.45 with projected spend of £375,023.71 for Sept–Nov 2025 and projected spend of £1.65m for 2025/26. This would give an estimated total spend of £5,114,000 for the 4-year term which would be above the Works threshold of £4,477,174 excluding VAT.

Rule 17.1 of the CPRs states that subject to Rule 17.2 a Modification of a Contract which is not subject to the Procurement Regulations may be permitted if the following limited criteria apply:

- (c) (i) the need for modification has been brought about by circumstances which a diligent contracting authority could not have foreseen; and
- ii) the modification does not alter the overall nature of the contract.

Rule 17.2 states that a Contract during its term shall be considered substantial for the purposes of Rule 17.1 where the Modification increases the contract value for Works by more than 15%.

This is therefore a substantial modification and requires an exemption in line with Rule 21 of the CPRs.

It is recommended that the current framework agreements end on 30th November 2025 and that the second extension is not utilised. This will bring the agreements to and end with a total spend of £3,464,542.16

The service must seek a further exemption to the CPRs to approve direct awards to the current 4 providers on a 12-month term. The projected spend for this 12-month term is £1.65m. Continued provision of Works is required for an additional period, and this can be justified as the new procurement will commence immediately for services from 1st December 2026. Furthermore the framework agreements will end on 30th November 2026 as per the previous award.

An exemption request can only be authorised by the Deputy Chief Executive, the Assistant Chief Executive, or a Director who does not have direct line management responsibility for the service.

Ankur Patel - Interim Category Manager

9 Equality Impact, including implications for Children and Young People

9.1 Yes

10 Key Decision

10.1 Yes

11 Key Decision Reference

11.1 HSC-15-25

12 Background Papers

12.1 None

13 **Appendices**

13.1 Appendix A - DDR Report DPDA Framework Bathing Final

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Delegated Decision Report

Decision below £250k



Subject:	Contract Extension of the Domestic Property Disability Adaptations Framework for the Provision of Level Access Showers and Shower over Baths
Decision maker: Senior Officer	Jayne Ratcliffe, Director of Adult Social Care
Decision maker: Cabinet Member	Councillor Barbara Brownridge – Cabinet Member for Health and Social Care
Decision date:	26 th November 2024
Report author:	Ayshia Akhtar – Commissioning Manager Older Age Adults
Ward (s):	All

Reason for decision

The Council has a multi contractor Framework Agreement in place for Domestic Property Disability Adaptations, which commenced on 1 December 2022 for an initial term of 2 years with the option to extend twice, each for an additional term of no more than 1 year. Under the Framework Agreement, the Council places orders for the provision of Level Access Showers and Shower over Baths, as and when required. The Framework Agreements were put in place to enable the Council to meet its duty to award a Disabled Facility Grant (DFG) to those who are eligible and to ensure the works funded by a DFG are completed to a high standard and in a timely manner.

The initial 2 year term of the Framework Agreement, which the Council has entered into with each of the 4 appointed contractors, will expire on 30 November 2024. The Framework Agreement provides that 28 days' written notice is required to be served on the Contractor in order to extend the initial term.

It is proposed that, subject to approval and to the appointed contractors agreeing to accept less than 28 days' written notice, the first available extension period is utilised and the term is extended to 30 November 2025. The cost of the extended term is within the capped total life of contract costs set at £2,260,000, as approved in the original Cabinet report for the procurement of Domestic Property Disability Adaptation Works requirements and as provided for in the advertised opportunity.

This paper seeks approval to extend each Framework Agreement, in accordance with clause 2.2 of the applicable terms and conditions, before the end of the initial term (30th November 2024) for a period of 12 months provided the appointed contractors agree to accept less than 28 days' written notice.

It should be noted that the spend to date **against the contract** from the DFG budget is £1,803,758.88 which leaves an outstanding **contract provision** of £456,241.12. This paper will be followed up with a Cabinet report seeking approval to increase the original budget to meet any additional funding that is required due to the under allocated funding approved in the original report. Approval will also be sought to amend each Framework Agreement, in accordance with the Contract Procedure Rules, to allow for the procurement of additional works. This will be subject to advice from the Commercial Procurement Unit and Legal Services.

For the upcoming contract year, it is essential that the permitted extension is approved and that extension letters are issued to the 4 appointed contractors and returned signed before 30th November 2024 to prevent the agreements from expiring.

The extension will allow continuity of essential provision providing Officers time to continue monitoring the success of this framework and consider procurement options for future contractual arrangements. Consideration will be given and built into the procurement pipeline in terms of future contracting, including consideration of joint approaches with neighbouring authorities.

Recommendation(s)

Option 1: To extend the Domestic Property Disability Adaptations Framework Agreements in place by utilising the first available 1-year extension period provided for in clause 2.2 of the applicable terms and conditions and the main body of each Framework Agreement.

Background

The Domestic Property Disability Adaptations Framework Agreement allows the Council to place orders for the provision of level access showers and shower over baths, as and when required and at a competitive price. This, in turn, assists the Council in meeting its statutory obligations linked to the assessment and award of DFGs.

The Framework Agreements make provision for orders to be offered to the appointed contractors using a rotation system; contractors have the opportunity to accept or decline orders based upon their capacity at the time.

The Framework Agreements commenced on 1st December 2022 and the expiry date of the initial term is 30th November 2024. The Framework Agreements include an option for the Council to extend the initial term for 2 further periods of 12 months (2+1+1) subject to the Council serving no less than 28 days' written notice. Therefore, any extension of the term would need to be subject to the contractors accepting less than 28 days' written notice.

There are 4 contractors appointed to the framework arrangement:

- Moffat and Riley Heating Services
- Wright Build Ltd.
- Structec Building And Maintenance Contractors
- UPS Building And Maintenance

Table 1 and Table 2 shows the number of completed Level Access Showers (LAS) and Shower Over Baths (SOB) from 2024 to date and 2023 – 2024 along with the total costings.

Completed Level Access Showers & Shower Over Baths

2024 - To date				
Contractors	LAS	SOB	Bathrm Alts	Costs
Moffat & Riley	28	2	1	£ 180,856.96
Structec	10	1	2	£ 85,404.54
UPS	27	3	0	£ 170,515.73
Wright Build	20	3	1	£ 144,575.88
Total	85	9	4	£ 581,353.11

Table 1

2023 - 2024				
Contractors	LAS	SOB	Bathrm Alts	Costs
Moffat & Riley	52	2	1	£ 322,654.94
Structec	37	6	12	£ 315,870.77
UPS	34	8	0	£ 232,086.21
Wright Build	49	5	3	£ 351,793.85
Total	172	21	16	£ 1,222,405.77

Table 2

Our vision for Adult Social Care in Oldham is to support individuals to live independently, healthy, safe and well. The service allows for that to happen and works to our target operating model in terms of prevention of moving into a residential setting.

Option(s) to be considered *(please give the reason(s) for recommendation(s))*

Option 1: To extend the term of each Domestic Property Disability Adaptations Framework Agreement by 1 year, as permitted by the terms and conditions of each Framework Agreement, to allow the continued provision of level access showers and shower over baths. This option would be subject to the contractors agreeing to accept less than 28 days' written notice from the Council and to the spend being limited to the remaining value of the advertised contract value.

This will allow the continued provision of level access showers and shower over baths. The quality of the workmanship from the existing four contractors on the framework has been satisfactory and a good working relationship has been developed between the Equipment and Adaptations Team and the contractors.

There is insufficient time to re-tender the opportunity prior to the expiry of the initial term but, in any event, to do so at this stage would be very disruptive to the continuity of work. It is particularly important to have continuity of this work to enable the Council to meet its statutory duty to assess and award DFG applications in line with legal timeframes. The Framework Agreements, which the Council has put in place, allow for the works required to meet each applicant's relevant needs are carried out and completed to a high standard and in a timely manner.

If approved, the Framework Agreements would expire on 30th November 2025, unless further extended by an additional year.

This is the preferred option, as this enables continuity of service provision and compliance with the Council's statutory duty to provide a DFG to those who qualify.

Call-off arrangements would continue up to the original advertised value of the opportunity, which is £2,260,000. It is inevitable that the spend over the extension period will exceed the remaining budget of £456,241.12 and, therefore, a Cabinet report will be submitted in due course seeking approval to increase the budget assigned and to modify the Framework Agreements in line with the Contract Procedure Rules, subject to advice from the Commercial Procurement Unit and Legal Services.

Option 2: To allow the Framework Agreements to come to an end on 30 November 2024 and to identify an alternative framework agreement led by another Local Authority, but this would take time to consider and identify a solution which ensures that the costs and operation of the alternative arrangement would not have a detrimental effect on the Council's financial budget and delivery of the service.

Option 3: To allow the Framework Agreements to come to an end on 30 November 2024 and re-tender the contract. This option is not recommended as the Local Authority has a statutory duty to authorise eligible applications within a legal timeframe of 6 months and re-tendering works at this stage could result in these timeframes not being met and in less competitive pricing.

Consultation (*include any conflict of interest declared by relevant Cabinet Member consulted*)

Consultation at this stage is not deemed necessary.

Risks

There are significant risks to the Council should we not extend the Framework Agreements as alternative options could increase the cost of providing bathing adaptations significantly and with a very limited budget this would not be favourable. There would also be a reputational risk to the Council due to judicial reviews should legal timeframes not be met due to delays caused by retendering of works to alternative providers.

There is also a risk of the providers not agreeing to extend given the notice period required, communications will take place with the providers in regard to this.

Spend to date is £1,803,758.88 and the awarded value of the original contract was £2.26M. This leaves an outstanding budget of £456,241.12 which is unlikely to cover the initial 12-month extension period. Consideration of additional budget allocation should be given now to ensure no disruption in continued service provision.

Implications

Financial	<p><u>Capital Implications</u></p> <p>The extension of the contract will continue to be financed by the Disabled Facilities Grant (DFG) capital budget.</p> <p>Contracts from the framework will need to be let with the remaining DFG budget in mind and to the maximum contract value of £2.26m. (Jit Kara – Senior Accountant)</p>
Legal	<p>As detailed in the comments from within the Commercial Procurement Unit, the initial term, which expires on 30 November 2024, can be varied to extend it by 2 additional periods of 1 year. This is subject to 28 days' written notice being served on each contractor. Therefore, whilst the term can be extended, consent from the contractors to serve less than 28 days' written notice will be needed.</p> <p>Further, the report author details that there is some, but not sufficient, budget left (of the advertised contract value) to meet the anticipated requirements over the entirety of the proposed 1 year extension. This does not mean the initial term cannot be extended, it simply means the extent to which the Council can place orders for works will be limited to the remaining budget, unless the Framework Agreements are varied to increase the value. This will be dealt with under a separate report.</p> <p>Clause 2 of the terms and conditions applicable to the Framework Agreements explicitly refers to each extension of the term as a variation. Therefore, in order to justify the extensions, we need to look to rule 17 of the Contract Procedure Rules (CPRs) which deals with modifications.</p> <p>Rule 17.1(a) allows for modification that are provided for in the</p>

	<p>original contract, subject to the relevant clauses: <i>(i) list the scope and nature of possible Modifications as well as the conditions under which they may be used, and (ii) do not provide for Modifications that would alter the overall nature of the Contract or the Call-Off Contract.</i></p> <p>In this matter, the available extensions to the term are explicitly dealt with and do not affect the overall nature of the Framework Agreements.</p> <p>Rule 17 will be considered in more detail regarding the additional framework value within the Cabinet report referenced by the report author.</p> <p>Sarah Orrell – Commercial & Procurement Solicitor</p>
Equality impact including implications for Children and Young People	No negative implications to Equality from the proposed option.
Other Procurement:	<p>The framework agreement commenced on 1st December 2022 and is due to expire on 30th November 2024 with the option to extend by two (2) periods of twelve (12) months beyond the initial term. The council may vary the expiry date by giving the contractors not less than twenty eight (28) days' notice prior to the expiry of the initial term.</p> <p>As there are less than twenty-eight days until the expiry of the initial term, it is recommended that as long as both parties agree to the extension and letters are issued and signed before 30th November 2024 the council can use still use the permitted extension option. If this is not done before 30th November 2024 the contract will expire and the extension option cannot be used.</p> <p>Furthermore, as detailed in this report the spend to date is £1,803,758.88 and the awarded value of the original contract was £2.26M. This leaves an outstanding budget of £456,241.12 which is unlikely to cover the initial 12-month extension period. A modification of the contract therefore needs to be considered.</p> <p>This is a below threshold works contract which was not awarded under PCR2015 and is therefore subject to the councils CPRs. Rule 17.1 states Subject to Rule 17.2 a Modification of a Contract which is not subject to the Procurement Regulations may be permitted if the following limited criteria apply:</p> <p>(c) (i)the need for modification has been brought about by circumstances which a diligent contracting authority could not have foreseen; and (ii)the modification does not alter the overall nature of the contract.</p>


	<p>The commissioner should be satisfied that the above conditions apply and should seek approval for any additional funding that will be required to cover the extension periods.</p> <p>Rule 17.2 states that a Contract during its term shall be considered substantial for the purposes of Rule 17.1 where the Modification increases the contract value for Works by more than 15%.</p> <p>In line with the councils CPRs this contract could therefore be modified by a maximum of £339,000. Adding this to the outstanding budget of £456,241.12 would give a remaining budget of £795,241.12</p> <p>If the service want to consider both 12 month extensions and the total additional spend is likely to be greater than £795,241.12 for this period they will need to complete an exemption report seeking an exemption to the CPRs as long as the total contract value remains below the Works threshold of £5,372,609 including VAT.</p> <p>It is recommended that the first 12 month extension period is enacted whilst the service seeks approval for additional funding to prevent the contract expiring. As this is a framework agreement no works are guaranteed to the providers, so if the additional funding cannot be approved call-offs would cease once the budget envelope is used.</p> <p>Ankur Patel Interim Category Manager Commercial Procurement Unit</p>
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Has the relevant Legal Officer confirmed that the recommendations within this report are lawful and comply with the Council's Constitution?	Yes
Has the relevant Finance Officer confirmed that any expenditure referred to within this report is consistent with the Council's budget?	Yes
Are any of the recommendations within this report contrary to the Policy Framework of the Council?	No

Background Papers under Section 100D of the Local Government Act 1972: there are none.

Report author sign-off	Ayshia Akhtar
Role	Commissioning Manager Older Age Adults
Date of sign-off	21 st November 2024

Approval	
Officer approval sign-off	Jayne Ratcliffe 
Role	Director of Adult Social Care (DASS)
Date of sign-off	13 th December 2024

Approval	
Member(s) approval sign-off	Cllr Barbara Brownridge 
Role	Lead Member for Adults Health and Social Care
Date of sign-off	16.12.24