Public Document Pack

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Monday 1 September 2025

Notice of Meeting

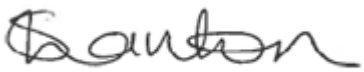
Dear Member

Cabinet

The **Cabinet** will meet in the **Council Chamber - Town Hall, Huddersfield** at **1.30 pm** on **Tuesday 9 September 2025.**

This meeting will be live webcast. To access the webcast please go to the Council's website at the time of the meeting and follow the instructions on the page.

The items which will be discussed are described in the agenda and there are reports attached which give more details.



Samantha Lawton

Service Director – Legal, Governance and Commissioning

Kirklees Council advocates openness and transparency as part of its democratic processes. Anyone wishing to record (film or audio) the public parts of the meeting should inform the Chair/Clerk of their intentions prior to the meeting.

Cabinet Members

Councillor Carole Pattison	Leader of the Council
Councillor Beverley Addy	Cabinet Member - Public Health
Councillor Moses Crook	Deputy Leader of the Council, Cabinet Member - Transport and Housing
Councillor Nosheen Dad	Cabinet Member - Adult Social Care and Corporate
Councillor Tyler Hawkins	Cabinet Member - Highways and Waste
Councillor Viv Kendrick	Cabinet Member - Children' Services (Statutory Responsibility for Children)
Councillor Amanda Pinnock	Cabinet Member - Communities and Environment
Councillor Jane Rylah	Cabinet Member - Education
Councillor Graham Turner	Cabinet Member - Finance and Regeneration

Agenda
Reports or Explanatory Notes Attached

Pages

1: Membership of Cabinet

To receive any apologies for absence from Cabinet Members.

2: Declaration of Interests

1 - 2

Cabinet Members will be asked to advise if there are any items on the Agenda in which they have a disclosable pecuniary interest, or any other interests, which may prevent them from participating in the discussion or vote on any of the items.

3: Minutes of Previous Meeting

3 - 14

To approve the Minutes of the Meeting of the Cabinet held on 8 July 2025.

4: Admission of the Public

Most agenda items will be considered in public session, however, it shall be advised whether Cabinet will consider any matters in private, by virtue of the reports containing information which falls within a category of exempt information as contained at Schedule 12A of the Local Government Act 1972.

5: Deputations/Petitions

Cabinet will receive any petitions and/or deputations from members of the public. A deputation is where up to five people can attend the meeting and make a presentation on some particular issue of concern. A member of the public can also submit a petition at the meeting relating to a matter on which the body has powers and responsibilities.

In accordance with Council Procedure Rule 10, Members of the Public must submit a deputation in writing, at least three clear working days in advance of the meeting and shall subsequently be notified if the deputation shall be heard. A maximum of four deputations shall be heard at any one meeting.

6: Questions by Members of the Public

To receive any public questions.

In accordance with Council Procedure Rule 11, the period for the asking and answering of public questions shall not exceed 15 minutes.

Any questions must be submitted in writing at least three clear working days in advance of the meeting.

7: Questions by Elected Members (Oral Questions)

Cabinet will receive any questions from Elected Members.

In accordance with Executive Procedure Rule 2.3 (2.3.1.6) a period of up to 30 minutes will be allocated.

8: Council Plan and Performance Update Report - Quarter 1 2025/2026 15 - 82

The Quarter 1 2025/2026 Council Plan and Performance Update Report provides information on progress against the 2025/26 Council Plan priorities and the performance against the 2025/26 Council Key Measures.

Contact: Mike Henry, Data and Insight

9: Corporate Financial Monitoring Report - Quarter 1, 2025-2026 83 - 170

To receive financial monitoring information for General Fund Revenue, Housing Revenue Account and Capital Plan.

Contact: James Anderson, Accountancy

10: Corporate Risk Report - Quarter 1, 2025-2026

171 - 202

To receive an update on the Corporate Risk Register for Quarter 1, 2025-26.

Contact: Martin Dearnley, Audit and Risk

11: Council Budget Strategy Update 2026-2027 and following years (Reference to Council)

203 - 252

To determine the approach to the annual update of the MediumTerm Financial Strategy.

Contact: Kevin Mulvaney, Finance

12: Our Cultural Heart, part of the Huddersfield Blueprint, Phase 2 Gateway 4

253 - 488

To consider matters relating to the progression and next stages of the cultural heart development.

Contact: David Glover, Our Cultural Heart

Exempt Information is provided within several appendices to this report.

Consideration must be given to whether the public and press should be excluded from the meeting prior to the determination of the matter to enable the exempt information to be discussed by passing the following resolution:-

To resolve that under Section 100(A)(4) of the Local Government Act 1972, the public be excluded from the meeting during the consideration of the following item of business, on the grounds that it involves the likely disclosure of exempt information, as defined in Part 1 of Schedule 12A of the Act.
It is considered that the disclosure of the information would adversely affect those third parties including the Authority and therefore the public interest in maintaining the exemption, which would protect the rights of an individual or the Authority, outweighs the public interest in disclosing the information and providing greater openness and transparency in relation to public expenditure in the Authority's decision making.

13: Kirklees Transport Strategy, Consultation Results and Adoption

489 - 598

To consider the adoption of the Kirklees Transport Strategy.

Contact: David Wildman, Skills and Regeneration

14: Simpler Recycling in Kirklees

599 - 612

To consider the implementation of a Simpler Recycling collection model.

Contact: Nick Jenkin, Operational Services

15: Kirklees Lane Rental Scheme

613 - 628

To consider the introduction of a Kirklees Lane Rental Scheme.

Contact: Donna Hodgson, Highways Management

16: Community Asset Transfer of the Hudawi Centre, Great Northern Street, Huddersfield

629 - 650

To consider the Community Asset Transfer of the Hudawi Centre.

Contact: Mark Varley, Asset Strategy

17: Community Asset Transfer of the DRAM Centre, Ridgeway, Dalton, Huddersfield

651 - 672

To consider the Community Asset Transfer of the DRAM Centre.

Contact: Mark Varley, Asset Strategy

KIRKLEES COUNCIL			
COUNCIL/CABINET/COMMITTEE MEETINGS ETC DECLARATION OF INTERESTS			
Name of Councillor			
Item in which you have an interest	**Type of interest (eg a disclosable pecuniary interest or an "Other Interest")**	**Does the nature of the interest require you to withdraw from the meeting while the item in which you have an interest is under consideration? [Y/N]**	**Brief description of your interest**

Signed: …… **Dated:** ……

NOTES

Disclosable Pecuniary Interests

If you have any of the following pecuniary interests, they are your disclosable pecuniary interests under the new national rules. Any reference to spouse or civil partner includes any person with whom you are living as husband or wife, or as if they were your civil partner.

Any employment, office, trade, profession or vocation carried on for profit or gain, which you, or your spouse or civil partner, undertakes.

Any payment or provision of any other financial benefit (other than from your council or authority) made or provided within the relevant period in respect of any expenses incurred by you in carrying out duties as a member, or towards your election expenses.

Any contract which is made between you, or your spouse or your civil partner (or a body in which you, or your spouse or your civil partner, has a beneficial interest) and your council or authority -

- under which goods or services are to be provided or works are to be executed; and
- which has not been fully discharged.

Any beneficial interest in land which you, or your spouse or your civil partner, have and which is within the area of your council or authority.

Any licence (alone or jointly with others) which you, or your spouse or your civil partner, holds to occupy land in the area of your council or authority for a month or longer.

Any tenancy where (to your knowledge) - the landlord is your council or authority; and the tenant is a body in which you, or your spouse or your civil partner, has a beneficial interest.

Any beneficial interest which you, or your spouse or your civil partner has in securities of a body where -
(a) that body (to your knowledge) has a place of business or land in the area of your council or authority; and
(b) either -

the total nominal value of the securities exceeds £25,000 or one hundredth of the total issued share capital of that body; or
if the share capital of that body is of more than one class, the total nominal value of the shares of any one class in which you, or your spouse or your civil partner, has a beneficial interest exceeds one hundredth of the total issued share capital of that class.

Contact Officer: Yolande Myers

KIRKLEES COUNCIL

CABINET

Tuesday 8th July 2025

Present:	Councillor Carole Pattison (Chair) Councillor Beverley Addy Councillor Moses Crook Councillor Tyler Hawkins Councillor Viv Kendrick Councillor Amanda Pinnock Councillor Jane Rylah Councillor Graham Turner
Observers:	
	Councillor Tanisha Bramwell Councillor Paul Moore Councillor Cathy Scott Councillor John Taylor
Apologies:	Councillor Nosheen Dad

13 Membership of Cabinet
Apologies were received on behalf of Councillor Nosheen Dad.

14 Minutes of Previous Meeting
RESOLVED – That the Minutes of the Meeting held on 10 June 2025 be approved as a correct record.

15 Declaration of Interests
No interests were declared.

16 Admission of the Public
It was noted that all agenda items would be considered in public session.

17 Deputations/Petitions
No deputations or petitions were received.

18 Questions by Members of the Public
No questions were asked.

19 Questions by Elected Members (Oral Questions)
Cabinet received the following questions in accordance with Executive Procedure Rule 2.3;

Question from Councillor Scott

"In November 2024 Council passed a motion instructing Cabinet to act on ethical procurement to ensure that the Council was not complicit in human rights violations through its supply chains. Cabinet has not provided a response, taken a decision, or provided political leadership, and the issue was directed to Corporate Governance and Audit Committee, with no portfolio holder responsible and no record of delegated authority. Why did Cabinet not take ownership of this procurement report?"

A response was provided by the Leader of the Council (Councillor Pattison)

Question from Councillor Moore

"I have previous asked, since the closure of Nab Lane six months ago, has an impact assessment been carried out to look at the Dewsbury site, looking at capacity and safety issues with increased demand. Why have I not received a response?"

A response was provided by the Cabinet Member for Highways and Waste (Councillor Hawkins)

Question from Councillor Bramwell

"St John's church in my ward has had ongoing maintenance issues. In 2020 during Covid, the Council could not cut the grass in the cemetery so I, along with residents cut back the churchyard on the proviso that the Council would, with the agreement of the church, continue to maintain it. However, I am told that the churchyard hadn't had the grass cut in months until the Council did so just recently. Despite this, I am told there is still no agreement in place for ongoing maintenance. Can I get commitment from the Council for regular maintenance of this churchyard?"

A response was provided by the Cabinet Member for Communities and Environment (Councillor A U Pinnock)

Question from Councillor Taylor

"Can you tell me how often, and when, you have met with the farming community?"

A response was provided by the Leader of the Council (Councillor Pattison)

Question from Councillor Scott

"Have there been any issue with flagstones that have been laid in front of Dewsbury Town Hall? Is there an issue with the quality and standard of work with these flagstones, as I was aware work did stop. Can I get an assurance that the work will continue and be of good quality, rather than having to revisit this at great cost?"

A response was provided from the Cabinet Member for Finance and Regeneration (Councillor Turner)

Question from Councillor Taylor

"The motion at a previous Council meeting was asking for the Leader to write to the Government and to meet with the farming community. Can I ask the Leader to meet with the farming community to ask how the Council could support that community and whether, in terms of procurement, we can ensure that the Council buys locally?"

A response was provided by the Leader of the Council (Councillor Pattison)

Question from Councillor Bramwell

"In relation to Dewsbury Town Centre, having discussed with young people who use the Town Centre to meet friends, there are certain times, even including during the day that the won't go into the Centre. There are also parts of the Town Centre that they won't go into, such as Daisy Hill and the bus station. The traders in the market are worried and as a woman, I am worried at times. There appears to be no prevention in place, and having spoken to West Yorkshire Police who are doing all they can, but what are the Council doing to make Dewsbury Town Centre safer?"

A response was provided by the Cabinet Member for Finance and Regeneration (Councillor Turner)

Question from Councillor Moore

"Both myself and Councillor Scott have been reporting more incidents of fly tipping than ever before, which suggests there has been a notable rise. Since the closure of Nab Lane waste site, what increase has there been, if any, in the levels of fly tipping in Dewsbury?"

A response was provided by the Cabinet Member for Highways and Waste (Councillor Hawkins)

Question from Councillor Taylor

"I am a member of the Waste Strategy Working Group and meetings in diaries had been cancelled as Overview and Scrutiny Management Committee was to be consulted before the working group met. Due to there being no meetings planned, can I ask what has happened to the working group?"

A response was provided by the Cabinet Member for Highways and Waste (Councillor Hawkins)

Question from Councillor Bramwell

"At the last Cabinet meeting, I raised an issue about Moor End Lane in Dewsbury. I was advised that Cllr Crook would look into the problem, and although I've received an e-mail to advise he was making enquires, I've received no further response. I have met with housing officers and safer Kirklees, so could I ask when I will receive a response?"

A response was provided by the Cabinet Member for Transport and Housing (Councillor Crook)

20 Council Financial Outturn & Rollover Report 2024/25 incorporating General Fund Revenue, Housing Revenue Account, Capital and Treasury Management (Reference to Council)

(Under the provision of Council Procedure Rule 36(1), Cabinet received a representation from Councillors Scott and Taylor).

Cabinet gave consideration to a report, prior to its submission to Council, which set out information on the Council's 2024/25 financial outturn position for General Fund Revenue, Housing Revenue Account (HRA), and Capital Plan, including proposals for revenue and capital rollover from 2024/25 to 2025/26.

The report advised that the outturn position had improved significantly to a £5.6 million overspend, compared to a projected overspend of £13 million at Quarter 3. This improvement was attributed to tighter financial controls, including recruitment restrictions, maximisation of external funding, and underspends in central budgets. The year-end position on reserves and balances stood at £61.1 million, with the general reserve maintained at £25 million. The HRA reported an operational underspend of £1.3 million, although a £4.6 million revenue contribution to capital required a £3.3 million drawdown from reserves.

The slides contained within the considered report provided a detailed breakdown of the outturn financial monitoring position in relation to (i) General Fund revenue outturn by service area, (ii) General Fund reserves and balances movements in-year, (iii) HRA revenue outturn and reserve movements, (iv) Capital outturn position of £140.6 million, (v) the Council's Collection Fund deficit of £10.2 million, and (vi) Treasury Management activity and prudential indicators. It was noted that, subject to approval, capital slippage of £13.7 million and the update of the multi-year capital plan (now totalling £1.273 billion) would be incorporated into in-year financial monitoring in 2025/26 and reported quarterly to Cabinet from Quarter 1 onwards.

RESOLVED -

<u>General Fund</u>

1) Note the improved revenue outturn position of +£5.6m overspend for 2024/25 (+£9.9m at Q3);
2) Note the year end position on reserves and balances of £61.0m (excluding Statutory Reserves), particularly that the level of general reserve remains unchanged at £25m (paragraphs 3.2.19- 22);
3) Approve the creation of the Strategic Budget Contingency reserve (paragraph 3.2.21), with a balance of £3.5m at 31/3/25; funded from the Voluntary Revenue Provision Reserve;
4) Note the application of the Councils flexible capital receipts strategy to the value of £5.5m applied against eligible transformation costs in 2024/25

thereby reducing revenue expenditure, in accordance with the agreed budget (paragraph 3.2.32);

5) Note the regular monitoring and review of corporate reserves in 2025/26 to be reported to Cabinet as part of the Quarterly financial monitoring cycle;
6) Note the year end deficit position on the Collection Fund of £10.2m;

HRA

7) Note the HRA revenue outturn position for 2024/25 as an underspend of £1.3m reducing the contribution to capital in 24/25 by £1.3m. Note the year end reserves balance of £30.6m compared to £33.9m in 23/24;

Capital

8) Note the Council capital outturn position at £140.6m for 2024/25
9) Approve the £13.7m capital slippage from 2024/25 to 2025/26 and removal of £0.4m uncommitted rollover from the Capital Plan (paragraph 3.2.33);
10) Note the revised capital plan for the period 2025/26 onwards after taking into account the re-phasing of schemes and additional grant funding assumptions (Appendix 4a: Summary Capital Plan and Appendix 4b: Detailed Capital Plan); Dedicated Schools Grant (DSG)
11) Note the cumulative deficit on the DSG of £63.8m, an increase of £20.1m from the previous year, and that this deficit was excluded from the Council's balance sheet as a result of the Statutory Override as set out in the Local Authority Capital Finance and Accounting Regulations. Also to note the recent two year extension to Statutory Override, which now ends in March 2028 pending further consultation updates from Government expected in Autumn 2025.

Treasury Management

12) Note the Review of Treasury Management activity for 2024/25 (Appendix 5)

21 Q4 2024/25 Council Plan and Performance Update Report

(Under the provision of Council Procedure Rule 36(1), Cabinet received a representation from Councillor Taylor).

Cabinet considered the Quarter 4 update on the Council Plan and Performance for 2024/25, which outlined progress against the Council's four strategic priorities and key performance indicators.

Cabinet was advised of a stabilising financial position, with the general fund overspend reduced to £5.6 million. The 2025/26 budget included £387 million in net revenue and a £1.4 billion capital programme, alongside £11 million in new savings. The report advised that service transformation continued across adult social care, children's services, and housing, with notable developments including the launch of a new reablement model, improved SEND provision, and enhanced tenant engagement strategies.

Cabinet noted ongoing investment in regeneration, climate action, and public health, but was aware that challenges remained in areas including fly tipping, housing repairs, and Freedom of Information / Subject Access Request response times, which were being actively monitored.

RESOLVED – That the Q4 2024/25 Council Plan and Performance Update Report be noted.

22 Corporate Risk Report, Quarter 4 2024-25

(Under the provision of Council Procedure Rule 36(1), Cabinet received a representation from Councillor Taylor).

Cabinet received the Quarter 4 update on the Corporate Risk Register. It was noted that no new risks had been added or removed during the quarter. Three risks had seen a reduction in score (i) Budget Monitoring and Management (ii) Medium Term Financial Sustainability and (iii) Adults Safeguarding. Cabinet noted that these reductions reflected improvements in financial stability and safeguarding processes, including the clearance of referral backlogs and the implementation of a more integrated front-door approach in Adult Social Care.

Cabinet was advised that significant progress had been made in stabilising the Council's financial position, supported by the establishment of a Strategic Budget Contingency Reserve and enhanced governance arrangements.

Cabinet noted that several high-rated risks remained static, including those related to talent management, cyber security, contract management, SEND provision, and housing safety. Controls and mitigation strategies were in place across all areas, with ongoing actions to strengthen governance, improve data quality, and enhance service resilience.

RESOLVED – That the Corporate Risk Register for quarter 4 2024-25 be noted.

23 Local Government Association (LGA) Corporate Peer Challenge - Kirklees Council Action Plan Progress Report

Cabinet received a progress update on the Council's action plan developed in response to the LGA Corporate Peer Challenge conducted in November 2024. The action plan outlined improvement activities aligned with eight key recommendations from the LGA. The report presented an update on progress as of June 2025, noting that three actions had been fully completed, including improvements to transformation resourcing, member-officer protocol awareness, and decision-making report clarity. Of the remaining 39 actions, 38 were on track for delivery, with one action, related to the Assets Property Transformation Programme, experiencing minor delays due to external factors.

Cabinet noted the comprehensive progress made across all eight recommendation areas, including financial planning, transformation, regeneration, planning, economic development, governance, service performance, and strategic decision-making. Cabinet was advised that the Council remained confident in its delivery trajectory, with further actions expected to be completed ahead of the LGA's scheduled

progress review in September 2025. The full list of actions and delivery statuses was appended to the report.

RESOLVED – That progress against the LGA's recommendations and agreed action plan be noted.

24 Kirklees Inclusive Economy Strategy (Reference to Council)
(Under the provision of Council Procedure Rule 36(1), Cabinet received a representation from Councillors Moore, Scott and Taylor).

Cabinet considered a report which sought endorsement of the Kirklees Inclusive Economy Strategy (KIES) ahead of its submission to Council on 16 July 2025. The strategy, framed as a partnership document, set out the Council's ambition to develop a productive, inclusive, and environmentally sustainable local economy. It aligned with the UK Modern Industrial Strategy and the West Yorkshire Local Growth Plan and represented the final top-tier strategy alongside the Inclusive Communities Framework, Health and Wellbeing Strategy, and Environment Strategy.

Cabinet noted that the strategy would support delivery of the Council Plan 2025/26, particularly the priority on local economic growth. Subject to Council approval, the strategy would be launched alongside a communications campaign and dedicated webpage.

RESOLVED - That the Kirklees Inclusive Economy Strategy be submitted to the meeting of Council on 16 July 2025 with a recommendation to adopt.

25 Joint West Yorkshire Mass Transit Spatial Development Framework Development Plan Document (Reference to Council)
(Under the provision of Council Procedure Rule 36(1), Cabinet received a representation from Councillor Scott).

Cabinet considered a report outlining proposals for the preparation of a Joint West Yorkshire Mass Transit Spatial Development Framework (SDF) Development Plan Document (DPD), in collaboration with the West Yorkshire Combined Authority (WYCA) and the five other West Yorkshire local authorities. Cabinet noted the purpose of the SDF DPD was to provide a coordinated strategic planning framework to support the development of a regional mass transit system, aligning with local plans and enabling the submission of a Transport and Works Act Order by 2027.

Cabinet noted that whilst Kirklees was not directly affected by the initial mass transit routes, early involvement was essential to influence the regional planning framework and support long-term growth ambitions. The report advised that the work would be resourced through existing budgets and supported by WYCA appointed consultants.

RESOLVED –

1) That following and subject to approval (2) at Council, approval be given to the establishment of a Joint Member Committee to oversee the drafting of the

joint West Yorkshire Mass Transit Spatial Development Framework Part 1 Development Plan Document.

2) That the proposal to produce a Joint West Yorkshire Mass Transit Spatial Development Framework Part 1 Development Plan Document be submitted to a meeting of Council with a recommendation to approve.
3) That subject to (1) the proposal to delegate authority for initial early engagement and public consultation (Regulation 18) on the draft joint West Yorkshire Mass Transit Spatial Development Framework Development Plan Document and to prepare the submission draft and consultation for Regulation 19 to the Joint Member Committee be submitted to a meeting of Council with a recommendation to approve.

26 Local Development Scheme Revisions

Cabinet considered a report seeking approval for the revised Local Development Scheme (LDS), which set out a three year timetable for the preparation of development plan documents, including the Kirklees Local Plan and policy guidance. The LDS was a statutory requirement and was essential for ensuring transparency and accountability in the plan making process. The revised LDS reflected updated national planning policy, legislative changes, and revised timelines for the Local Plan and the potential Joint West Yorkshire Mass Transit Spatial Development Framework (SDF).

Cabinet noted that the revised LDS responded to delays in the previous timetable due to changes in national planning policy, including new guidance on Green Belt and Grey Belt land, and the absence of key national development management policies. The LDS included a revised Local Plan timetable and outlined preparatory work for a joint Mass Transit SDF in collaboration with West Yorkshire authorities.

RESOLVED –

1) That approval be given to the Local Development Scheme July 2025 as outlined at Appendix 1 of the considered report.
2) That authority be delegated to Service Director, Skills and Regeneration to publish the approved Local Development Scheme on the council's website.
3) That authority be delegated to Service Director, Skills and Regeneration to send a copy of the adopted Local Development Scheme to Ministry of Housing, Communities and Local Government.
4) That authority be delegated to the Service Director, Skills and Regeneration to make any minor amendments and corrections to the Local Development Scheme.

27 Surplus Property Disposals 2025/26 and consideration of objection to the disposal of Public Open Space at Grasscroft, Almondbury

Cabinet considered a report which sought approval to bring forward a Supplementary Capital Receipts Schedule for 2025/26, identifying additional surplus property assets to support the Council's capital receipts target of £6 million for the financial year. The report outlined the strategic importance of continuing to rationalise the Council's estate to reduce long-term revenue commitments and support regeneration.

Cabinet noted the statutory requirement to consider an objection received in response to the proposed disposal of public open space at Grasscroft, Almondbury. The objection, which included a petition signed by 36 residents, raised concerns about potential future development, environmental impact, and the loss of greenbelt land. However, it was noted that the objection did not identify any current recreational use or amenity value of the land.

Cabinet also considered the revocation of highway improvement lines at Walkley Lane, Heckmondwike, which were no longer required. The removal of the lines would enable the land to be sold without restriction, thereby improving its marketability.

RESOLVED –

1) That approval be given to the disposal of the land and property within the Supplementary Capital Receipts Schedule 2025/2026 to support the Council's income targets.
2) That authority be delegated to the Executive Director for Place in consultation with the Portfolio Holder for Finance and Regeneration, to negotiate and agree terms and complete the sales of any land and property identified within the Supplementary Capital Receipts Schedule 2025/2026.
3) That, having considered and dismissed the objection to the disposal of public open space, approval be given to the disposal of the land at Grasscroft, Almondbury, shown edged red on the plan at Appendix B of the considered report.
4) That authority be delegated to the Executive Director for Place to negotiate and agree terms and complete the sale of the land at Grasscroft, Almondbury.
5) That authority be delegated to the Service Director – Legal, Governance and Commissioning to enter into all agreements necessary to effect any of the disposals approved in (1) and (3).
6) That the highway improvement lines as shown in the plan at Appendix C and as identified in paragraphs 2.20 - 2.22 of the considered report be revoked.

28 2025/26 - 2026/27 Corporate Landlord Capital Plans - Proposed allocation of capital funding

(Under the provision of Council Procedure Rule 36(1), Cabinet received a representation from Councillor Taylor).

Cabinet considered a report which outlined the proposed allocation of capital funding for the Corporate Landlord baseline programmes for the financial years 2025/26 and 2026/27. The report detailed investment plans across three key areas (i) Asset Investment, (ii) Compliance, and (iii) Welfare, with a combined allocation of over £20 million across the two years. The programme aimed to address urgent condition issues, health and safety requirements, and suitability improvements across the Council's property portfolio.

Cabinet noted the importance of prioritising investment based on condition surveys, fire risk assessments, and service needs. Specific projects included essential works at Scissett Baths, improvements to the Walsh Building in Dewsbury, and the

demolition of the former Birkdale High School site. Investment in heritage buildings such as Oakwell Hall and Tolson Museum was also noted as a key priority.

Cabinet acknowledged the need for flexibility in managing the programme, particularly in light of market volatility in the construction sector and would allow for adjustments to project scope and timing as necessary to ensure efficient delivery and value for money. Cabinet also noted the inclusion of external funding contributions, including grants from Sport England and the Trustees of Clayton West, to support specific schemes.

RESOLVED –

1) That the programmes of work for 2025/26 – 2026/27 as shown in Appendix be approved.
2) That authority be delegated to the Service Director – Development in consultation with the Portfolio Holder to: -

    (i) add or delete projects from the programmes, provided that the total cost of the programmes remains within the approved capital allocations,
    (ii) transfer resources between the Corporate Landlord programmes without restrictions,
    (iii) slip, delete or reallocate budget between projects during the two financial years, provided that the total cost of the programmes remains within the approved capital allocations.

3) To approve acceptance and addition to the Capital Plan of £76,006 (retrospective for £68,405 already applied in 2024/25) grant from Sport England and £100K capital from the Trustee of Clayton West to be vired into the Scissett Baths budget as agreed contributions.

29 Update Regarding Progress with the Regulatory Notice

(Under the provision of Council Procedure Rule 36(1), Cabinet received a representation from Councillor Taylor).

Cabinet received a report providing an update on the Council's progress in addressing the requirements set out in the Regulatory Notice issued by the Regulator of Social Housing in March 2024. The notice followed a self-referral by the Council, which identified significant failings in fire safety, damp and mould management, water hygiene, and data governance. Cabinet noted the comprehensive improvement programme implemented in response, including the establishment of a revised governance framework, the appointment of external partners, and recruitment to strengthen delivery capacity.

Cabinet was advised of substantial progress in fire safety, with over half of the required Fire Risk Assessments completed and thousands of remedial actions identified and being addressed. In relation to damp, mould, and condensation, the backlog of cases had been significantly reduced, and the Council was on track to reach a business as usual position by August 2025. Improvements in water hygiene compliance, the commencement of a new stock condition survey programme, and

the implementation of upgraded IT systems were also noted as key developments supporting regulatory compliance and service improvement. Cabinet noted that the Council aimed to have the Regulatory Notice removed by the end of the calendar year.

RESOLVED – That the update on progress relating to the Regulatory Notice issued by the Regulator of Social Housing be noted.

30 Variation to the Terms of the Tenancy Agreement

Cabinet considered a report seeking approval to vary the terms of Kirklees Council's Tenancy Agreement, which had not undergone a comprehensive review since 2016. The changes aimed to ensure the agreement reflected current policy, legislation, and service delivery standards, particularly following the reintegration of the former Kirklees Neighbourhood Housing, into the Council in 2021. The review addressed key areas such as access for compliance checks, responsibilities for repairs, rent and service charges, anti-social behaviour, and tenancy fraud.

Cabinet was informed that a statutory consultation had been undertaken in accordance with Section 103 of the Housing Act 1985. Over 21,000 tenants were invited to comment on the proposed changes. The 798 responses received gave general support for clearer responsibilities, improved enforcement, and enhanced safety provisions.

Cabinet noted that the proposed variations would strengthen the Council's ability to manage its housing stock effectively and meet the expectations of the Regulator of Social Housing. The revised agreement would provide greater clarity on tenant and landlord responsibilities, support compliance with consumer standards, and enable more responsive service delivery.

RESOLVED - That the variation to the Council's Tenancy Agreement be approved, to take effect from Monday 18 August 2025.

31 White Rose Forest Strategic Plan 2025-2050

The Cabinet received a report outlining the White Rose Forest (WRF) Strategic Plan 2025–2050. The Plan was presented as a long-term strategic framework for increasing tree cover, enhancing biodiversity, and supporting climate resilience across North and West Yorkshire. Cabinet noted that the Council, acting as the accountable body for the WRF partnership, had played a significant role in the development and coordination of the Plan, which aligned with national targets and the Government's Trees for Climate programme.

Cabinet was advised that the Strategic Plan set out five key objectives, including (i) increasing tree canopy cover, (ii) restoring woodlands, (iii) engaging communities, (iv) promoting the benefits of trees, and (v) ensuring the sustainability of the WRF. The Plan was expected to underpin future funding bids and guide the development of a detailed five-year Action Plan (2025–2030). The report outlined that the WRF had already exceeded its woodland creation targets, with over 2,000 hectares planted and significant investment secured through DEFRA grants.

RESOLVED – That approval be given to the White Rose Forest Strategic Plan 2025-50.

32 Air Quality Management Areas for Revocation or Amendment 2025

Cabinet received a report detailing the progress made in improving air quality across the borough and the resulting proposal to revoke or amend six of the ten designated Air Quality Management Areas (AQMAs) in Kirklees.

Cabinet noted that a statutory review and consultation process had been undertaken in line with DEFRA guidance, which confirmed that revocation or amendment was appropriate in these cases. The proposed changes included the full revocation of AQMAs at Cooper Bridge and Bradley, Scouthill, and Birkenshaw, and amendments to AQMAs at Ainley Top, Liversedge, and Thornton Lodge. It was acknowledged that while some areas within the amended AQMAs continued to exceed air quality standards, others had shown consistent compliance, justifying a reduction in their geographical scope. The report also confirmed that air quality monitoring would continue borough-wide, and any future exceedances would be addressed accordingly.

Cabinet was informed that the revocation and amendment process would be completed by the end of August 2025.

RESOLVED – That under the provisions of the Environment Act 1995: -

1) the Air Quality Management Areas in (i) AQMA1 Copper Bridge and Bradley (ii) AQMA2 Scouthill and (iii) AQMA4 Birkenshaw, be revoked.
2) the Air Quality Management Areas in (i) AQMA3 Ainley Top, (ii) AQMA7 Liversedge and (iii) AQMA10 Thornton Lodge, be amended.
3) authority be delegated to the Head of Public Protection to carry out all necessary steps to execute the revocation or amendment of the Air Quality Management Areas.
4) authority be delegated authority to the Service Director, Legal, Governance and Commissioning to enter into and execute any documents necessary to revoke or amend the Air Quality Management Areas.

Q1 2025/26 Council Plan and Performance Update Report

Meeting	Cabinet
Date	9th September 2025
Cabinet Member (if applicable)	Councillor Carole Pattison
Key Decision **Eligible for Call In**	No No
Purpose of Report The Q1 2025/26 Council Plan and Performance Update Report provides information on progress against the 2025/26 Council Plan priorities and the performance against the 2025/26 Council Key Measures.	
Recommendations • It is recommended that the report is noted.	
Resource Implication: None	
Date signed off by <u>Executive Director</u> & name **Is it also signed off by the Service Director for Finance?** **Is it also signed off by the Service Director for Legal Governance and Commissioning?**	Rachel Spencer-Henshall, Deputy Chief Executive & Executive Director of Public Health and Corporate Resources – 27/08/2028 Kevin Mulvaney, Service Director – 21/08/2025 Sam Lawton, Service Director – Legal, Governance and Commissioning (Monitoring Officer) – 27/08/2025

Electoral wards affected: Not applicable

Ward councillors consulted: Not applicable

Public or private: Public

Has GDPR been considered? No personal data within report

1. Executive Summary

The Q1 2025/26 Council Plan and Performance Update Report provides Executive Leadership Team, Executive Board, Cabinet and Scrutiny Panels/Committees with –

- A narrative update against each of the four Council Plan priorities. This includes an update on progress and activities delivered in the quarter and planned activities for the next quarter.
- An update and narrative against the 2025/26 Council Key Measures. This includes an update on progress and activities delivered in the quarter and planned activities for the next quarter.

This section summaries the key issues and highlights based on a review of trends against the key measures within the report:

Key Issues

- **The number of people open to adult social care (all ages) has risen by 326 (6.5%) over the last 12 months**. The number of nursing and residential service users has increased by 38 over the last 3 months with the number of younger people (18-64) living in residential and nursing care higher than the national average.
- **The number of Looked After Children (LAC) has risen by 70 (12%) over the last 12 months**. The number of LAC increased from 589 at the end of Q1 2024/25 to 659 at the end of Q1 2025/26. The number of LAC within Kirklees continues to be lower than statistical neighbour benchmarks.
- **The number of fly tipping incidents has risen by 197 (8%) compared to the same period 12 months ago.** There is currently a backlog of 1,400 reports with wait times of up to 12 weeks. The number of fly-tipping incidents in Kirklees is higher than regional benchmarks.

Key Highlights

- **The timeliness of Education, Health and Care Plans (EHCPs) has improved significantly during Q1 2025/26.** 63.1% of EHCPs were finalised within 20 weeks during Q1 2025/26, an increase of 37.2 percentage points compared with Q1 2024/25. The timeliness of finalising EHCPs during Q1 2025/26 is better than the latest published national rate of 46.4%.
- **The number of open damp, mould and condensation (DMC) cases has reduced significantly during Q1 2025/26.** At the end of Q1 2025/26, there were 463 open cases. A reduction of 761 (62%) cases compared to the end of Q1 2024/25 and 1,250 (73%) cases compared to the end of Q4 2024/25. The current number of open DMC cases as a percentage of housing stock is now lower than the latest national benchmark.
- **The number of households in temporary accommodation has reduced by 96 (20%) compared to 12 months ago.** 378 households were in temporary accommodation at the end of Q1 2025/26 compared to 474 at the end of Q1 2024/25.

The Council Key Measures are a fundamental part of the quarterly reporting arrangements. The Council Key Measures reflect and represent the most critical and important areas of the Council with consideration of the Council's strategic priorities for 2025/26; the Council's transformation programmes; the Council's statutory functions and responsibilities; the Council's regulatory requirements; risks to the Council; and the Council's resources (finance and people).

2. Information required to take a decision

Cabinet is invited to consider this report in relation to the Council Plan deliverables contributing to the Kirklees Shared Outcomes and the Council's aspiration to be effective and efficient in the delivery of its services.

3. Implications for the Council

This report provides an update on performance against the 2025/26 Council Key Measures. This will enable the Council to effectively monitor performance and drive further improvements.

3.1 Council Plan

The report provides an update on progress against the priorities within the Council Plan

3.2 Financial Implications

There are no financial implications.

3.3 Legal Implications

There are no legal implications.

3.4 Other (e.g. Risk, Integrated Impact Assessment or Human Resources)

There are no other implications

3.5 Integrated Impact Assessment (IIA)

No Integrated Impact Assessment (IIA) is needed

4 Consultation

No consultation is required, this report is for information only.

5 Engagement

No engagement is required, this report is for information only.

6 Options

6.1 Options Considered

It is recommended that the report is noted.

6.2 Reasons for recommended Option

This report is for information only.

7 Next steps and timelines

Updates will be shared on a quarterly basis with Cabinet Members and members of the public. The provision of these quarterly updates will enable Executive Directors, the Chief Executive and Cabinet Members to monitor progress against key priorities and enact change where needed, to maximise improvements and outcomes for people and places.

8 Contact officer

Head of Data and Insight, Mike Henry
Telephone – 01484 221000
Email – Mike.Henry@kirklees.gov.uk

9 Background Papers and History of Decisions

Not applicable.

10 Appendices

Not applicable.

11 Service Director responsible

Rachel Spencer-Henshall, Deputy Chief Executive & Executive Director of Public Health and Corporate Resources

Kirklees Council

Council Plan and Performance Update Report

Quarter 1 2025/26

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Council Plan Priorities Update – Quarter 1 2025/26

Introduction

This report provides an update on the 12-month deliverables outlined within the 2025/26 Council Plan. Progress updates in this report cover up until the end of June 2025 and further updates will be included in future quarterly reports.

The deliverables reported upon in this report relate to the four, three-year priorities outlined in the Council Plan. These are:

1. Getting the basics right – a balanced budget and a modern organisation.
2. Protecting the vulnerable and achieving inclusion.
3. Thriving people and communities – now and over the longer term.
4. Local economic growth, working with regional and national partners

These priorities don't aim to cover all the many services and programmes undertaken throughout the council, they aim to summarise the overarching strategic direction for our activity in the current context and with the resources that we have available.

You can find the 2025/26 version of the Council Plan at www.kirklees.gov.uk/councilplan.

Priority 1 – Getting the basics right – a balanced budget and a modern organisation

We've delivered several workstreams that are supporting improvements in service delivery across all areas of the council. We continue to have a good grip on our budget and have mitigations in place to control and manage demand-led budgetary challenges as they emerge. The 'Our Council' culture change initiative was launched in April, celebrating areas of strength and collecting ideas and feedback on areas where services want to do more. The initiative covers seven principles including 'getting the basics right'. We've delivered workshops, events, internal communications and surveys, with more work planned to promote and embed the principles over the coming year.

Getting the basics right for our high demand services and having more of a customer focus

Kirklees residents can now dispose limited amounts of household DIY waste for free at Household Waste & Recycling Centres at Emerald Street in Huddersfield and Weaving Lane in Dewsbury. In addition, Meltham HWRC now has an additional 20 parking spaces on site helping more people access the site and reduce some waiting times. Access to the skips on site has been improved making it easier for site users to dispose of garden, cardboard, and general waste.

In May 2025, Cabinet agreed a new Highways Capital Plan for 2025-27. This plan sets out £37.2 million of council investment over two years. This covers all aspects of highways essential works including road surfacing and potholes.

During the first quarter, we've continued to make progress with the implementation of the Customer & Access Programme. Work has included a focus on improving our digital offer for customers when reporting missed bins. We have also delivered internal workshops to collect ideas on how we can embed a more customer focused culture and make improvements to services.

Getting the basics right to be an efficient and effective organisation

At the start of the first quarter, Cabinet approved an action plan setting out how we will act on the recommendations from the Local Government Association (LGA) Corporate Peer Challenge, which took place in November 2024. Delivery is underway and an initial update was provided to Cabinet in July 2025 to share progress so far against delivery of the actions. In September 2025, the LGA will come back to Kirklees to undertake a progress review, and a report outlining the LGAs findings will then be published by the end of November 2025.

We have also begun to make progress in improving our approach to benchmarking and our quarterly corporate performance and finance monitoring for this first quarter, for example, by including a new quarterly capital financial monitor. We have also reviewed and made changes to our quarterly check and challenge process, allowing greater scrutiny and a more effective approach to reviewing performance against financial information and key risks at a service level, and to support services with benchmarking performance against other local authority areas.

Getting the basics right to ensure we have financially sustainable services

In July 2025, Cabinet approved the 2024/25 'Outturn' report – which reported an improved revenue position at the end of the last financial year. Subsequent financial management and grip is leading to a cautious Q1 forecast of £5.9m overspend this year, which is expected to come down through action during the course of the year. We have also produced and will be publishing a budget book, providing a breakdown of all service budgets. This will help support greater transparency and better service financial planning and management across all services in the council. During this last quarter, we have also been working on the development of a 3-year budget as part of September's MTFS (Medium-Term Financial Strategy), which will also include an updated strategy for sustainably increasing reserves over time. We have also drafted an approach to deciding on our priorities for securing additional external investment, which will be implemented by the end of the financial year.

Priority 2 – Protecting the vulnerable and achieving inclusion

Inclusive care and support

In June 2025, the Local Area Partnership was inspected by Ofsted and the Care Quality Commission for the arrangements we have in place for SEND and Alternative Provision.

In June 2025, Cabinet agreed funding to enable 18 new places for children with complex communication and interaction needs at New Mill Infants and New Mill Junior schools 'Additionally Resourced Provision'. In July, the Department for Education gave final approval for the provisions to be established.

We are progressing the projects to rebuild and expand two of our Special Schools. Woodley School and College will be rebuilt at Fernside Avenue, Almondbury, expanding to around 180 places with state of the art facilities and the new school site is now being prepared for building to begin. Joseph Norton Academy is being rebuilt on a site in Deighton, and the building work will begin in July 2025. Joseph Norton will be able to provide additional places for children with Social Emotional and Mental Health needs. Fourteen Kirklees schools have taken part in a pilot scheme of the Partnerships for Inclusion of Neurodiversity in Schools. The project was co-led with our Parent Carer Forum, Parents of Children with an Additional Need (PCAN), and brought together experts to work with a group of mainstream primary schools to offer training and enable greater understanding of neurodiversity in order to support children and families and strengthen relationships with pupils' families. A second phase of 10 primary schools is expected to start soon.

Work has begun to modernise day care facilities that will enable up to 40 adults living with complex learning disabilities and autism to access vital respite support. Existing premises in Heckmondwike will be transformed to modern facilities that will better meet people's needs. An inclusive organisation

As set out in our Inclusion & Diversity Strategy (2024-27), We want to be an organisation where our people and those we work with have equal access to opportunities and resources and feel valued for who they are. This will help us create a more cohesive, innovative, sustainable, and effective organisation that delivers better outcomes for everyone, and it will help us attract and retain staff, who will be able to deliver to their full potential.

This quarter, we have rolled out ringfenced apprenticeships for care leavers and our guaranteed interview pledge and developed new guidance for employee networks, to support them in their crucial role helping employee engagement. In June, we launched a new initiative aimed at making information more accessible for everyone in the community. As part of our ongoing commitment to inclusion, we published Easy Read guidance to help local organisations communicate more clearly with people who have learning disabilities, cognitive impairments, or low literacy levels.

Preventing homelessness and rough sleeping

On preventing homelessness and rough sleeping, we have enhanced our partnership working and strengthened our early intervention resources to ensure that we improve access to good quality, affordable accommodation and thereby prevent homelessness and rough sleeping occurring. This has included working closely with private sector landlords, supported housing providers and housing associations to increase the number of suitable homes available for those in acute housing need, developing a tenancy rescue pilot, and expanding options for leasing accommodation. This together with several other interventions has resulted in a month on month decrease in the number of homeless households in temporary accommodation since June 2024 including a reduction in households with children residing in B&B accommodation for over 6 weeks. Planning for the Renters Rights Bill/Act is also underway to understand its likely impact and communication with all relevant stakeholders will be shared after enactment.

Priority 3 – Thriving people and communities – now and over the longer-term

Children and Families

Kirklees Council continues to prioritise the wellbeing and development of children and families through strategic collaboration and integrated service delivery. A major focus this quarter has been strengthening partnerships with schools and educational settings, supported by long-term planning and investment in infrastructure, capacity, and modern learning environments. These efforts aim to ensure education remains responsive and community aligned. Our work with our mainstream schools in local Clusters, had begun to embed and is enabling support for children with additional needs.

Building on Children's Services' ambition to provide highly effective services to children and families, the Council is embedding integrated service delivery to support universal and targeted needs. This means that we provide the right help at the right time through the development of our inclusive support systems which is helping address the educational, emotional, and social needs of young people, fostering resilience and long-term positive outcomes.

Clean, Safe and Healthy Places

Housing safety has improved, with damp and mould cases reduced below target, 70% of fire safety assessments completed, and water quality rated low risk. Environmental sustainability remains a priority, with Kirklees earning a place on the CDP 'A List' for climate action. Projects like the Spen Valley Greenway upgrade and White Rose Forest plan are enhancing green infrastructure. Community tools and awareness campaigns are empowering residents to contribute to a healthier environment.

Through Safer Kirklees, the Council has tackled public safety issues, including anti-social behaviour and fire risks at Clough House, Birstall. Multi-agency operations using the Clear, Hold, Build framework led to 77 arrests and the seizure of illegal goods, showcasing the impact of coordinated enforcement.

A new Physical Activity Strategy is in development, with inclusive public health engagement underway.

Thriving Communities

Despite leadership transitions in the third sector, collaboration with Third Sector Leaders (TSL) remains strong. The UK Shared Prosperity Fund has supported 86 organisations through initiatives like Anchor Work and Community Networks. Community engagement remains active, with 76 new volunteering opportunities and 46 events hosted this quarter.

In this quarter, Kirklees Libraries have delivered inclusive, place-based services across 24 sites, supported by 400+ volunteers. Activities include rhyme time, arts and crafts, Talk English classes, and dementia-friendly sessions. Work has begun on relocating Dewsbury Library to the Walsh Building, with improved facilities and integrated services to support town regeneration.

Priority 4 – Local economic growth, working with regional and national partners

Investment & Place

The Kirklees Inclusive Economy Strategy (KIES) was formally approved at Council 16th July. It addresses the need for close collaboration with businesses and economic partners to identify growth, skills, and investment opportunities in Kirklees.

The Our Cultural Heart project is well underway, with progress on the food hall ongoing. Demolition of the old market hall is now complete and the distinctive paraboloid roof structures have been uncovered, and new glazing is being installed.

Progress is being made on the Dewsbury Blueprint projects with contractors on site at the Arcade, and a planned opening in the first half of 2026. The Market refurbishment and new Town Park obtained planning permission in June 2025. Work is on-going at Field House and the Civic Spaces project is underway and progressing well outside the Town Hall. The Bond Street improvements are complete.

Work is on-going to progress the Levelling up Funded project at Batley, public realm improvement plans in Cleckheaton and Heckmondwike, and tidy trader schemes to complement these plans. The Holmfirth Town Centre Access Plan works, with funding from West Yorkshire Combined Authority, are progressing well, focussing on improving accessibility, reducing congestion, enhancing pedestrian safety, and supporting sustainable travel in Holmfirth's town centre. The former Market Hall has been demolished, and improvements to the footways are well underway. Production of the Marsden Blueprint is underway, including consideration of the New Mills redevelopment.

Transport

The Kirklees Transport Strategy has been developed during 2024 and 2025, through close liaison with the West Yorkshire Combined Authority, neighbouring districts within and outside West Yorkshire and technical colleagues from across Kirklees. In a local consultation, we received responses from more than 2000 residents, businesses and local interested parties. Responses demonstrated majority support for the document's vision, objectives and policies. A detailed analysis of feedback was undertaken, and a final document is expected to be put to Cabinet for approval in September 2025.

On the Penistone Line Improvement Scheme, the Department for Transport have permitted we can drawdown up to £4.8M of Levelling Up Funding to deliver an Outline Business Case. The contract has been awarded to deliver before March 2026. On the Transpennine Route Upgrade, planning continues for the September rail disruptions, including planning for expected highways disruption.

Housing Growth

At Bradley Park, there has been continued progress on strategic acquisitions to improve access, with one property purchased, one progressing through contract discussions, and negotiations underway on a third. Dialogue with specialist legal advisors about progress on legal documents, including draft of development agreement, so that the project is ready to progress to procurement when access issues are resolved.

At Dewsbury Riverside, we continue to work with Homes England to progress the site including costs and viability work. Master developer procurement progressed; the preliminary market engagement document was published 11th July and we have already received several responses.

Council Performance Update – Quarter 1 2025/26

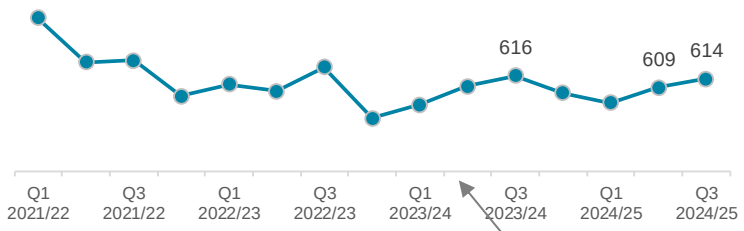
This section provides an update on progress against the Council's Key Measures. The Council's Key Measures provide insight into the performance of the council and demand on key council services. Below provides an example of how the information is presented and an explanation of what it means.

Example table, key and explanations

Benchmark key codes:

Demonstrates the performance/rate in Kirklees compared to the benchmark group. The colour of the shape demonstrates how the performance/rate in Kirklees compares to the benchmark group.

- = performance/rate in Kirklees is better than the benchmark group.
- = performance/rate in Kirklees is worse than the benchmark group.
- = performance/rate in Kirklees is the same as the benchmark group.

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Looked After Children	Demand	614 (Q3 2024/25)		**Increase** by 5 children compared with Q2 2024/25 **Decrease** by 2 children compared with Q3 2023/24	Kirklees - 61 Statistical Neighbours - 91 Children looked after rate per 10,000 children aged under 18 (2023/24)

Key Measure:

This is a description of what we are measuring.

Measure type:

What the measure is measuring - either performance or demand.

Latest value:

This shows the latest value that is available and indicates the period it covers. If the value is a percent the numerator and denominator will be provided in brackets.

Trend:

A line graph showing the data trend for the measure.

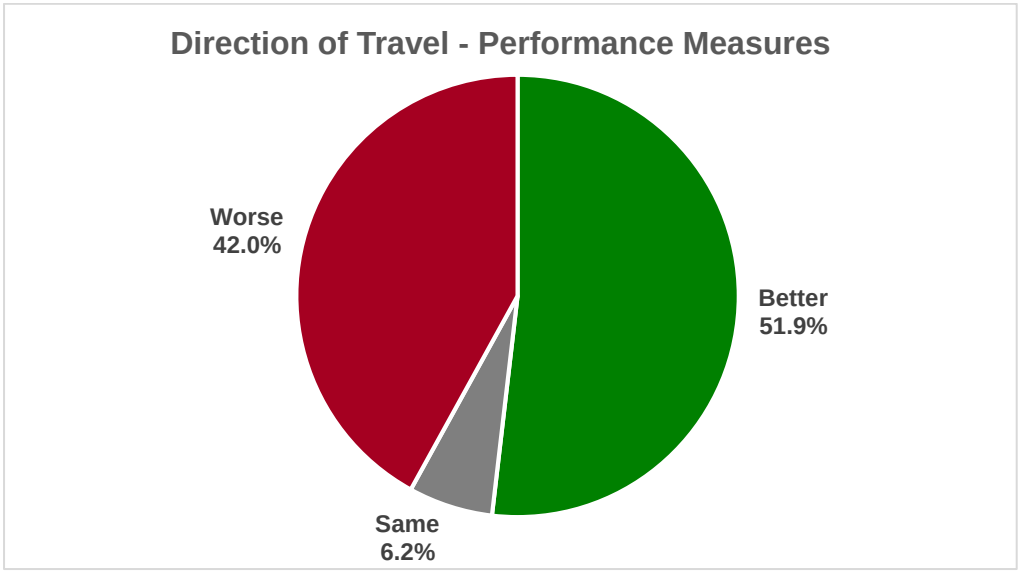
Latest value comparison:

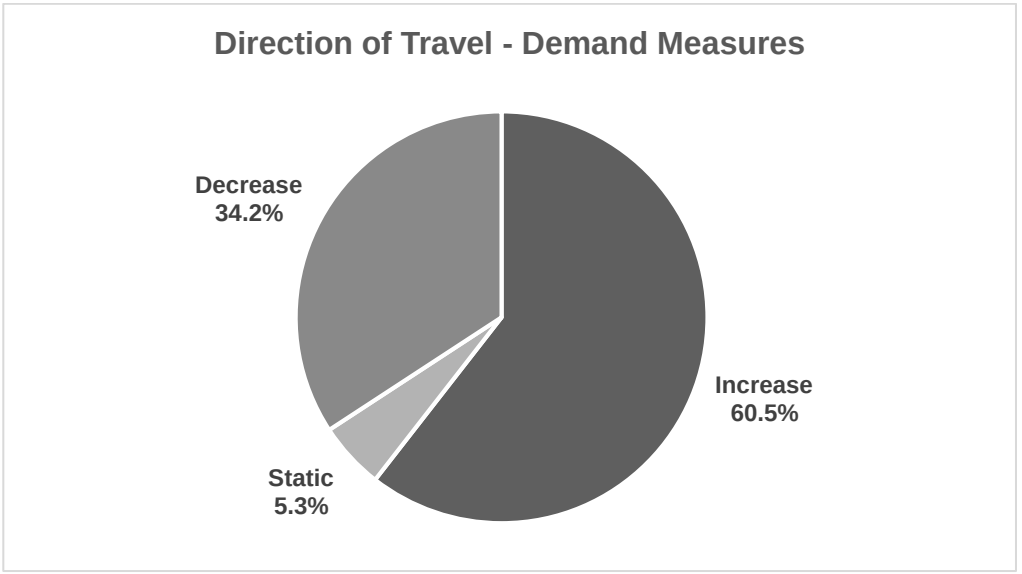
The latest value will be compared to 3-months ago (12-months for annual measures) and 12-months ago (24-months ago for annual measures), how the measures is performing and the difference.

- Performance measures will be Better, Same or Worse
- Demand measures will be Increase, Static or Decrease

Summary

The below charts summarise the direction of travel for measures reported in this section that have longer-term trend data available.





Adults and Health

Adults Social Care (ASC) Operation Key Measures

Quarter 1 2025/26

The number of people open to adult social care (all ages) has risen by 326 (6.5%) over the last 12 months. While the numbers are lower than the national average, the cause of the rise over the last 12 months is being investigated. Our approach to prevention is effective with less people coming through to services for formal care and support.

A priority of the Adult Social Care Change Programme is to reduce the number of younger people being placed into residential care and support them to live within their community, either with a package of care or a direct payment. We have seen a rise in residential, nursing and community placements (demand volume). Our numbers of younger people living in residential and nursing care remains high and further analysis will be completed on this cohort. We will continue to focus on how we support younger adults to live independently and how we plan for a smooth transition from children to adult services.

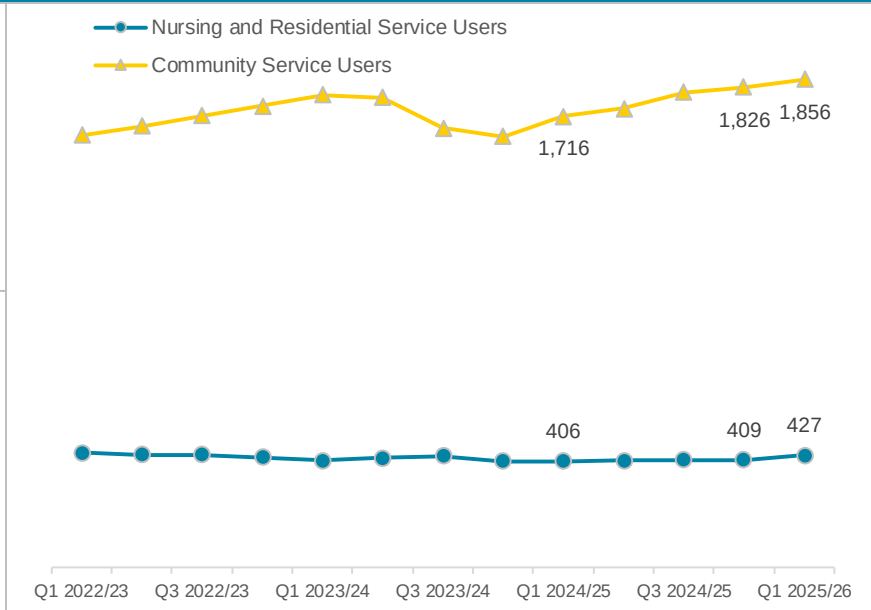
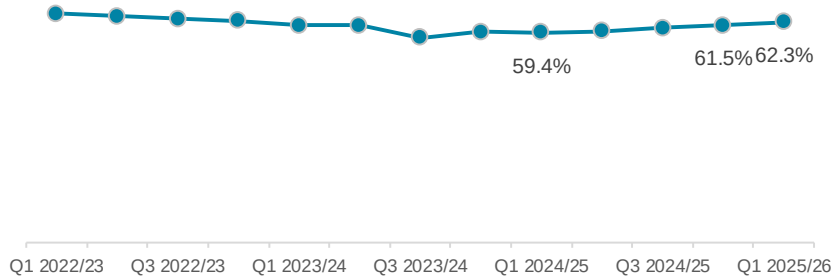
The numbers of older people (65+) living in residential care remains below the regional and national average which is a positive trend and supports our Home First approach both in the community and following a period in hospital. In the last quarter there has been an increase which we will closely monitor over the next quarter. The Adults Social Care Change programme is driving a change in practice which we expect to see reflected in performance.

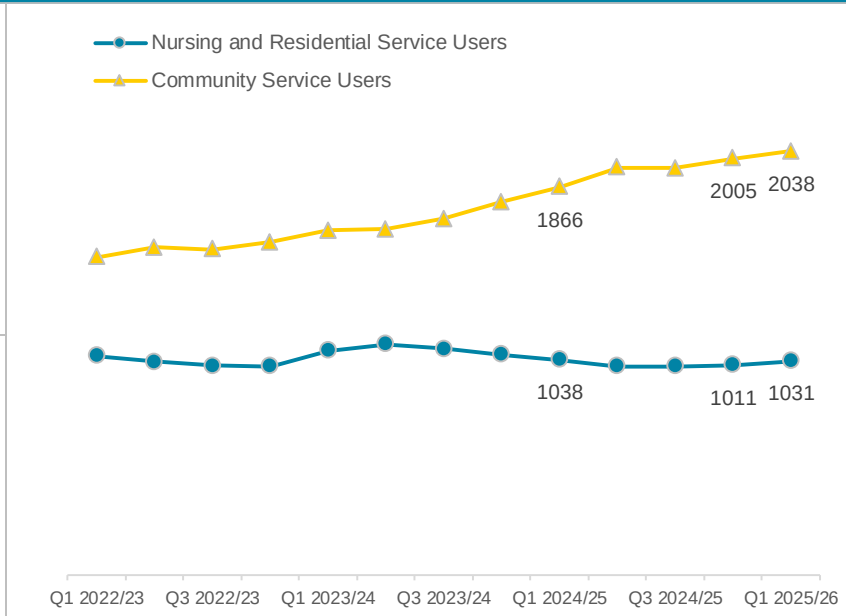
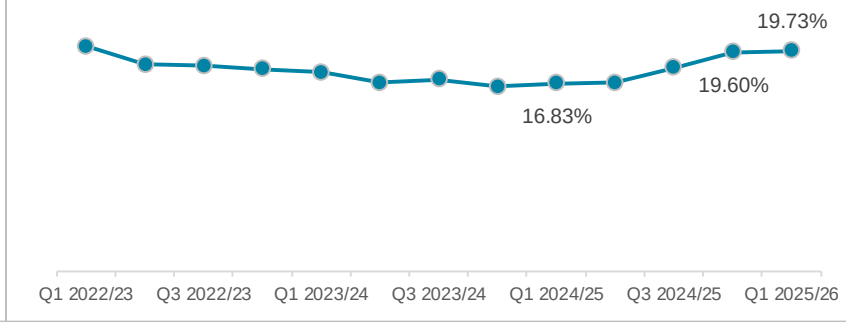
Reablement continues to play a pivotal role in supporting individuals to regain independence following a period of illness, injury, or hospital discharge. The reablement pathway has been successfully redesigned, enabling more people to benefit from short-term enabling support which maximises independence. Early data suggests that individuals who receive timely reablement support are significantly less likely to require long-term care packages. This aligns with our ambition to reduce dependency on formal services and promote independence. We anticipate including reablement outcome metrics in the next iteration of this report to bring more visibility to the impact of our approach to 'prevent, reduce and delay'.

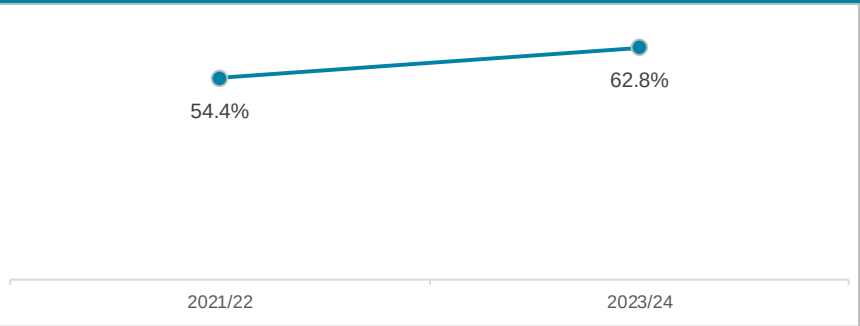
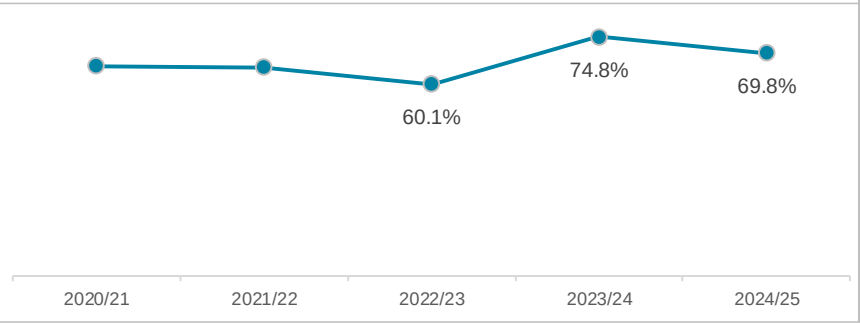
More people across all age groups are in receipt of a direct payment than the national average. This enables greater choice and control and independence. The spend on direct payments is significant and a focussed workstream on direct payments is part of the Adult Social Care Change Programme. While our ambition remains to promote the take up of direct payments, we need to ensure they continue to promote choice and are meeting people's needs effectively. In the next quarter, we expect our work on direct payments to show some changes in the data.

We have seen a positive trend from unpaid cares telling us they find it easy to find information about our services. While there has been a dip in the % of adult social care users who tell us they find it easy to find information, this remains higher than the national average (67.2%) and is overall on an increasing trend increasing from 60.1% in 2022/23.

Key Measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Community Service Users aged 18-64 (at period end)	Demand	1,856 (End of Q1 2025/26)		**Increase** by 30 users compared with the end of Q4 2024/25 **Increase** by 140 users compared with the end of Q1 2024/25	Kirklees - 645 National - 696 Number of Community Service users aged 18-64 per 18-64 100,000 population (Q4 2024/25)
Number of Nursing and Residential Service Users aged 18-64 (as at period end)	Demand	427 (End of Q1 2025/26)		**Increase** by 18 users compared with the end of Q4 2024/25 **Increase** by 21 users compared with the end of Q1 2024/25	Kirklees - 163 National - 109 Number of Nursing and Residential Service users aged 18-64 per 100,000 18-64 population (Q4 2024/25)
% of service users receiving a Direct Payment aged 18-64 (at period end)	Performance	62.3% (1,156 / 1,856) (End of Q1 2025/26)		**Better** by 0.8 percentage points compared with the end of Q4 2024/25 **Better** by 2.9 percentage points compared with the end of Q1 2024/25	Kirklees - 59.5 National - 38 % of Direct Payment service users aged 18-64 (Q4 2023/24)

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Community Service Users aged 65+ (at period end)	Demand	2,038 (End of Q1 2025/26)		**Increase** by 33 users compared with the end of Q4 2024/25 **Increase** by 172 users compared with the end of Q1 2024/25	Kirklees - 2,206 National - 2,283 Number of Community Service users aged 65+ per 100,000 65+ population (Q4 2024/25)
Number of Nursing and Residential Service Users aged 65+ (as at period end)	Demand	1,031 (End of Q1 2025/26)		**Increase** by 20 users compared with the end of Q4 2024/25 **Decrease** by 7 users compared with the end of Q1 2024/25	Kirklees - 1,259 National - 1,397 Number of Nursing and Residential Service users aged 65+ per 100,000 65+ population (Q4 2024/25)
% of service users receiving a Direct Payment aged 65+ (at period end)	Performance	19.73% (402 / 2,038) (End of Q1 2025/26)		**Better** by 0.13 percentage points compared with the end of Q4 2024/25 **Better** by 2.9 percentage points compared with the end of Q1 2024/25	Kirklees - 16.5 National - 14.8 % of Direct Payment service users aged 65+ (Q4 2023/24)

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
% of carers who found it easy to find information about ASC services*	Performance	62.8% (2023/24)		**Better** by 8.4 percentage points compared with 2021/22 No comparison data available for 2019/20	Kirklees - 62.8% Yorkshire and the Humber - 59.5% (2023/24)
% of adult social care users who found it easy to find information about ASC services**	Performance	69.8% (2024/25)		**Worse** by 5 percentage points compared with 2023/24 **Better** by 9.7 percentage points compared with 2022/23	Kirklees - 74.8% Yorkshire and the Humber - 67.9% (2023/24)

*Biennial collected measure, 2023/24 is the most up to date data available at the time of producing the report

**Annually collected measure, 2024/25 is the most up to date data available at the time of producing the report

Communities and Access Services Key Measures

Quarter 1 2025/26

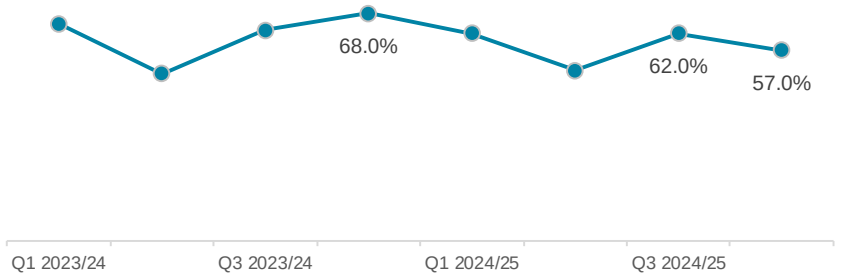
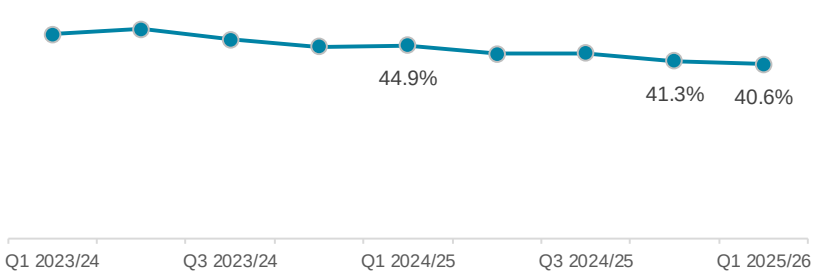
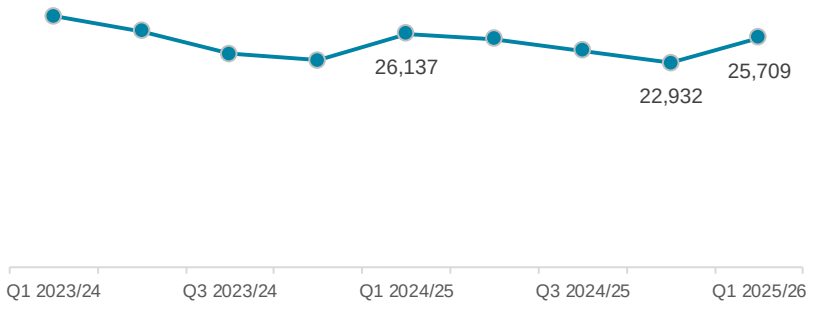
In Q4 2024/25, the Smoking Quit Verification Rate for the service was 57%, representing a decline of 5 percentage points from Q3 and 11 percentage points from Q4 2023/24. Despite this reduction, the service continues to perform well above both the national average (England only) and the Yorkshire and Humber regional average for CO validation rates, which stood at 11.42% and 15.71% respectively in Q3 2024/25. This strong performance is particularly notable given the significant increase in smoking referrals, which presents a challenge in maintaining a 60%+ validation rate. The service prioritises quality by ensuring CO validation at weeks 4 and 8 through drop-in sessions, thereby evidencing successful quits before continuing nicotine replacement therapy (NRT) prescriptions. This approach ensures value for money by funding NRT only for clients who have demonstrably quit. It is also recognised that clients who relapse are less likely to attend drop-in sessions to verify, and the service maintains its commitment to delivering quality by not solely relying on verbal confirmations. The verification mechanism also acts as a supportive measure to those people who want to quit smoking. The co-verification rate has decreased compared to the previous quarter. However, performance remains well above both the national and Yorkshire averages, which are currently below 20%. One contributing factor behind the reduction is the increase in referrals due to the launch of several targeted initiatives aimed at engaging nationally identified priority smoking groups, namely, people living in social housing, employees of large-scale businesses, and individuals with severe mental ill health. The targeted approach can be more difficult for the service to maintain consistent engagement, which may affect the ability to obtain verified quits, even when overall quit rates remain positive. Another contributing factor may be the reintroduction of the smoking cessation medication varenicline (Champix). Clients using this medication often prefer to stay in contact via telephone rather than attend in-person verification sessions, as their primary motivation is to access repeat prescriptions through their GP.

Anti-Social Behaviour (ASB) figures can be affected by seasonal changes or key international and national events so comparing each quarter needs to always be looked at with the same time frame on the previous year. In comparison to last quarter, total ASB incidents have increased but compared to the same period in 2024/25 ASB incidents have reduced. The ASB Partnership and Performance group for the district have enhanced the data set to keep in view ASB across the District and partnership performance. The group discussed these increases in relation to this quarter and trends show increases in personal ASB, youth nuisance, and vehicle-related ASB which are largely attributed to seasonal factors (e.g., warm weather). Longer term trends showed a reduction in most types of ASB. The Anti-Social Behaviour Partnership and Performance group for the district have developed an enhanced data set to keep in view anti-social behaviour data across Kirklees and the partnership, this is new and started in Q1. This quarter it focused on seasonal changes and impacts; this improved way of working enables data to be looked at district and ward level to support looking at how resources are targeted. The work of the Place Based Community Outcomes Groups keep ASB in view and responds at a place, ward and neighbourhood level. A revised ASB Action plan for the district will be developed during Q2, this will highlight what work partners already do and will be doing to prevent ASB and respond where there are issues and concerns working in partnership. Joint work across the district will continue, as well as in hot spot areas. Work will also be undertaken to increase awareness of and confidence in reporting ASB. This type of awareness raising work will also bring in to view other key topics that focus on keeping yourself, family

and friends safe which will also include developing further work in communities, linking in with Schools and faith and belief based organisations. Anti-social behaviour | Kirklees Council

Domestic Abuse Repeat Incidents have reduced by 0.7 % based on the previous quarter which is positive and looking back at the same quarter last year it has reduced by just over 4%. There is not a benchmark for repeat incidents, therefore we have used the benchmark which is based on incidents per population (not repeat incidents). Increase in reports of incidents can be seen as positive against a reduction in repeat incidents because it could be due to an increased awareness of domestic abuse and confidence to report. Partnership work took place during Q4 2024/25, Q1 2025/26 and Q2 2025/26 to raise awareness in communities across Kirklees of what Domestic Abuse is and the specialist services the Council makes available including the Kirklees Domestic Abuse Services outcome based commissioning contract. The Domestic Abuse Board have now developed their own data set that show in more detail the district and partnership performance to reduce repeat and any Domestic Abuse Incidents overall. Repeat Domestic Abuse Incidents reducing is positive and reflects the continuing developing partnership work that takes place with Police, Council Services, Health partners, Probation and essential specialist voluntary and community sector support services. There are Daily Risk Assessment meetings led by the Police and a Weekly Multi Agency Risk Conference led by the Councils Domestic Abuse Team, partners work together to have a coordinated plan to enhance the safety of higher risk victims of Domestic Abuse. During this Quarter there has been the continued development of the Kirklees Domestic Abuse Services Kirkless Domestic Abuse Specialist Services (KDASS) | Support for individuals experiencing domestic abuse | Kirklees, UK and Kirklees Community Champions Community Champions - Third Sector Leaders Kirklees. Kirklees Community Plus Service Community Plus | Kirklees Council continue to raised awareness about Domestic Abuse and support available as part of day-to-day working following work that took place in Q4 and the Safe and Together Training offer continues to be well accepted. Learning from Domestic Abuse Related Death Reviews continues to be shared and across Communities, Adults and Children's Safeguarding Boards. The work as outlined above will continue to be developed further and planning will commence for 16 Days of Action against Domestic Violence and violence against women and girls (VAWG) White Ribbon Campaign in November where we want to build on the good work that has taken place previously to increase awareness and work to ensure people affected know where they can access help and support.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Smoking Quit Verification Rate	Performance	57% (Q4 2024/25)		**Worse** by 5 percentage points compared with Q3 2024/25 **Worse** by 11 percentage points compared with Q4 2023/24	Kirklees - 62% Yorkshire and the Humber - 16% Smoking quits validation rate (Q3 2024/25)
% of repeat police reported domestic abuse incidents within 12 months	Performance	40.6% (1,103 / 2,716) (Q1 2025/26)		**Better** by 0.7 percentage points compared with Q4 2024/25 **Better** by 4.3 percentage points compared with Q1 2024/25	Kirklees - 26.1 Yorkshire and the Humber - 21.8 Domestic abuse rate per 1,000 population (01/10/24 - 30/09/25)
Number of Anti-Social Behaviour incidents - Reported to the police, Kirklees Homes & Neighbourhoods and Kirklees Environmental Services	Demand	25,709 (Q1 2025/26)		**Increase** by 2,777 incidents compared with Q4 2024/25 **Decrease** by 428 incidents compared with Q1 2024/25	Kirklees - 0.95 Yorkshire and the Humber - 1.25 Number of ASB incidents per 1,000 population aged over 16 (April 2025)

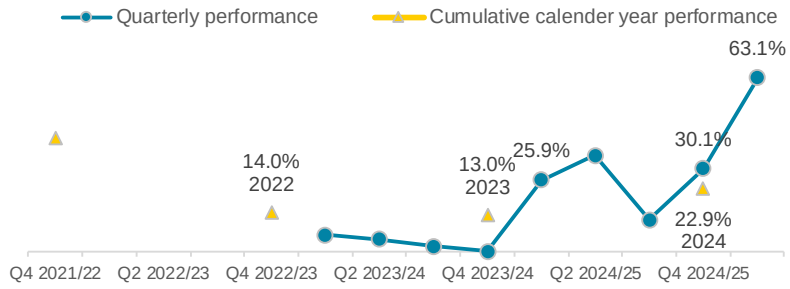
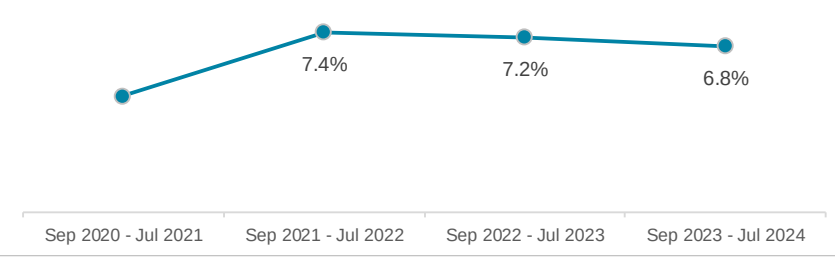
Children and Families

Learning & Early Support Key Measures

Quarter 1 2025/26

We are improving month on month in issuing initial Education, Health and Care Plans within the 20-week timeframe (from 30.1% in Q4 to 63.1% in Q1), and the quality of the plans is improving. In the last quarter, our in-month performance has exceeded the national average recently published in the 2024 calendar year SEN2 statutory return data (46.4%) in each of the three months. The new system we have in place for working on Education, Health and Care Plans is helping us to be clear, alongside our partners, about timeliness and how important that is to continue to improve. There are regular decision-making meetings that are underpinned by robust casework. Sufficiency of suitable learning places remains a challenge. We have more to do to improve our performance on Annual Reviews. We have seen an increase in Education Health and Care Needs Assessment requests being submitted in the last few months, this is a trend we see as schools break up for the summer period, therefore we will continue to have a focus on timeliness. We will continue to have a sharper focus on Annual Reviews in the Autumn term.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of Education, Health, and Care Plans finalised within 20 weeks during the quarter	Performance	63.06% (70 / 111) (Q1 2025/26)		**Better** by 33 percentage points compared with Q4 2024/25 **Better** by 37.2 percentage points compared with Q1 2024/25	Kirklees - 22.9% National - 46.4% Statistical neighbours - 42% % of EHCP issued within 20 weeks (excluding exceptions) (2024)
School attendance - Total school absence - (authorised and unauthorised)*	Performance	6.84% (3,998 / 58,419) (Sep 2023 - Jul 2024)		**Better** by 0.4 percentage points compared with Sep 2022 - Jul 2023 **Better** by 0.6 percentage points compared with Sep 2021 - Jul 2022	Kirklees - 7.1% National - 7.15% Total absence % (Q1 2024/25)

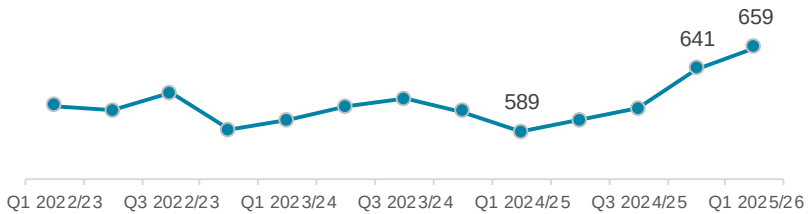
*Annually collected measure, most up to date data available at the time of producing the report

Child Protection & Family Support Key Measures

Quarter 1 2025/26

We have experienced a sustained increase in the numbers of looked after children in Kirklees after having seen a stable number of children in care across the previous 2 years. The main reason for the rise in the number of looked after children across the last 5 months, is several large sibling groups being taken into care. Children continue to exit care when it is appropriate to do so, and we continue to focus on ensuring children remain living with their family through a Special Guardian Order arrangement (SGO) which ensures children experience stability. As at March 31st 2024 Kirklees was the third lowest of the eleven statistical neighbours in terms of the numbers of looked after children and are the second highest in terms of the high numbers of SGO arrangements. The service will continue to ensure that when children enter care that we continue to focus on ensuring we provide them with loving and caring homes that allows them to thrive as we strive to achieve timely permanence arrangements for our children.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Looked After Children	Demand	659 (Q1 2025/26)		**Increase** by 18 children compared with Q4 2024/25 **Increase** by 70 children compared with Q1 2024/25	Kirklees - 61 Statistical Neighbours - 91 Children looked after rate per 10,000 children aged under 18 (2023/24)

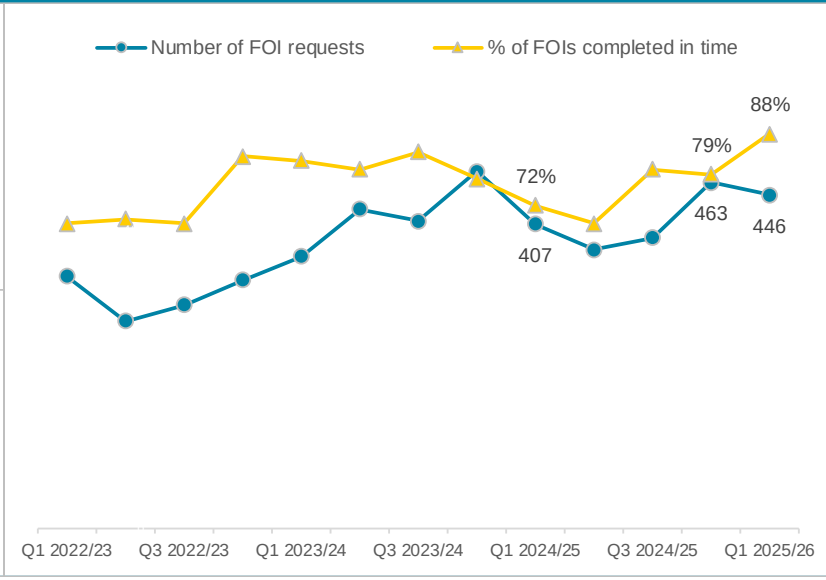
Public Health and Corporate Resources

Governance & Commissioning Key Measures

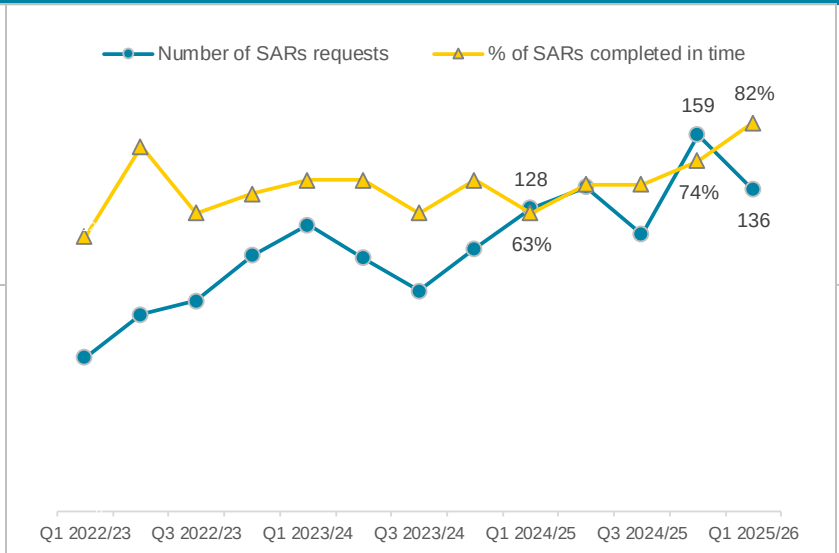
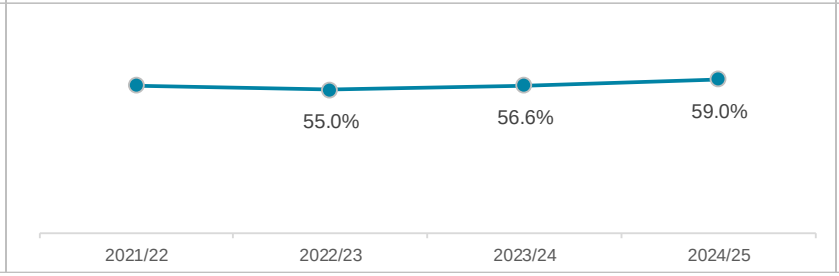
Quarter 1 2025/26

We have seen a slight decrease in the number of FOI and SAR requests made when compared with Quarter 4 2024/25. However, the number of requests received in Q1 2025/26 is higher than Q1 2024/25. The Information Governance Team began recording the number of questions being asked for each FOI request from Q1 2024/25 to further demonstrate the complexity of requests and the resource needed to respond to them. In contrast to the number of requests being received, we saw an increase in the number of questions compared to Quarter 4 2024/25, which highlights the complexity of some FOIs being made and the challenges with compliance rates. It is difficult to determine why there are greater number of requests being made at specific points throughout the year however, specific events or issues can impact this, for example contentious planning applications. The Team continues to manage the large SAR's backlog which has slightly increased in Quarter 1 and continue to liaise with the ICO regarding the approach to managing this. The Team will continue to review the SARs backlog to ensure requests are completed as soon as possible. Compliance figures for both FOIs and SARs are likely to remain similar to Quarter 4 2024/25. Due to the deadlines for responding to requests received during quarter 1 has not yet been reached, a precise compliance figure cannot be provided however, it's expected that there will be several overdue requests.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percent of Freedom of Information requests completed in time*	Performance	88% (299 / 341) (Q1 2025/26)		**Better** by 9 percentage points compared with Q4 2024/25 **Better** by 16 percentage points compared with Q1 2024/25	Kirklees - 75.3% Bradford - 92% Calderdale - 94% Leeds - 89.2% Wakefield - 99% (2024/25)
Number of Freedom of Information requests received	Demand	446 (Q1 2025/26)		**Decrease** by 17 requests compared with Q4 2024/25 **Increase** by 39 requests compared with Q1 2024/25	Kirklees - 3.69 Bradford - 3.36 Calderdale - 6.56 Leeds - 2.79 Wakefield - 3.89 Number of FOI requests per 1,000 population (2024/25)

*Based on the number of completed FOI's/SARs excluding any outstanding FOI's/SARs

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percent of Subject Access Requests completed in time*	Performance	82% (74 / 90) (Q1 2025/26)		**Better** by 8 percentage points compared with Q4 2024/25 **Better** by 19 percentage points compared with Q1 2024/25	Kirklees - 63% Bradford - 97% Calderdale - 97% Leeds - 86.2% Wakefield - 98% (2024/25)
Number of Subject Access Requests received	Demand	136 (Q1 2025/26)		**Decrease** by 23 requests compared with Q4 2024/25 **Increase** by 8 requests compared with Q1 2024/25	Kirklees - 1.22 Bradford - 0.44 Calderdale - 1.47 Leeds - 1.62 Wakefield - 1.25 Number of SAR requests per 1,000 population (2024/25)
% spend with local suppliers**	Performance	59% (£277.9M / £471.4M) (2024/25)		**Better** by 2.4 percentage points compared with 2023/24 **Better** by 4 percentage points compared with 2022/23	No benchmarking data is available

*Based on the number of completed FOI's/SARs excluding any outstanding FOI's/SARs

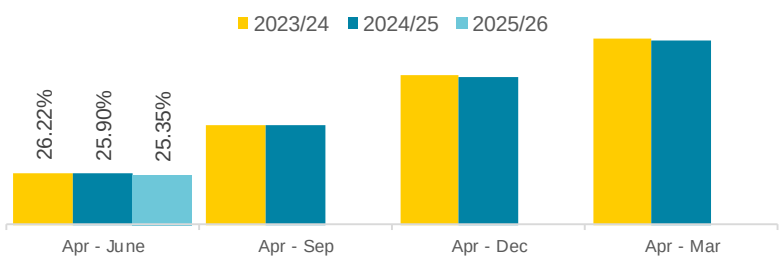
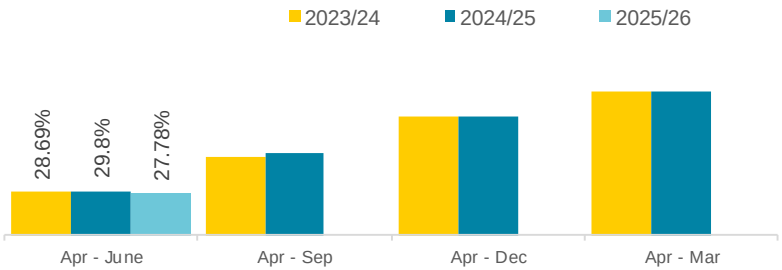
**Annually collected measures, no data available for Q1 2025/26

Finance Key Measures

Quarter 1 2025/26

Quarter 1 comparisons of Council Tax and Business Rates collections show a reduction of collection compared to previous years. Collection is being closely monitored as we explore this and understand what actions we can take to improve our collection rates. Residents may still be feeling cost of living pressures, and we are using our teams to direct support and advice including available discounts and exemptions and Council Tax Reduction.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Council Tax collection rate*	Performance	25.35% (£78.2M / £308.3M) (Apr 2025 - Jun 2025)		**Worse** by 0.55 percentage points compared with Apr 2024 - Jun 2024 **Worse** by 0.87 percentage points compared with Apr 2023 - Jun 2023	Kirklees - 94.1% Statistical Neighbours - 95.1% Council Tax in-year collection rate (April 2024 to March 2025)
Business Rates collection rate*	Performance	27.78% (£31.3M / £112.6M) (Apr 2025 - Jun 2025)		**Worse** by 2.01 percentage points compared with Apr 2024 - Jun 2024 **Worse** by 0.91 percentage points compared with Apr 2023 - Jun 2023	Kirklees - 96.17% Statistical Neighbours - 96.71% Business rates in-year collection rate (April 2024 to March 2025)

*Cumulative measures, comparisons are with previous 12 months and previous 24 months.

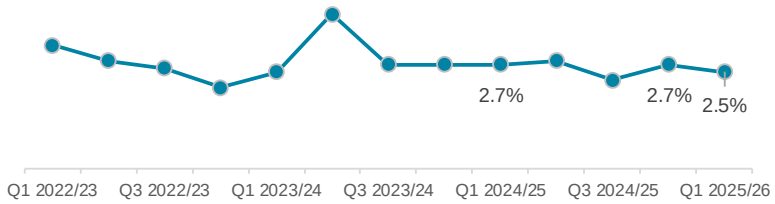
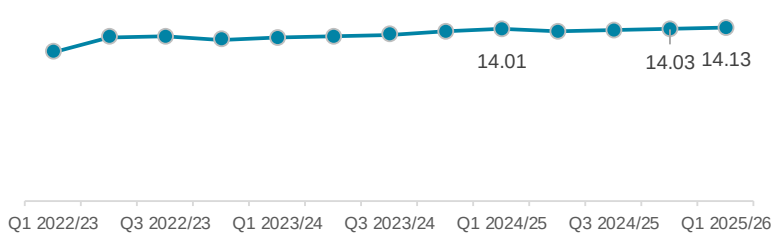
People Services Key Measures

Quarter 1 2025/26

There has been a slight increase in the sickness absence rate in Quarter 1 2025/26 based on the sickness absence rate over the previous 12 months (July 2024 to June 2025). This is not unexpected and reflects national trends. The office for National statistics is reporting continued high levels of absence compared to pre-pandemic levels. The council attendance team transitioned to employee healthcare on 1st April 2025 with the purpose of embedding a more consistent and robust attendance management approach across all directorates. Over the next quarter there will be a renewed focus on individual sickness absence case management that should result in person centred interventions. Best practice is now shared across the attendance team and the closer relationship between Occupational health and HR staff will deliver benefits. We will also be refreshing the return-to-work documents, which will have a positive impact on intermittent absences. Although the sickness absence rate is still slightly increasing the cost of sickness is reducing by £410,762 less than Q4 2024/25 and £7,503 than Q1 2024/25.

Staff turnover remains stable and in line with seasonal trends. The data shows turnover has improved slightly with a slight decrease in turnover rates compared with both Quarter 4 2024/25 and Quarter 1 2024/25. The improvement in turnover rate is slight and is unlikely to be attributable to any specific initiatives. Wider labour market and economic factors will also contribute to this measure. High turnover is to be expected in the Council linked to service changes. Employee voice groups and active communication of messages from the 'Our Conversation' staff survey are planned for Quarter 2 and 3. Employee engagement will support maximising retention. Exit surveys will also be revised to align with the employee survey themes.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Staff turnover (percentage of staff leaving the Council, excluding internal movement)	Performance	2.5% (197 / 7,783) (Q1 2025/26)		**Better** by 0.2 percentage points compared with Q4 2024/25 **Better** by 0.2 percentage points compared with Q1 2024/25	Kirklees - 2.7%* Bradford - 2.9% Leeds - 1.6% Wakefield - 2.4% Turnover rate (Q3 2023/24)
Average sickness days per full time equivalent (FTE) over the last 12 months	Performance	14.13 (Q1 2025/26)		**Worse** by 0.1 days per FTE compared with Q4 2024/25 **Worse** by 0.12 days per FTE compared with Q1 2024/25	Kirklees - 13.9* Bradford - 13.22 Leeds - 12.93 2023/24

*Currently this is the most up to date benchmarking data available, work is underway to obtain updated data which will be available in Quarter 2 2025/26

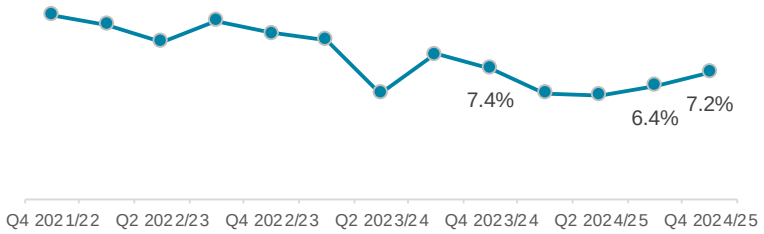
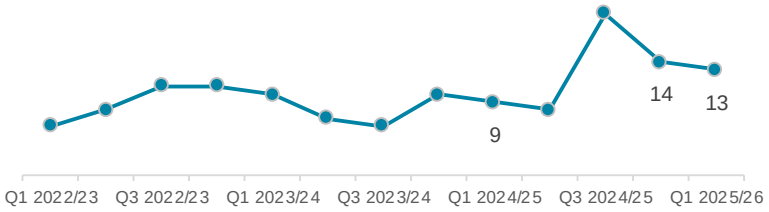
Public Health & Health Protection Key Measures

Quarter 1 2025/26

Rates of smoking during pregnancy in Kirklees demonstrate a long-term declining trend and are currently significantly lower than at the beginning of 2021/22. This drop in maternal smoking rates follows the introduction of a new national model of stop-smoking support for pregnant women in 2022 as part of the NHS Long Term Plan. However, data for 2024/25 shows a more recent upward trend in local maternal smoking rates. Smoking rates differ across the two NHS Trusts in Kirklees, and although the underlying issues driving recent upward trends in some areas of Kirklees place are unclear, provisional data suggests the recent upward trend where rates have been highest will not continue in Q1 2025/26. Public Health will conduct a more in-depth analysis of smoking and broader maternity data, working collaboratively with the maternity system to identify any underlying issues which can be considered in our strategic approach to continue to support this population of focus.

The number of RIDDOR (Reporting of Injuries, Diseases and Dangerous Occurrences Regulations) reportable incidents (13 in Q1) is similar to the previous quarter (14 in Q4). Next quarter, there will be a reduction in RIDDORs from schools due to summer school holidays. Work to improve performance includes: Ongoing communications via the intranet and news items on Kirklees Business Solutions to reinforce the need for incidents to be added to the accident/reporting system in a timely manner to ensure RIDDORs are submitted to the Health and Safety Executive (HSE) within stipulated timescales; Further discussion at the next Health and Safety Oversight Board meeting in November to cascade the information via the Board minutes to all Heads of Service; Communication with managers to ensure that safe systems of work are adhered to and the Institution of Occupational Safety and Health (IOSH) approved, mandatory health and safety training and in-house training is provided for all relevant staff.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Smoking during pregnancy (mother's smoking status at time of delivery)*	Performance	7.2% (65 / 909) (Q4 2024/25)		**Worse** by 0.8 percentage points compared with Q3 2024/25 **Better** by 0.2 percentage points compared with Q4 2023/24	Kirklees - 6.3% National - 5.1% Smoking during pregnancy (Q4 2024/25)
Number of RIDDOR reportable incidents	Performance	13 (Q1 2025/26)		**Better** by 1 incidents compared with Q4 2024/25 **Worse** by 4 incidents compared with Q1 2024/25	Kirklees - 187 National - 214 Rate of total reported non-fatal injury per 100,000 employees (2023/24)

*Trend data comes from local NHS Trust maternity datasets; benchmark data comes from nationally reported data

Place

Skills & Regeneration Key Measures

Quarter 1 2025/26

Employment rates are based on the Annual Population Survey, which covers the whole population. While the data shows general trends, it can fluctuate due to sample size limitations and doesn't directly reflect the impact of specific Council programmes aimed at helping people into or stay in work. Employment rates have continued to rise steadily since 2022, reflecting recovery post-pandemic. The Council's employment support programmes are increasingly focused on helping economically inactive residents, in line with national policy. Overall, progress is positive, but challenges remain in engaging those furthest from the labour market. The current upward trend is expected to continue into Q1 2025/26. However, recent changes to National Insurance and the National Minimum Wage may impact employer behaviour, potentially leading to fewer vacancies and more redundancies. Looking ahead, Council programmes will continue to support residents, with a growing focus on those who are economically inactive and furthest from the labour market.

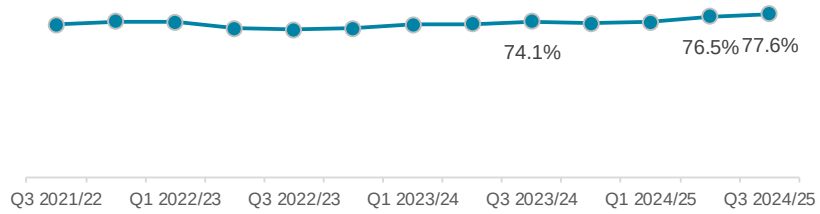
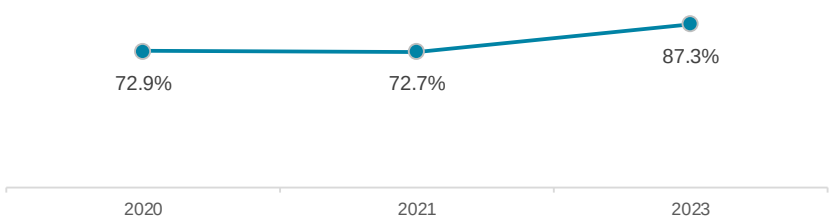
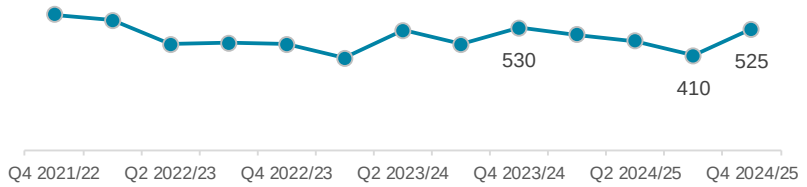
The qualification indicator, also drawn from the Annual Population Survey, shows the proportion of residents with a Level 2 qualification. Like employment data, it reflects whole-population trends and is subject to sampling variation. It doesn't directly measure the outcomes of Council programmes supporting adult learning or skills progression. For qualifications, the latest data (Q3 2024/25) shows a continued rise in Level 2 attainment. This reflects both post-16 resits in English and Maths and increased adult education participation. Overall, progress is consistent and encouraging. The upward trend in qualifications is expected to continue, supported by post-16 resits and adult learning. Looking ahead, the Council and Kirklees College will continue to advocate for sustained and increased funding for adult and community learning, including both accredited and non-accredited courses, to widen access and support progression.

The Business births measure uses national data from the Government's Business Demography dataset and reflects overall business start-up activity in the area. It does not isolate the effect of Council-led initiatives to support new business creation, but it gives a useful picture of local entrepreneurial activity. Q4 2024/25 saw 525 new business starts, the highest since Q4 2023/24, indicating strong entrepreneurial activity. The Council's 'Start-Up Gateway' and specialist programmes like 'Business for Good' continue to support residents in launching new ventures. Overall, business start-up rates are encouraging. The positive trend in new business starts is expected to continue. Economic shifts, including potential redundancies, often lead more residents to consider self-employment. Looking ahead, the Council will maintain support through the Start-Up Gateway and specialist programmes, while exploring ways to improve long-term business survival and growth.

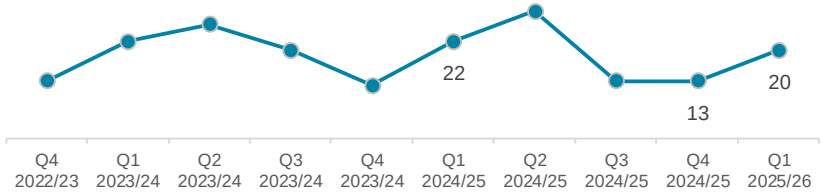
In terms of planning applications, there is still steady interest in housing development across the Borough. However, progress is being held back by a shortage of new allocated sites and challenges in bringing forward remaining sites in the Local Plan. Wider economic uncertainty is also affecting developer confidence, especially for brownfield sites in marginal viability areas. Planning activity remains steady, but housing delivery is below target. This is due to limited new site allocations and viability issues with remaining Local Plan sites. National planning reforms and potential Grey Belt opportunities may stimulate future activity. Challenges such as site availability, developer confidence, and economic conditions are key barriers to meeting housing targets. Housing delivery remains below target, largely due to complex sites and reliance on

external funding and private sector partners. National planning reforms and Grey Belt opportunities may help unlock new development. Looking ahead, the Council will continue to engage with developers and partners to bring forward challenging sites and encourage investment in priority areas.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Employment Rate*	Performance	77.6% (212,300 / 273,700) (Q3 2024/25)		**Better** by 1.1 percentage points compared with Q2 2024/25 **Better** by 4 percentage points compared with Q3 2023/24	Kirklees - 77.6% Yorkshire and the Humber - 73.8% (Jan - Dec 24)
Percent of population with at least level 2 qualification***	Performance	87.3% (236,000 / 269,500) (2023)		**Better** by 87.3 percentage points compared with 2022 **Better** by 14.6 percentage points compared with 2021	Kirklees - 87.3% Yorkshire and the Humber - 85.1% (2023)
Business births**	Performance	525 (Q4 2024/25)		**Better** by 115 businesses compared with Q3 2024/25 **Worse** by 5 businesses compared with Q4 2023/24	Kirklees - 14.8 West Yorkshire - 14.5 Business births per 10,000 people aged 16+ (Jan-Mar '25)

*Data taken from national dataset so there is a 6-month lag, most up to date data available is for the period Jan to Dec 2024
**Data taken from national datasets, there is a 3-month lag, most up to date data available is for Jan to Mar 2025
***Annual measure most up to date data provided is for 2023.

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of planning applications received - major	Demand	20 (Q1 2025/26)		**Increase** by 7 applications compared with Q4 2024/25 **Decrease** by 2 application compared with Q1 2024/25	◆ Kirklees - 0.4 Yorkshire and the Humber - 0.4 Number of major planning application decisions per 1,000 properties (Apr 24 - Mar 25)

Highways, Streetscene and Waste Key Measures

Quarter 1 2025/26

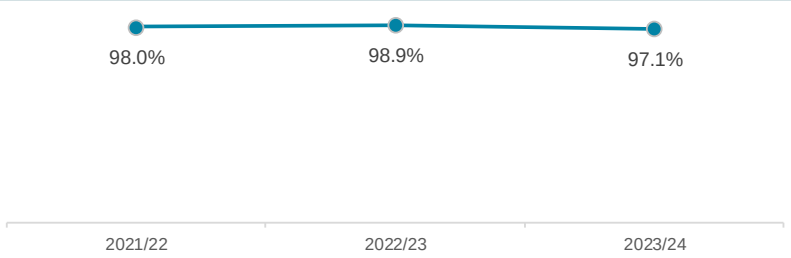
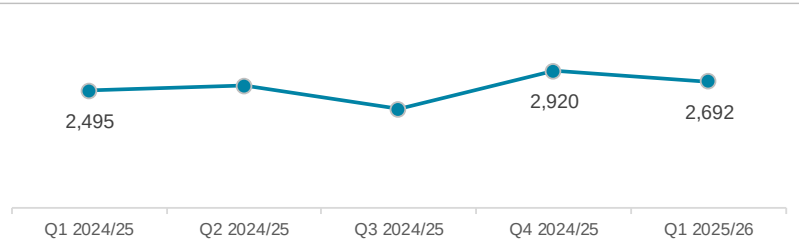
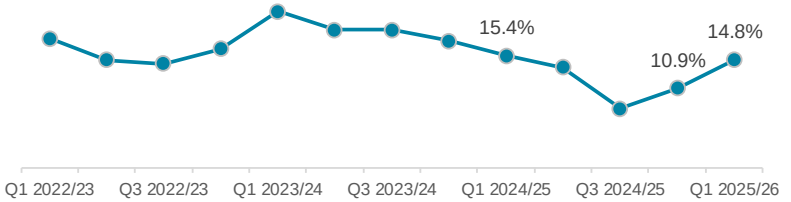
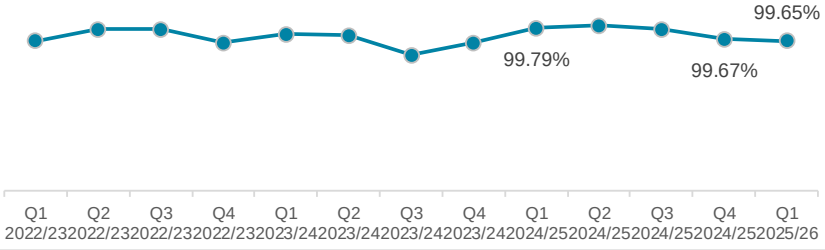
Through its engagement with the Department for Transport's Local Highways Maintenance Transparency initiative, the Highways Service has strengthened its position to deliver improvements across Kirklees' extensive road network. This enhanced support enables a more proactive approach to reducing emergency defects and contributes to a safer, more resilient infrastructure for all road users.

Fly Tipping continues to increase in line with national trends and has become more of a public and political concern, with a backlog of more than 1,400 reports and wait times of up to 12 weeks. Our Greenspace Action Team has been operating with several vacancies over previous quarters but has now recruited an additional 3 Enforcement Officers and 3 Rangers, which will create additional capacity to tackle fly tips. The service is also securing 4 agency Rangers in the short term to aim to reduce the backlog of work to a manageable level and improve response times. The service will be procuring Keep Britain Tidy to develop a new Fly Tipping and Litter Strategy, which will benchmark existing services and be coproduced with Councillors and Community Groups. It is anticipated to be finalised in January 2026 for adoption. Nationally, DEFRA continues to develop the digital tracking of waste for 2026.

Collections without complaint (missed bins) performance has remained lower than previous quarters, and the service target. The main driver to performance in Missed Bins, and the delay in recovery to pre Q4 levels, was the prolonged breakdown of our specialist collection vehicle, which is the only one available within the entire fleet. This meant the round had to be performed with vehicles that either did not have the capacity to complete the entire route or could not access all areas. The service has launched new rounds for the South of the district, to replicate the area based working model that is already established in the north. This will create ownership of an area by a single crew and allow for improved performance management of issues that occur. An additional hire vehicle has been procured to create more resilience for the specialist round. In addition, the business case to direct award the procurement of new, narrow track refuse collection vehicles has been signed off by our Legal, Audit and Procurement teams, and is now progressing directly with the manufacturer. This will eventually reduce the reliance of the service on hire vehicles and create more resilience across the fleet for narrow access routes.

Contamination has continued to increase following the spike caused by prolonged inclement weather in the previous quarter. Our recycling advisor teams have been working in targeted areas to recover the position on contamination follow the spike in the previous quarter, which is seeing a positive impact. A programme of improvement continues to create a more comprehensive service level agreement, and with it a data set and dashboard reporting tool. This will aid the service, residents and Councillors in understanding what can be expected and how performance measures against this. It will also focus on providing real time information to manage enquiries. The focus of this work will be on Waste Collection and Fly Tipping.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
% of emergency defects made safe within intervention timescales*	Performance	97.14% (2023/24)		**Worse** by 1.7 percentage points compared with 2022/23 **Worse** by 0.8 percentage points compared with 2021/22	Kirklees - 97.1% Statistical Neighbours - 89.3% Percentage of emergency defects (Cat 1, Priority 1) made safe within target time (2023/24)
Number of fly tipping incidents	Demand	2,692 (Q1 2025/26)		**Decrease** by 228 incidents compared with Q4 2024/25 **Increase** by 197 incidents compared with Q1 2024/25	Kirklees - 18.8 Yorkshire and the Humber - 15.3 Fly-tipping incidents reported per 1,000 people (2023/24)
Recycling rejected due to contamination	Performance	14.8% (601.1 / 4072.26) (Q1 2025/26)		**Worse** by 3.9 percentage points compared with Q4 2024/25 **Better** by 0.6 percentage points compared with Q1 2024/25	Kirklees - N/A National - 16.6% % of contaminants in recycling+ (2024)
Collections without complaint (missed bins)	Performance	99.65% (2,494,546 / 2,503,232) (Q1 2025/26)		**Worse** by 0.02 percentage points compared with Q4 2024/25 **Worse** by 0.14 percentage points compared with Q1 2024/25	Kirklees - N/A National - 85.69 Missed collection per 100,000 collections++ (2022/23)

*Annually collected measure, most up to date data available. This relates to all defects, whilst predominantly potholes this will also include damaged guardrail, knocked over street furniture, etc
+% of contaminants in recycling benchmarking data sourced from WRAP – tackling contamination in dry recycling practical guide
++Missed collections per 100,000 collections data sourced from APSE, this is the most up to date data available

Homes & Neighbourhoods Key Measures

Quarter 1 2025/26

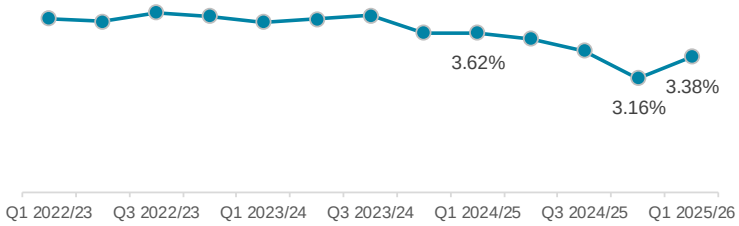
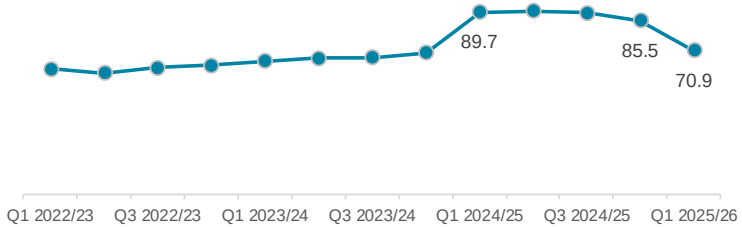
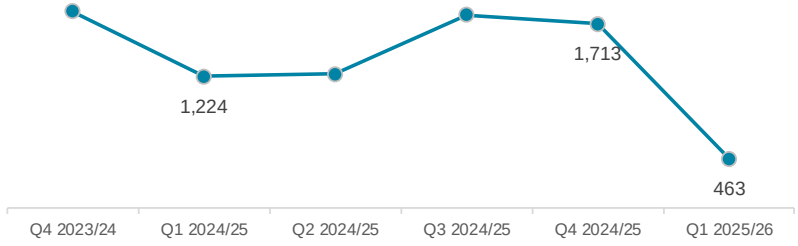
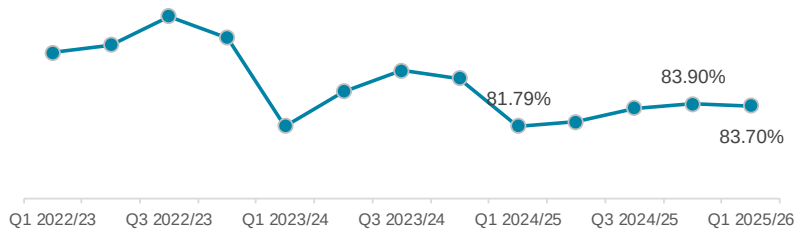
There has been a slight increase in the percentage of rents in arrears, from 3.2% in Q4 2024/25 to 3.4% in Q1 2025/25. The current Tenant Arrears Recovery Team has experienced escalating resource pressures which we are addressing in order to build on the improvements previously made in 2024/25. Our income management performance continues to benchmark favourably against that of similar sized social housing providers. Our overall percentage rent collection for Q1 2024/25 is 99.06%. Three full time Income Management Team Housing Officers are currently assisting with the recovery of tenancy arrears. The officers are contacting current tenants who are in rent arrears. They will review customers' financial circumstances, seek repayment of arrears, agree affordable repayment arrangements, help to maximise customer income and benefit take up, offer advice and support, and refer customers to appropriate support services. The assistance from the three officers will increase the team resource recovering debt from current tenants, increase contact levels and support available to customers, increase collection of rent, and decrease total arrears levels.

There has been an improvement in the average days to re-let times, from 85.5 days in Q4 2024/25 to 70.9 days in 2025/26. Although improving, re-let times remain higher than acceptable; the national benchmark for this process is 36.3 days. The total number of empty units is 425 which is a reduction from 490 in 24-25 Q4. The Voids Management Team within Property Services is reviewing the Surveying and Repairs Teams' capacity, performance and processes, alongside linked processes within the Housing Management Allocations and Lettings teams, and the council's wider Housing Solutions and Accessible Homes teams. Targets are being set for the total number of empty properties, along with a standard re-let KPI.

There has been a significant reduction in the number of open damp, mould and condensation (DMC) cases, from 1,713 in Q4 2024/25 to 463 in Q1 2025/26. DMC policy and procedure are now embedded, and the Property Services Team has the required resource to act on reports of DMC cases in a timely manner, this has allowed us to rectify DMC issues and complete all backlog cases. We are now working on a business-as-usual number of DMC cases, and the average time taken to address issues is reducing. We are preparing for the introduction of Awaab's Law in October 2025, which will require us to investigate and carry out DMC and other emergency repairs within fixed timescales.

There has been a slight decrease in the proportion of non-emergency responsive repairs completed within timescale, from 83.9% in Q4 2024/25 to 83.7% in Q1 2025/26. We are still experiencing high levels of responsive repair requests due to the age of our stock and the lack of investment in capital and cyclical works. We have been working with residents to confirm and prioritise emergency repairs and carry out the works for these within required timescales. The percentage of responsive repairs classed as emergency is currently 28.1%; these must be prioritised over non-emergency responsive repairs. Our proportion of non-emergency repairs completed within timescales compares favourably to the national benchmark of 81.5%. Service improvements are ongoing in Repairs and Maintenance. We have been working on reducing the number of overall repairs in diaries, which will assist us in completing future non-emergency repairs within required timescales. Targets have been set to reduce the turnaround over the next few months.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of rents in arrears.	Performance	3.38% (£3,225,133 / £95,372,563) (Q1 2025/26)		**Worse** by 0.22 percentage points compared with Q4 2024/25 **Better** by 0.24 percentage points compared with Q1 2024/25	Kirklees - 3.6% National - 3.6% Current tenant arrears % (2023/24)
Average days to re-let time.	Performance	70.9 (Q1 2025/26)		**Better** by 14.6 days compared with Q4 2024/25 **Better** by 18.8 days compared with Q1 2024/25	Kirklees - 69.73 National - 36.31 (2023/24)
Number of open damp, mould and condensation cases	Demand	463 (Q1 2025/26)		**Decrease** by 1250 cases compared with Q4 2024/25 **Decrease** by 761 cases compared with Q1 2024/25	Kirklees - 6.48%* National - 3.7% Damp and mould live cases as a % of stock (2023/24)
Proportion of non-emergency responsive repairs completed within timescale.	Performance	83.7% (11,709 / 13,993) (Q1 2025/26)		**Worse** by 0.2 percentage points compared with Q4 2024/25 **Better** by 1.91 percentage points compared with Q1 2024/25	Kirklees - 86.3% National - 81.5% % of non-emergency repairs completed within target timescale (2023/24)

*Benchmark figure based on Q4 2024/25, historic data is not available

Development Key Measures

Quarter 1 2025/26

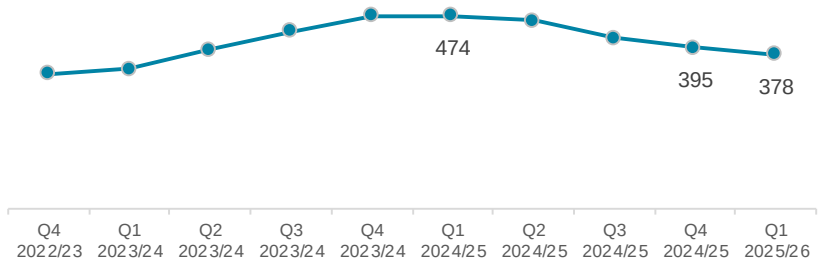
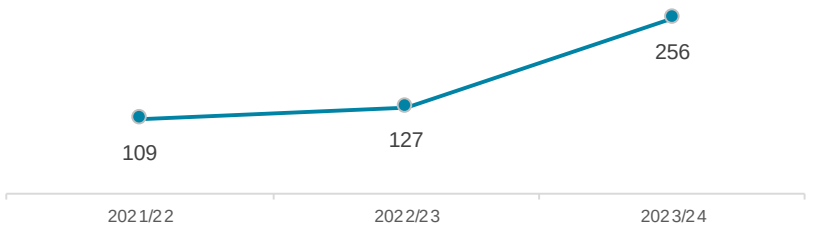
Over the past year, the service has made significant strides in transforming its approach to homelessness and temporary accommodation (TA), delivering tangible improvements for some of our most vulnerable residents. Following the launch of our transformation programme in summer 2024, we have seen a sustained and meaningful reduction in both the overall number of households in temporary accommodation and the use of bed and breakfast (B&B) placements, this has continued into Q1 2025/26 with a reduction of 17 households on Q4 2024/25 and 96 on Q1 2024/25. At the peak in June 2024, 474 households were in temporary accommodation, including 230 in B&Bs. By the end of June 2025, these figures have fallen to 378 and 134 respectively, representing a 20% overall reduction in temporary accommodation and a 41.7% drop in B&B use.

This progress reflects a coordinated effort across services, including strengthened partnerships with private landlords, supported housing providers, and housing associations. We've expanded leasing options, piloted tenancy rescue schemes, and improved early intervention pathways to prevent homelessness before crisis point. The progress is meaningful and indicates we are on track to reduce families in bed and breakfast and the cost of temporary accommodation overall.

The introduction of new capacity at our temporary accommodation site will be a key enabler. By repurposing 24 additional units for families this will reduce reliance on B&Bs but will also unlock potential annual savings of up to £1.3 to £1.6 million, depending on occupancy and subsidy recovery. Soft market testing for further temporary provision will be due back for analysis.

Supply of new affordable housing remains a challenge, but colleagues continue to bring forward opportunities for affordable, social and specialist accommodation. Housing growth team are starting to look with planning colleagues about the opportunities to address the supply of affordable and social properties.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of households in temporary accommodation.	Demand	378 (Q1 2025/26)		**Decrease** by 17 households compared with Q4 2024/25 **Decrease** by 96 households compared with Q1 2024/25	Kirklees - 2.21 Bradford - 2.14 Calderdale - 0.92 Leeds - 1.62 Wakefield - 1.65 Number of households in temporary accommodation per 1,000 households (Q3 2024/25)
Gross Affordable Housing Completions*	Performance	256 (2023/24)		**Better** by 129 home delivered compared with 2022/23 **Better** by 147 homes delivered compared with 2021/22	No benchmarking data is available

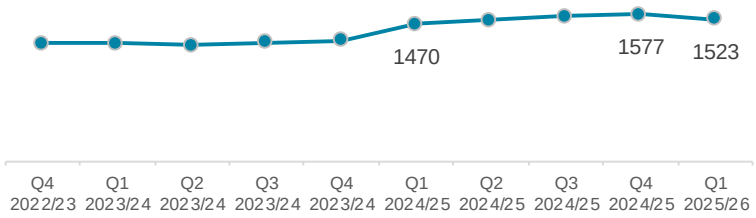
*2023/24 figure provided in December 2024, 2024/25 figure will be provided later in 2025.

Environment Strategy & Climate Change Key Measures

Quarter 1 2025/26

The trend of a general increase in the number of children accessing SEND home to school transport is increasing year on year. This is a trend we have been seeing for several years and is a national situation, linked to the increasing number of children accessing Education Health and Care Plans (EHCPs). There may be slight quarter by quarter changes, but the year-on-year changes and long-term trends are the more important. Q1 2025/26 showed a small dip in numbers however, this being over a short time space it should not be seen as indicating a trend.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of children accessing home to school transport	Demand	1,523 (End of Q1 2025/26)		**Decrease** by 54 children compared with the end of Q4 2024/25 **Increase** by 53 children compared with the end of Q1 2024/25	DfT are looking at collecting data nationally next year

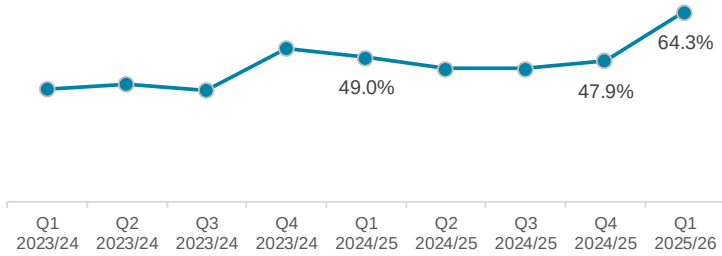
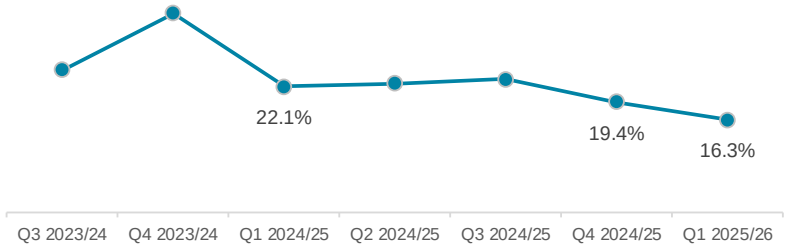
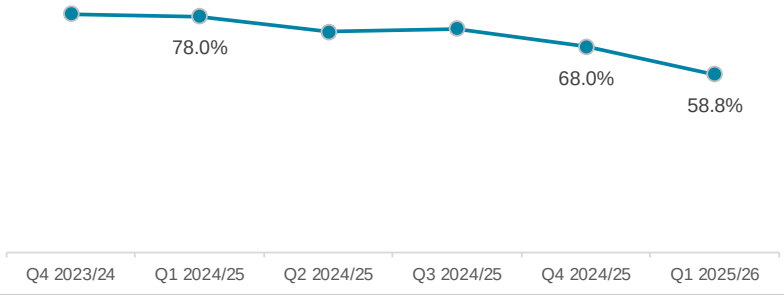
** Prior to 2024/25 personal travel budgets (PTBs) and mileage were always an option to parents but were not the main focus of the service. The main focus was providing physical transport, and the vast majority of children were transported in taxi's / mini-buses, and therefore data on PTBs and mileage was limited and was never put forward as part of reporting, the service merely reported on the number of children on physical transport.

The focus of the service has now changed to offering a personal travel budget instead of physical transport through the introduction of enhanced personal travel budget offer and post-16 transport statement introduction of default offer of personal travel budget as opposed to physical transport. This has resulted in changes to reporting metrics to include more granular detail surround personal travel budgets, mileage and physical transport. Current systems do not allow to report on historic data, something which is being addresses.

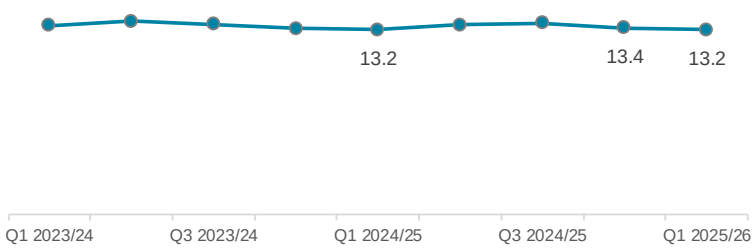
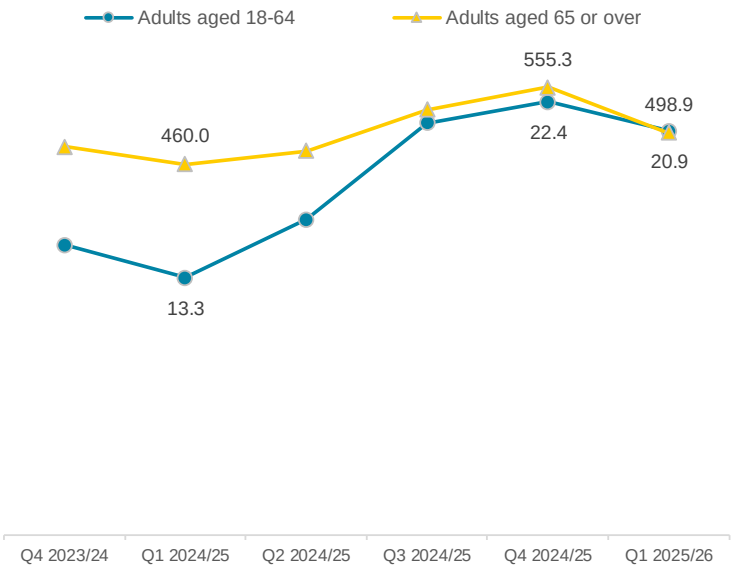
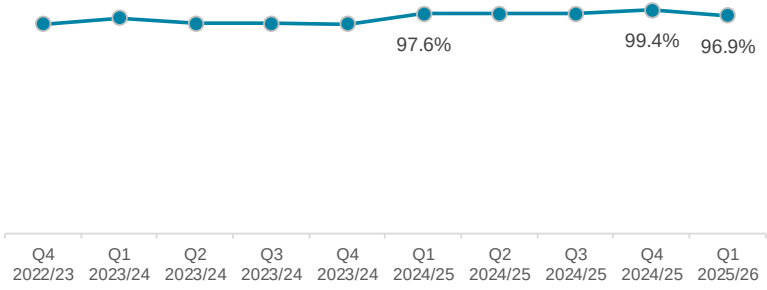
Appendix A – Council Measures

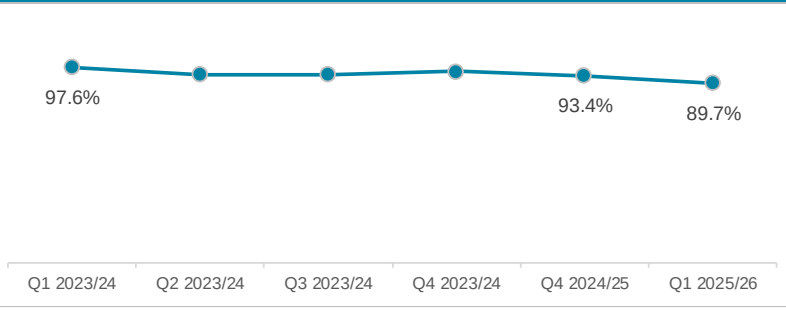
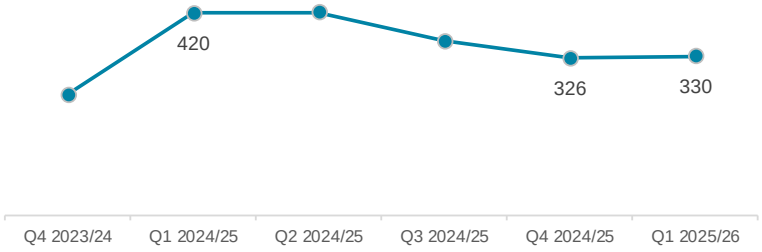
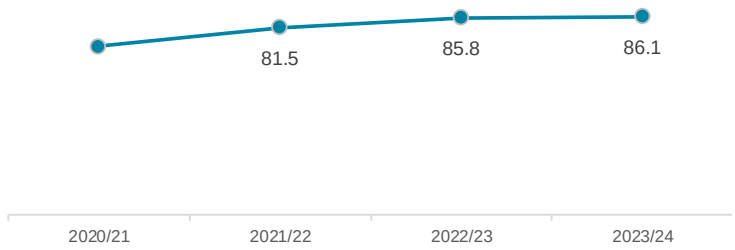
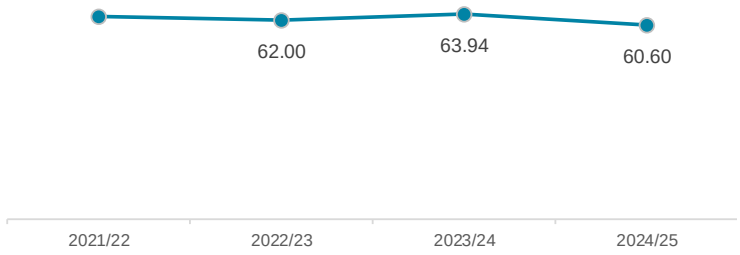
Adults and Health

Adults Social Care (ASC) Operation Measures

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
% Contacts to ASC that were signposted, information, advice or guidance was given or had no further action	Performance	64.3% (Q1 2025/26)		**Better** by 16.37 percentage points compared with Q4 2024/25 **Better** by 15.3 percentage points compared with Q1 2024/25	No benchmarking data is available
% Contacts to ASC that progress to an Assessment	Performance	16.3% (Q1 2025/26)		**Better** by 3.1 percentage points compared with Q4 2024/25 **Better** by 5.8 percentage points compared with Q1 2024/25	No benchmarking data is available
% Care Act Assessments that progressed to a long term service	Performance	58.8% (Q1 2025/26)		**Worse** by 9.2 percentage points compared with Q4 2024/25 **Worse** by 19.2 percentage points compared with Q1 2024/25	No benchmarking data is available

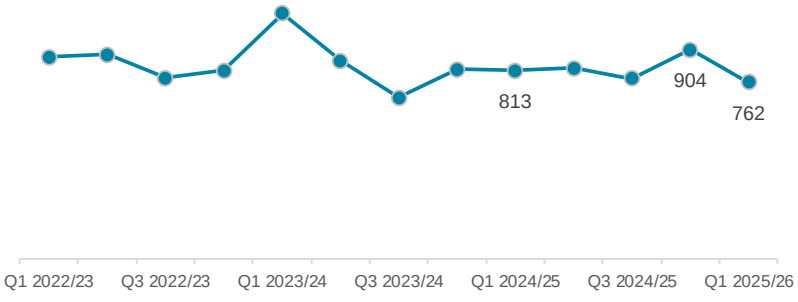
*Annually collected measure, most up to date data available at the time of producing the report
**Biennially collected Measure, most up to date data available at the time of producing the report

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Average commissioned home care hours per user.	Demand	13.20 (End of Q1 2025/26)		**Decrease** by 0.15 hours per user compared with the end of Q4 2024/25 **Static** by 0 hours per user compared with the end of Q1 2024/25	Kirklees - 13.5 National - 14.4 (2023/24)
Permanent admissions to residential care per 100,000 population for adults aged 18-64	Demand	20.9 (End of Q1 2025/26)		**Decrease** by a rate of 2 user compared with the end of Q4 2024/25 **Increase** by 7.6 hours compared with the end of Q1 2024/25	Kirklees - 17.5 National - 15.2 (2023/24)
Permanent admissions to residential care per 100,000 population for adults aged 65 or over.	Demand	498.9 (End of Q1 2025/26)		**Decrease** by a rate of 56 users compared with the end of Q4 2024/25 **Increase** by 38.9 hours compared with the end of Q1 2024/25	Kirklees - 457.5 National - 566 (2023/24)
% s42 safeguarding enquiries where the risk was reduced or removed.	Performance	96.9% (313 / 323) (Q1 2025/26)		**Worse** by 2.5 percentage points compared with Q4 2024/25 **Worse** by 0.7 percentage points compared with Q1 2024/25	Kirklees - 93.2% National - 90.9% (2023/24)

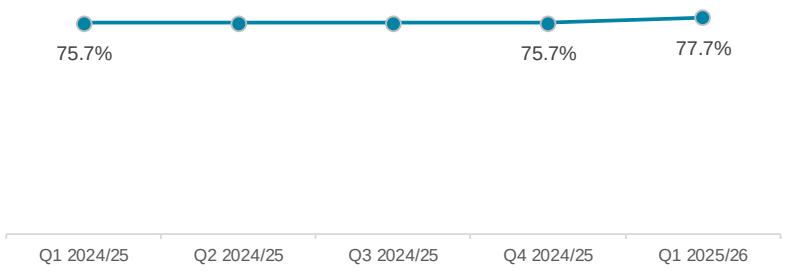
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
% S42 safeguarding enquiries where making safeguarding personal outcomes were met.	Performance	89.7% (Q1 2025/26)		**Worse** by 3.7 percentage points compared with Q4 2024/25 No comparison data available for Q1 2024/25	Kirklees - 95.4% National - 94.2% (2023/24)
Number of people waiting for an ASC assessment	Performance	330 (End of Q1 2025/26)		**Worse** by 4 people compared with the end of Q4 2024/25 **Better** by 90 people compared with the end of Q1 2024/25	Benchmarking data not publically available
The outcome of short-term services: sequel to service – this relates to those people accessing short term support (reablement etc) and the percentage of those people that go on to have no long term support with ASC.*	Performance	86.1 (2023/24)		**Better** by 0.3 percentage points compared with 2022/23 **Better** by 4.6 percentage points compared with 2021/22	Kirklees - 86.1 National - 79.4 (2023/24)
Survey measures - Overall satisfaction of people who use services with their care and support*	Performance	60.6 (2024/25)		**Worse** by 3.3 percentage points compared with 2023/24 **Worse** by 1.4 percentage points compared with 2022/23	Kirklees - 63.9 National - 65.4 (2022/23)

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Carers of people in ASC quality of life (assess the overall quality of life of carers who support individuals with adult's social care needs) **	Performance	7.2 (2023/24)		**Worse** by 0.3 compared with 2021/22 No comparison data available for 2019/20	Kirklees - 7.2 National - 7.3 (2023/24)

Communities and Access Services Measures

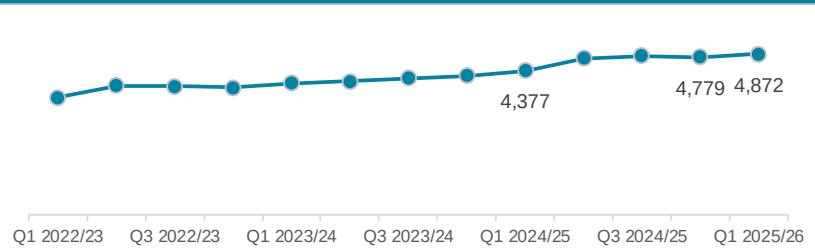
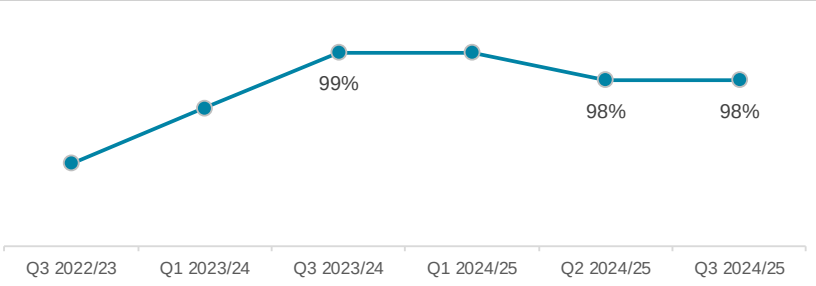
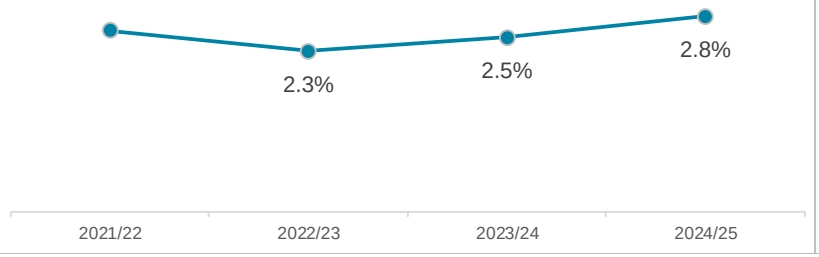
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Total number of referrals to Wellness Service	Demand	762 (Q1 2025/26)		**Decrease** by 142 compared with Q4 2024/25 **Decrease** by 51 compared with Q1 2024/25	No benchmarking data is available

Integrated Commissioning Measures

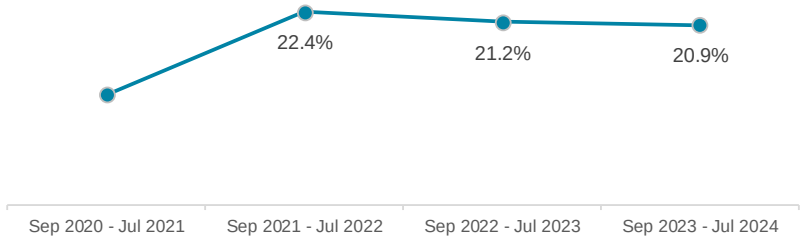
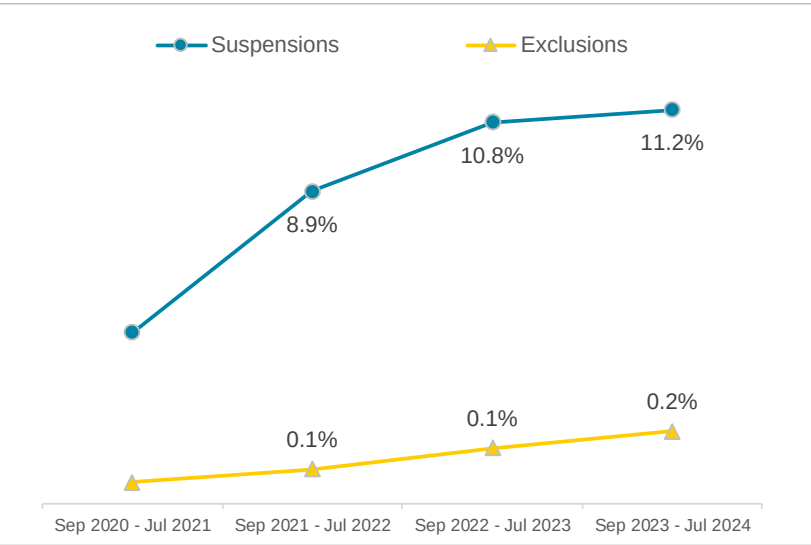
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
% Kirklees ASC providers judged as good or outstanding by CQC	Performance	77.7% (146 / 188) (End of Q1 2025/26)		**Better** by 2 percentage points compared with the end of Q4 2024/25 **Better** by 2 percentage points compared with the end of Q1 2024/25	Kirklees - 77.7% National - 86.5% (Q1 2025/26)

Children and Families

Learning & Early Support Measures

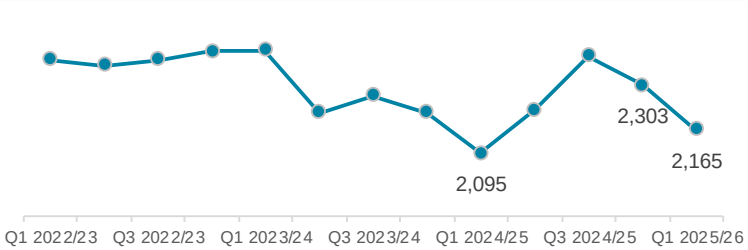
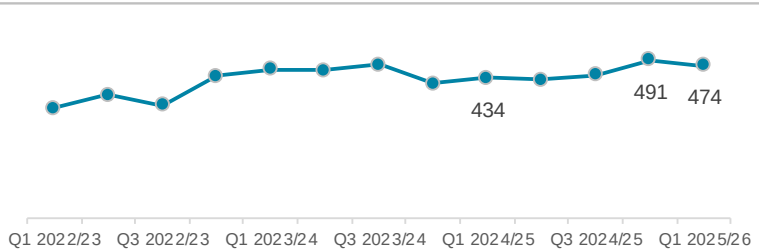
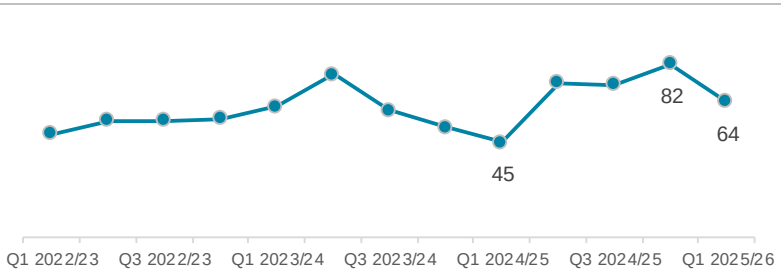
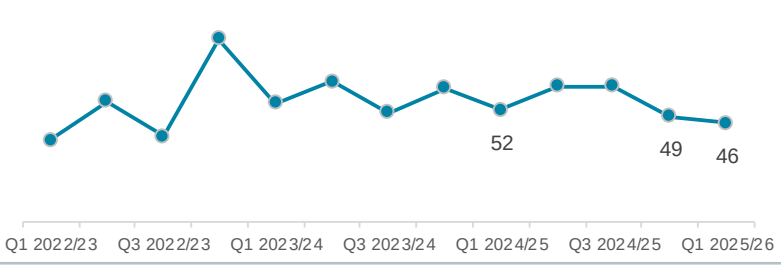
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Education, Health, and Care Plans	Demand	4,872 (Q1 2025/26)		**Increase** by 93 EHC plans compared with Q4 2024/25 **Increase** by 495 EHC plans compared with Q1 2024/25	Kirklees - 4.8% Statistical Neighbours - 5.5% % of pupils with statement of SEN or EHC Plans (2024)
Percentage of inspected Early Years providers rated Good or better by Ofsted*	Performance	98% (276 / 281) (Q3 2024/25)		**Same** by 0 percentage points compared with Q2 2024/25 **Worse** by 1 percentage point compared with Q3 2023/24	Kirklees - 98% National - 98% Percentage of inspected Early Years providers rated Good or better by Ofsted (Q3 2024/25)
Not in Education, Employment or Training - % of 16-17 year olds that are not in education, employment or training**	Performance	2.8% (2024/25)		**Worse** by 0.3 percentage points compared with 2023/24 **Worse** by 0.5 percentage points compared with 2022/23	Kirklees - 2.8% Statistical Neighbours - 4% (2023/24)

*Most up to date data available, only published 2 or 3 times a year
**Annual measures, most up to date data available.

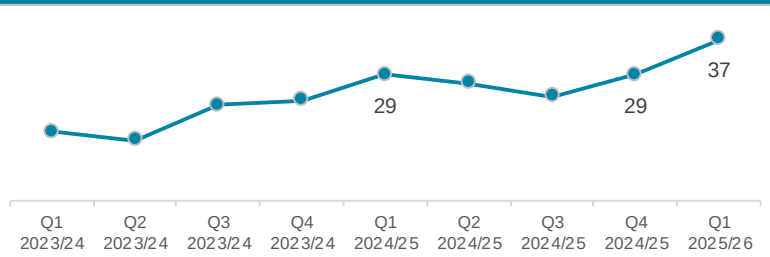
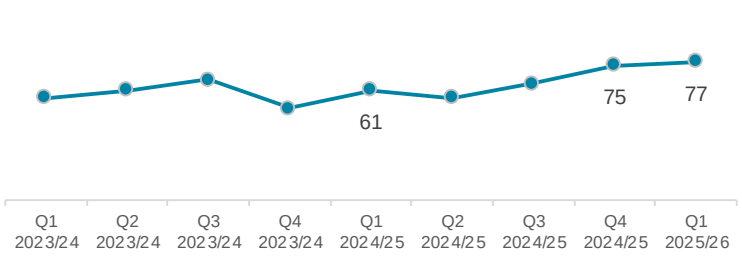
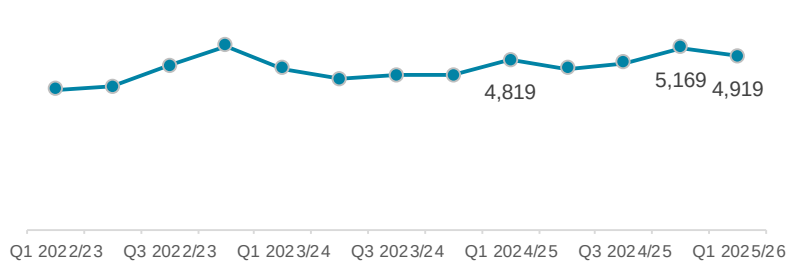
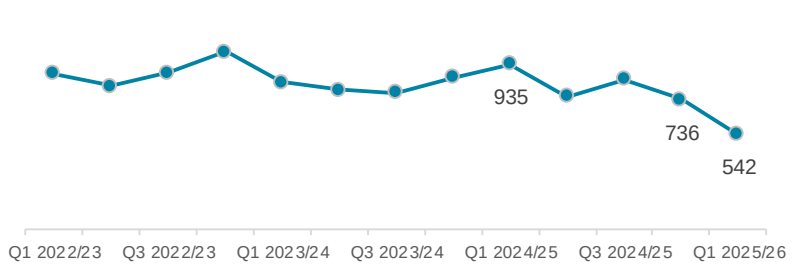
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of pupils who are persistently absent (attendance below 90%) from school*	Performance	20.9% (Sep 2023 - Jul 2024)		**Better** by 0.3 percentage points compared with 2022/23 academic year **Better** by 1.5 percentage points compared with 2021/22 academic year	Kirklees - 20.21% Statistical Neighbours - 20.85% (2023/24 academic year)
Suspensions - Number of all school suspensions expressed as a % of school population*	Performance	11.16% (7,634 / 68,426) (Sep 2023 - Jul 2024)		**Worse** by 0.35 percentage points compared with the 2022/23 academic year **Worse** by 2.31 percentage points compared with the 2021/22 academic year	Kirklees - 10.98% National - 9.33% Suspensions - Number of all school suspensions expressed as a % of school population (Q1 2023/24)
Exclusions - Total Permanent Exclusions from Schools as a % of the school population*	Performance	0.17% (114 / 68,426) (Sep 2023 - Jul 2024)		**Worse** by 0.04 percentage points compared with the 2022/23 academic year **Worse** by 0.09 percentage points compared with the 2021/22 academic year	Kirklees - 0.13% National - 0.11% Permanent Exclusions rate (Q1 2023/24)

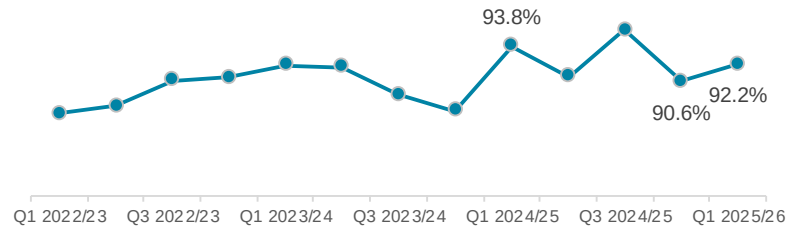
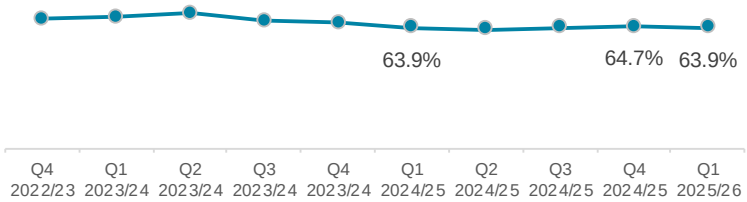
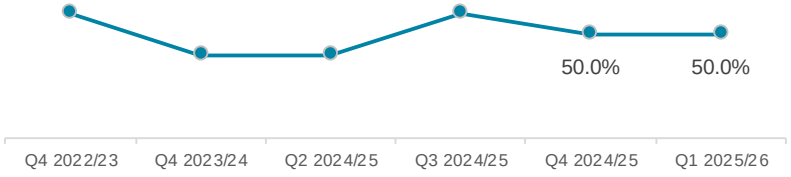
*Annual measures, most up to date data available at time of producing the report

Child Protection & Family Support Measures

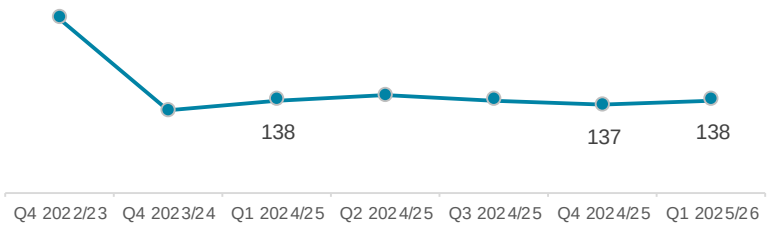
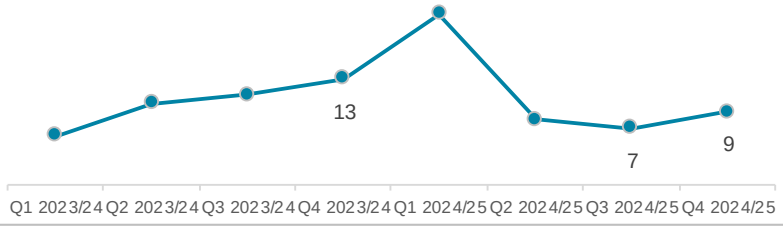
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Children in Need	Demand	2,165 (Q1 2025/26)		**Decrease** by 138 children compared with Q4 2024/25 **Increase** by 70 children compared with Q1 2024/25	Kirklees - 220.9 Statistical Neighbours - 364.28 Children in Need rate per 10,000 (2023/24)
Number of children with a Child Protection Plan	Demand	474 (Q1 2025/26)		**Decrease** by 17 children compared with Q4 2024/25 **Increase** by 40 children compared with Q1 2024/25	Kirklees - 42.8 Statistical Neighbours - 43.08 Children who are the subject of a CPP - rate per 10,000 (2023/24)
Number of children and young people starting to be looked after in the quarter	Demand	64 (Q1 2025/26)		**Decrease** by 18 children compared with Q4 2024/25 **Increase** by 19 children compared with Q1 2024/25	Kirklees - 25 Statistical Neighbours - 28.6 Rate of children starting to be looked after each year (2023/24)
Number of Children Looked After ceasing to be looked after in the quarter	Demand	46 (Q1 2025/26)		**Decrease** by 3 children compared with Q4 2024/25 **Decrease** by 6 children comapred with Q1 2024/25	Kirklees - 24 Statistical Neighbours - 29.8 Rate of children ceasing to be looked after each year (2023/24)

*A new care home was added during quarter 4 2024/25 which altered both the denominator and numerator

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Children Looked After in an external residential provision	Demand	37 (Q1 2025/26)		**Increase** by 8 children compared with Q4 2024/25 **Increase** by 8 children compared with Q1 2024/25	No benchmarking data is available
Number of Children Looked After aged 16-18 in semi supported accommodation external residential provision	Demand	77 (Q1 2025/26)		**Increase** by 2 children compared with Q4 2024/25 **Increase** by 16 children compared with Q1 2024/25	No benchmarking data is available
Number of contacts to children's services	Demand	4,919 (Q1 2025/26)		**Decrease** by 250 contacts compared with Q4 2024/25 **Increase** by 100 contacts compared with Q1 2024/25	No benchmarking data is available
Number of referrals to children's social care	Demand	542 (Q1 2025/26)		**Decrease** by 194 referrals compared with Q4 2024/25 **Decrease** by 393 referrals compared with Q1 2024/25	Kirklees - 331.1 Statistical Neighbours - 525.79 Rate per 10,000 of referrals to Children's Social Services (2023/24)

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of Care Leavers in suitable accommodation	Performance	92.2% (318 / 345) (Q1 2025/26)		**Better** by 1.6 percentage points compared with Q4 2024/25 **Worse** by 1.6 percentage points compared with Q1 2024/25	Kirklees - 92% Statistical Neighbours - 89.8% % in suitable accommodation (Q4 2023/24)
Percentage of Care leavers in Employment, Education or Training (of those available for EET)	Performance	63.9% (Q1 2025/26)		**Worse** by 0.8 percentage points compared with Q4 2024/25 **Same** by 0 percentage points compared with Q1 2024/25	No benchmarking data available this is a locally specified measure
Percentage of Children's Homes rated Good or better by Ofsted*	Performance	50% (3 / 6) (Q1 2025/26)		**Same** by 0 percentage points compared with Q4 2024/25 No comparison available for Q1 2024/25	No benchmarking data is available

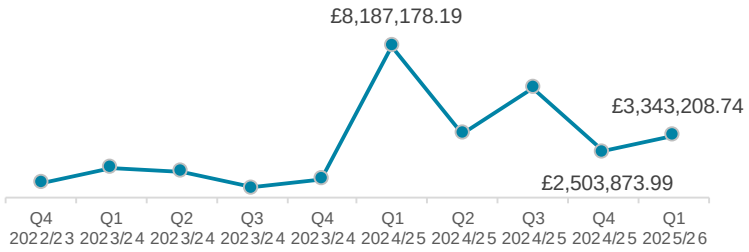
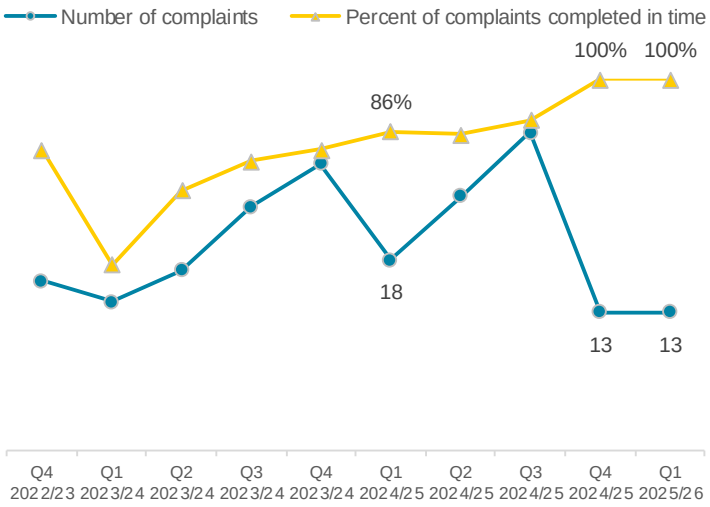
Resources, Improvement & Partnerships Measures

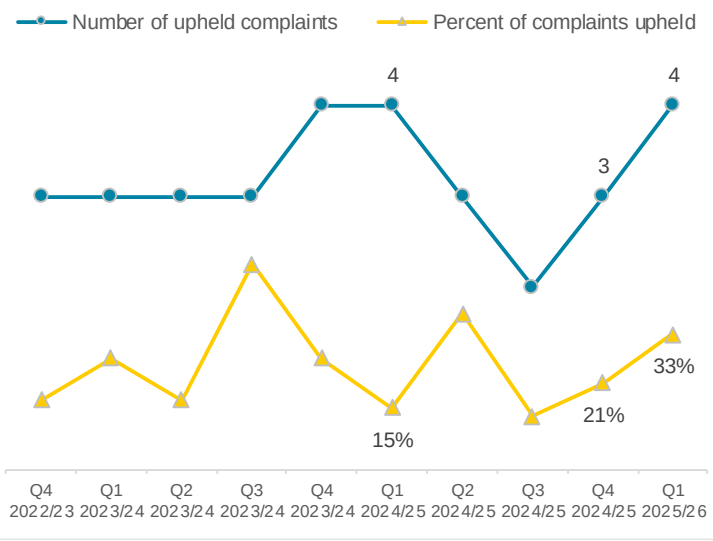
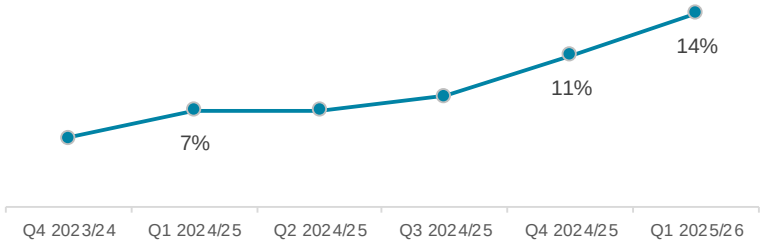
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of mainstream foster carer households in Kirklees	Demand	138 (Q1 2025/26)		**Increase** by 1 household compared with Q4 2024/25 **Static** by 0 household compared with Q1 2024/25	No benchmarking data is available
Waiting times for child mental health services for month at quarter end (time in weeks)*	Performance	9 (Q4 2024/25)		**Worse** by 2 week compared with Q3 2024/25 **Better** by 4 weeks compared with Q4 2023/24	No benchmarking data is available

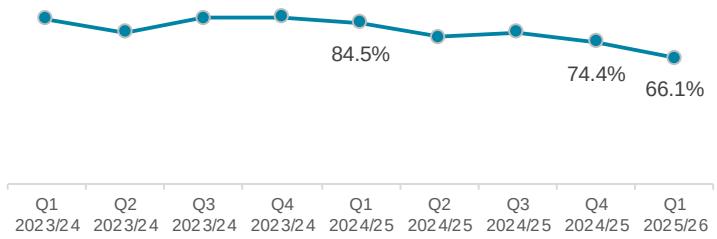
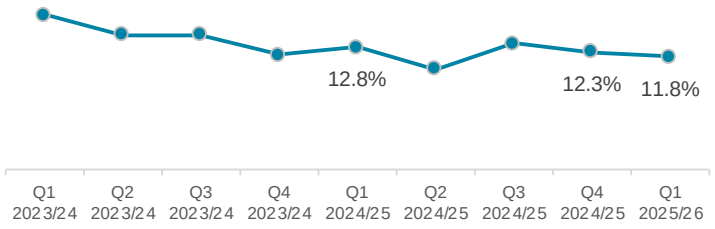
*Quarter 1 2025/26 data not available until August/September 2025

Public Health and Corporate Resources

Corporate Resources Measures

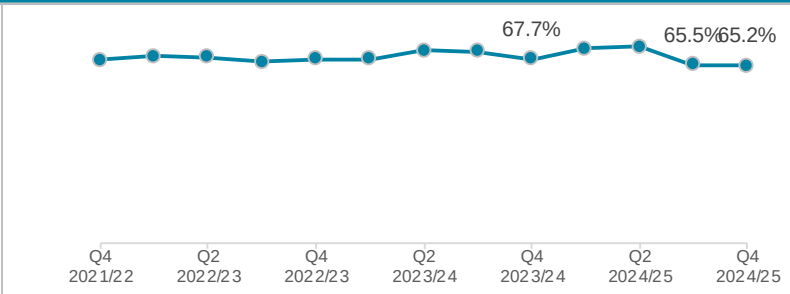
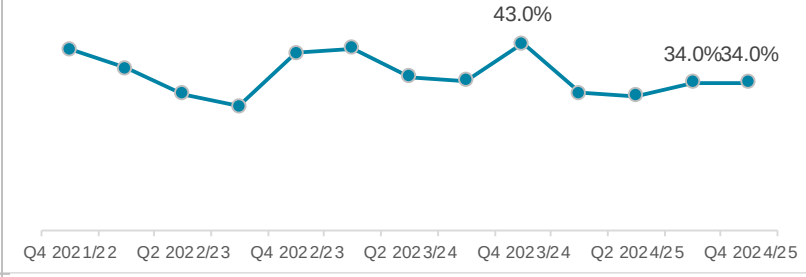
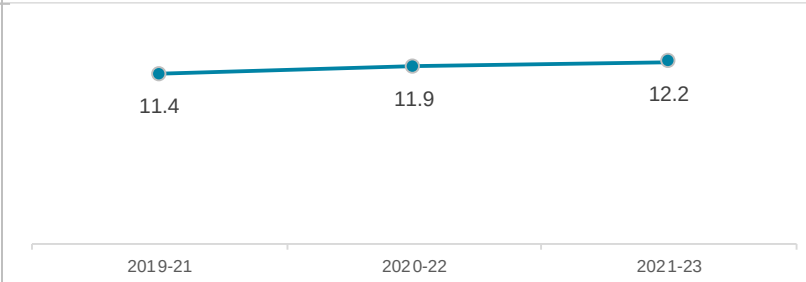
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Total £ Social Value delivered (derived from contracts above £100k per annum with commitments recorded via the Social Value Portal)	Performance	£3,343,209 (Q1 2025/26)		**Better** by £8.3M compared with Q4 2024/25 **Worse** by £4.8M compared with Q1 2024/25	No benchmarking data is available
Percent of stage 3 complaints completed in time	Performance	100% (11 / 11) (Q1 2025/26)		**Same** by 0 percentage points compared with Q4 2024/25 **Better** by 14 percentage points compared with Q1 2024/25	No benchmarking data is available due to different complaints processes across Council's
Number of stage 3 complaints received	Demand	13 (Q1 2025/26)		**Static** by 0 complaints compared with Q4 2024/25 **Decrease** by 5 complaints compared with Q1 2024/25	No benchmarking data is available due to different complaints processes across Council's

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
No. of Ombudsman complaints upheld	Performance	4 (Q1 2025/26)		**Better** by 1 complaint compared with Q4 2024/25 **Same** by 0 complaint compared with Q1 2024/25	Kirklees - 3 Bradford - 3.6 Calderdale - 9.1 Leeds - 5.3 Wakefield - 2.2 Upheld decisions per 100,000 residents (2023/24)
Percent of Ombudsman complaints upheld	Performance	33% (4 / 12) (Q1 2025/26)		**Better** by 12 percentage points compared with Q4 2024/25 **Better** by 18 percentage points compared with Q1 2024/25	0.62 - 62% National - 80% (2023/24)
Vacancy rate (percent of vacant positions across the Council)	Performance	14% (1106 / 7,788) (End of Q1 2025/26)		**Worse** by 3 percentage point compared with the end of Q4 2024/25 **Worse** by 7 percentage points compared with the end of Q1 2024/25	Kirklees - N/A Leeds - 2.90% Q3 2023/24

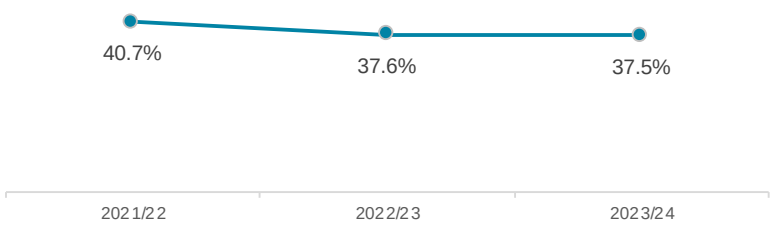
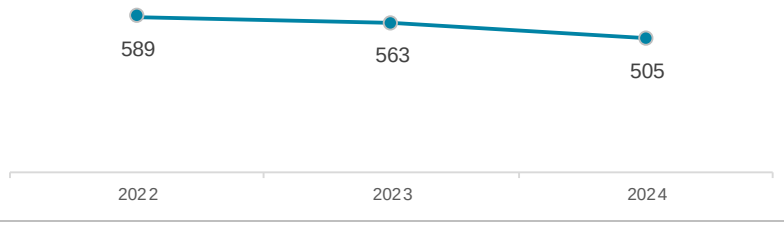
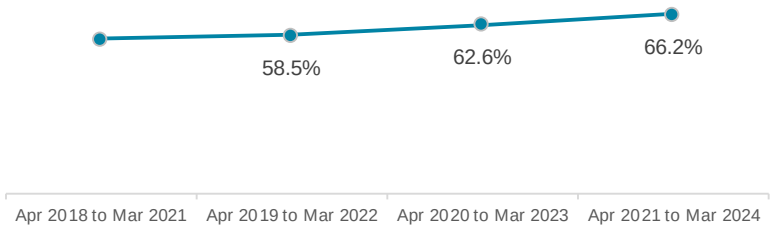
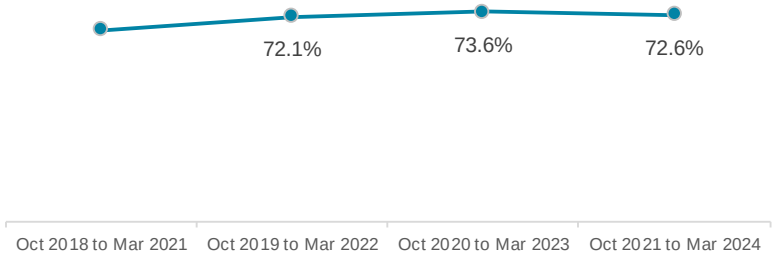
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percent of calls answered Kirklees Direct Call Centre*	Performance	66.1% (54,158 / 81,883) (Q1 2025/26)		**Worse** by 8.3 percentage points compared with the end of Q4 2024/25 **Worse** by 18.4 percentage points compared with the end of Q1 2024/25	No benchmarking data is available
Percent of follow-up calls Kirklees Direct Call Centre*	Performance	11.8% (6,417 / 54,158) (Q1 2025/26)		**Better** by 0.5 percentage point compared with the end of Q4 2024/25 **Better** by 1 percentage points compared with the end of Q1 2024/25	No benchmarking data is available

*Data is based on Kirklees Direct calls and only covers the top 7 services (Council Tax, Housing repairs, Waste, Benefits, Housing solutions, Children's and Disabled travel). The quality of call data is also always improving.

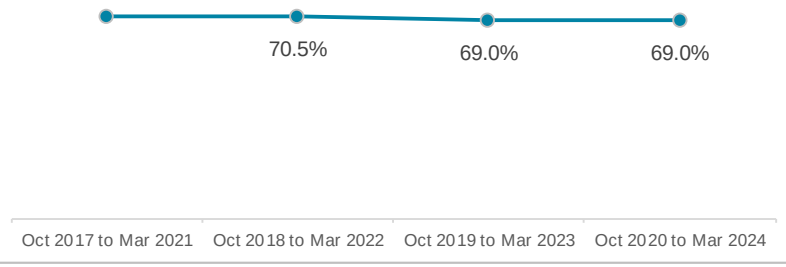
Public Health & Health Protection Measures

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Breastfeeding initiation rates (proportion of babies whose first feed included breastmilk)*	Performance	65.2% (574 / 880) (Q4 2024/25)		**Worse** by 0.3 percentage points compared with Q3 2024/25 **Worse** by 2.5 percentage points compared with Q4 2023/24	Kirklees - 63.5% National - 72.4% Breastfeeding rates (Q4 2024/25)
Percentage of people taking up an NHS Health Check invite*	Performance	34% (4,787 / 14,079) (Q4 2024/25)		**Same** by 0 percentage points compared with Q3 2024/25 **Worse** by 9 percentage points compared with Q4 2023/24	Kirklees - 34% National - 40% Percentage of people taking up an NHS Health Check invite (Q4 2024/25)
Suicide rate per 100,000 population**	Performance	12.2 (2021-23)		**Worse** by 0.3 suicides per 100,000 population compared with 2020-22 **Worse** by 0.8 suicides per 100,000 population compared with 2019-21	Kirklees - 12.2 National - 10.7 Suicide rate (persons) (January 2021 to December 2023)

*Trend data comes from local NHS Trust maternity datasets; benchmark data comes from nationally reported data; Q1 2025/26 data not available yet
**Annually collected measure, no updated data for quarter 1 2025/26

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of children who are overweight/obese in Year 6*	Performance	37.5% (2,000 / 5,333) (2023/24)		**Better** by 0.1 percentage points compared with 2022/23 **Better** by 3.2 percentage points compared with 2021/22	Kirklees - 37.5% National - 35.8% (School year 2023/24)
All new sexually transmitted infection diagnoses (rate per 100,000)	Performance	505 (2024)		**Better** by 58 diagnoses per 100,000 compared with 2023 **Better** by 84 diagnoses per 100,000 compared with 2022	Kirklees - 505 National - 632 (Jan-Dec 2024)
Cancer screening coverage: breast cancer*	Performance	66.2% (31,160 / 47,090) (Apr 2021 to Mar 2024)		**Better** by 3.6 percentage points compared with Apr 2020 to Mar 2023 **Better** by 7.7 percentage points compared with Apr 2019 to Mar 2022	Kirklees - 66.2% National - 69.9% (April 2021 to March 2024)
Cancer screening coverage: bowel cancer*	Performance	72.6% (48,865 / 67,280) (Oct 2021 to Mar 2024)		**Worse** by 1 percentage points compared with Oct 2020 to Mar 2023 **Better** by 0.5 percentage points compared with Oct 2019 to Mar 2022	Kirklees - 72.6% National - 71.8% (October 2021 to March 2024)

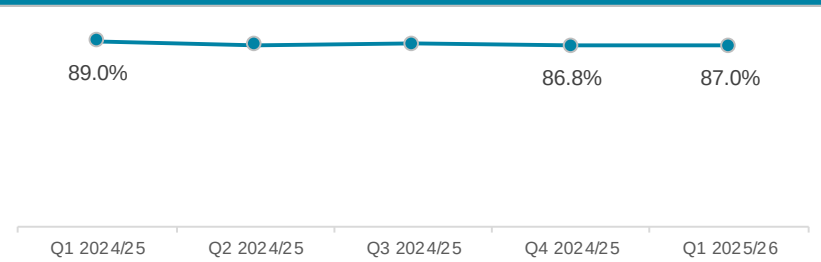
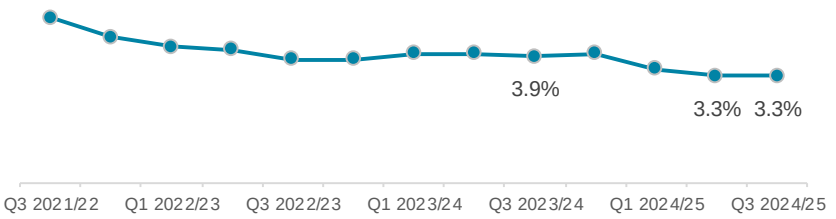
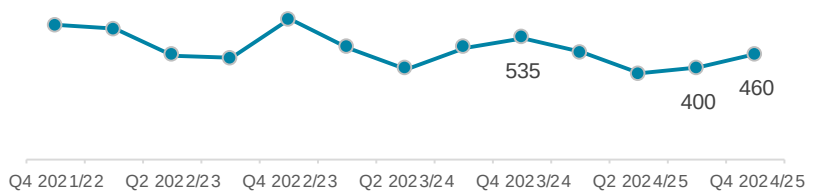
*Annually collected measure, no updated data for quarter 1 2025/26

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Cancer screening coverage: cervical cancer (aged 25-49)*	Performance	69% (52105 / 75,550) (Oct 2020 to Mar 2024)		**Same** by 0 percentage points compared with Oct 2019 to Mar 2023 **Worse** by 1.5 percentage points compared with Oct 2018 to Mar 2022	Kirklees - 69% National - 67.5% (October 2020 to March 2024)

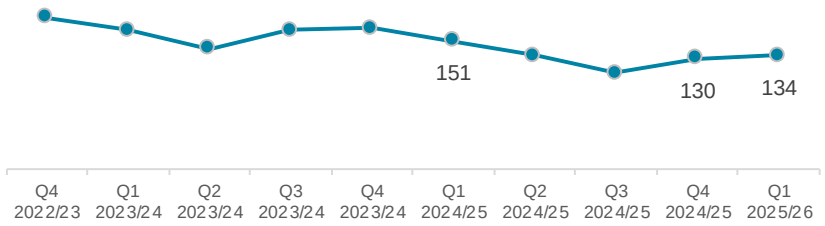
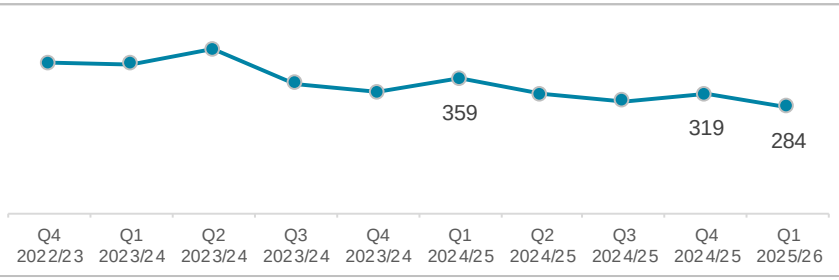
*Annually collected measure, no updated data for quarter 1 2025/26

Place

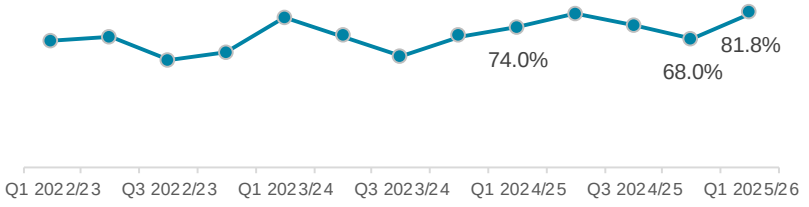
Skills & Regeneration Measures

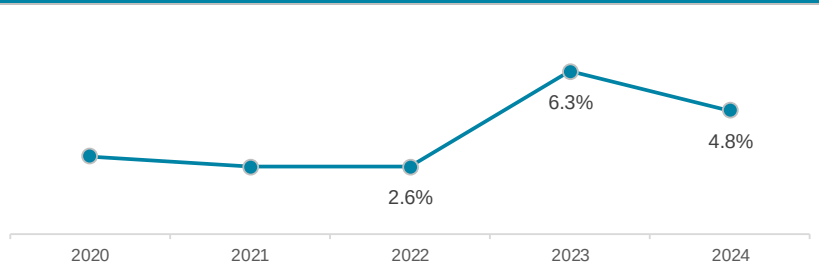
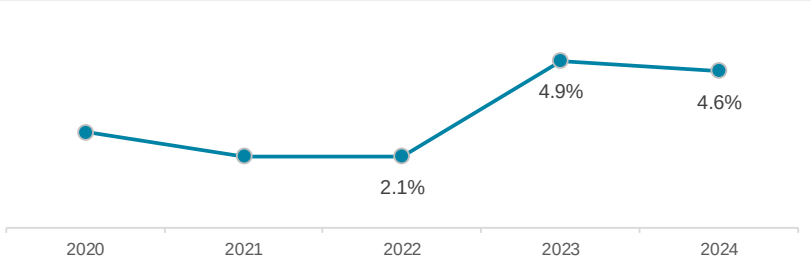
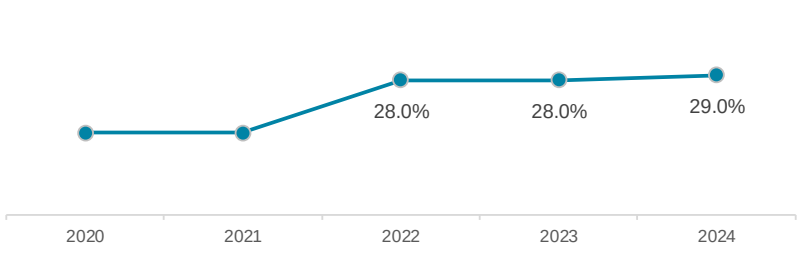
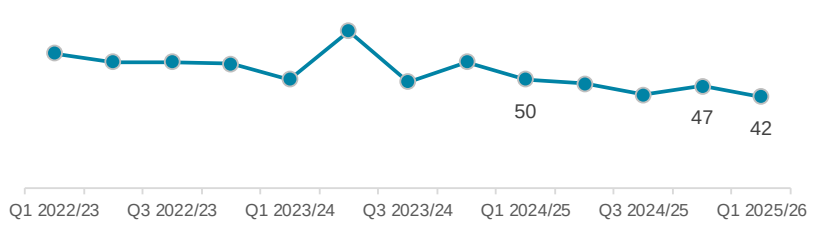
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Occupancy rate of council business centre units rented out (per square foot).	Performance	87.04% (14,748.30 sq ft / 169,368.17 sq ft) (Q1 2025/26)		**Better** by 0.24 percentage points compared with O4 2024/25 **Worse** by 1.96 percentage points compared with Q1 2024/25	No benchmarking data is available this is a locally specified measure
Unemployment Rate*	Performance	3.3% (7,500 / 227,500) (Q3 2024/25)		**Same** by 0 percentage points compared with Q2 2024/25 **Better** by 0.6 percentage points compared with Q3 2023/24	Kirklees - 3.3% Yorkshire and the Humber - 2.9% (Dec - Jan 24)
Business deaths**	Performance	460 (Q4 2024/25)		**Worse** by 60 businesses compared with Q3 2024/25 **Better** by 75 businesses compared with Q4 2023/24	Kirklees - 14.84 West Yorkshire - 15.44 Business deaths per 10,000 people aged 16+ (Oct-Dec '24)

*Data taken from national dataset so there is a 6-month lag, most up to date data available is for the period Jan to Dec 2024
**Data taken from national datasets, there is a 3-month lag, most up to date data available is for Jan to Mar 2025

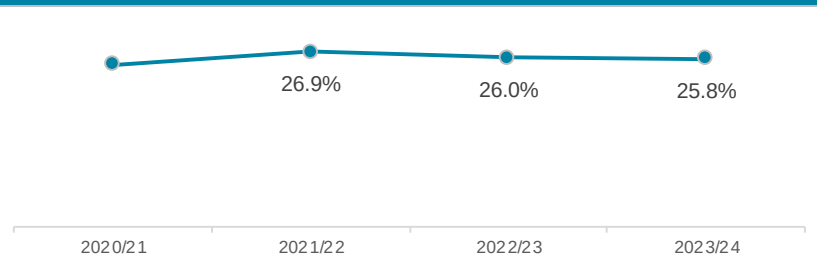
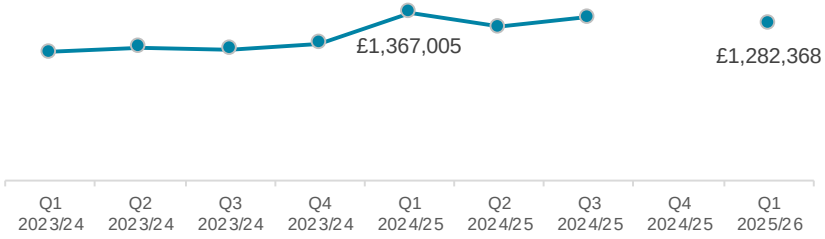
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of planning applications received - minor	Demand	134 (Q1 2025/26)		**Increase** by 4 applications compared with Q4 2024/25 **Decrease** by 17 applications compared with Q1 2024/25	Kirklees - 2.9 Yorkshire and the Humber - 2.7 Number of minor planning application decisions per 1,000 properties (Apr 24 - Mar 25)
Number of planning applications received - other	Demand	284 (Q1 2025/26)		**Decrease** by 35 applications compared with Q4 2024/25 **Decrease** by 75 applications compared with Q1 2024/25	Kirklees - 6.6 Yorkshire and the Humber - 6.5 Number of other planning application decisions per 1,000 properties (Apr 24 - Mar 25)

Highways, Streetscene & Waste Measures

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of street lighting faults attended within published timeframes (7 working days).	Performance	81.8% (426 / 521) (Q1 2025/26)		**Better** by 13.8 percentage points compared with Q4 2024/25 **Better** by 7.8 percentage points compared with Q1 2024/25	No benchmarking data is available

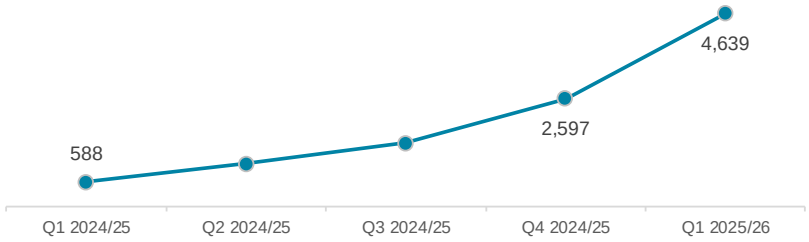
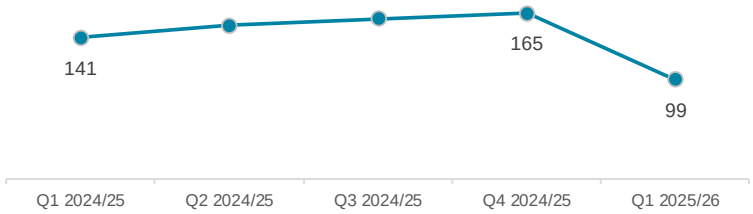
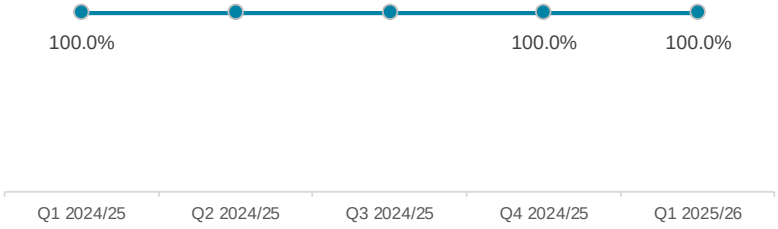
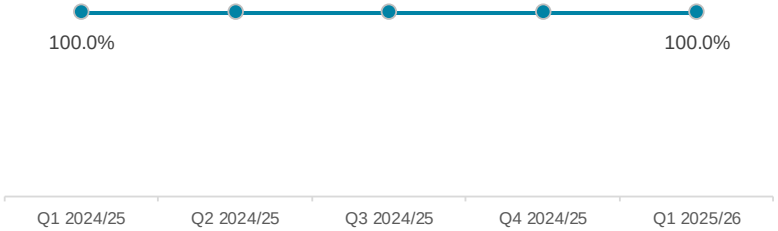
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
% of B and C roads that should be considered for maintenance (categorised as red and may need maintenance)*	Performance	4.8% (2024)		**Better** by 1.5 percentage points compared with 2023 **Worse** by 2.2 percentage points compared with 2022	Kirklees - 4.8% Yorkshire and the Humber - 3% (2024)
% of A roads that should be considered for maintenance (categorised as red and may need maintenance)*	Performance	4.6% (2024)		**Better** by 0.3 percentage points compared with 2023 **Worse** by 2.5 percentage points compared with 2022	Kirklees - 4.6% Yorkshire and the Humber - 4% (2024)
% of U roads that should be considered for maintenance (categorised as red and may need maintenance)*	Performance	29% (2024)		**Worse** by 1 percentage points compared with 2023 **Worse** by 1 percentage points compared with 2022	Kirklees - 29% Yorkshire and the Humber - 17% (2024)
People killed or seriously injured in road traffic accidents	Performance	42 (Q1 2025/26)		**Better** by 5 accidents compared with Q4 2024/25 **Better** by 8 accidents compared with Q1 2024/25	Kirklees - 52 Yorkshire and the Humber - 60.4 Number of people killed or seriously injured in road traffic accidents per 100,000 population (2023)

*Annually collected measures, there is a 12 month lag in data reporting

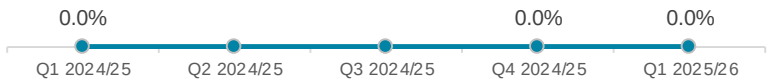
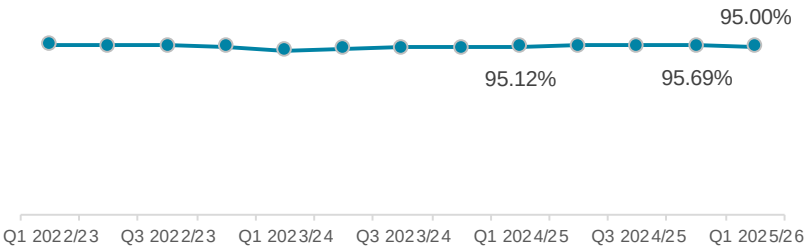
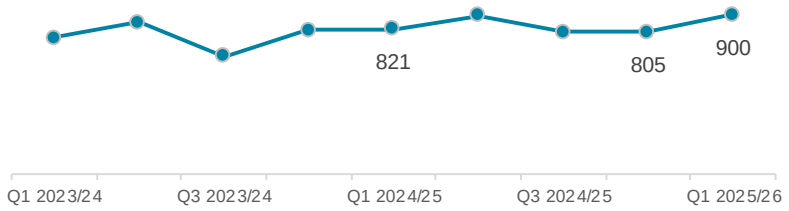
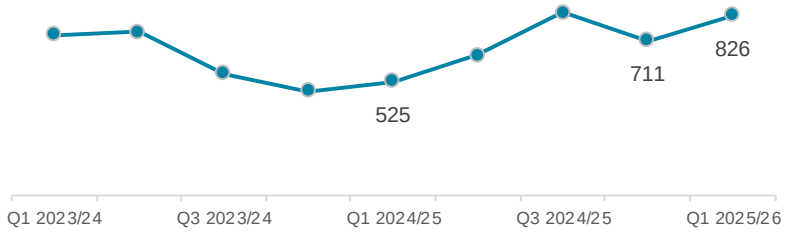
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of household waste sent for reuse, recycling or composting (Ex NI192)*	Performance	25.8% (41,042 / 158,826) (2023/24)		**Worse** by 0.2 percentage points compared with 2022/23 **Worse** by 1.1 percentage points compared with 2021/22	Kirklees - 25.8% Yorkshire and the Humber - 41% (2023/24)
Residual household waste per household (kg/household) (Ex NI191) *	Performance	611.8 (2023/24)		**Worse** by 12.1 Kg per household compared with 2022/23 **Better** No comparison data available for 2021/22	Kirklees - 611.8 Bradford - 593.2 Calderdale - Leeds - 530.5 Wakefield - 482.9 (2023/24)
Parking income.	Performance	£1,282,368 (Q1 2025/26)		No comparison data available for Q4 2024/25 **Worse** by £84,637 compared with Q1 2024/25	No benchmarking data is available

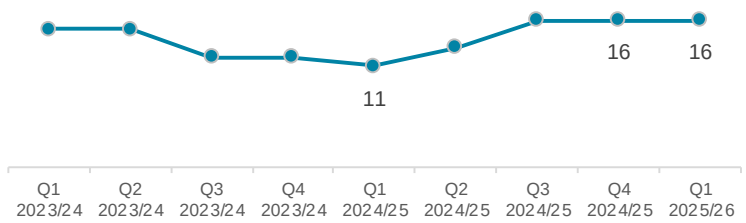
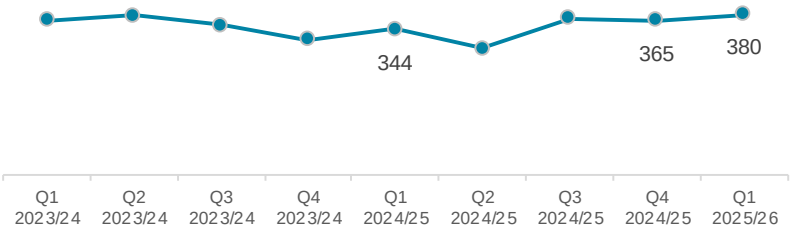
*Annually collected measures, most up to date data available at time of producing the report

Homes & Neighbourhoods Measures

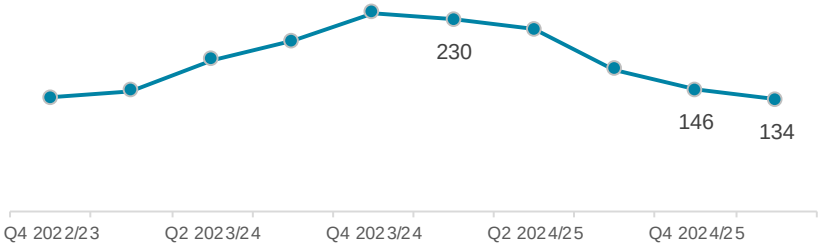
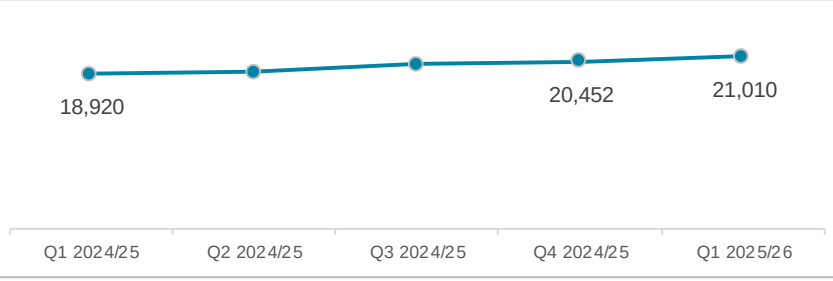
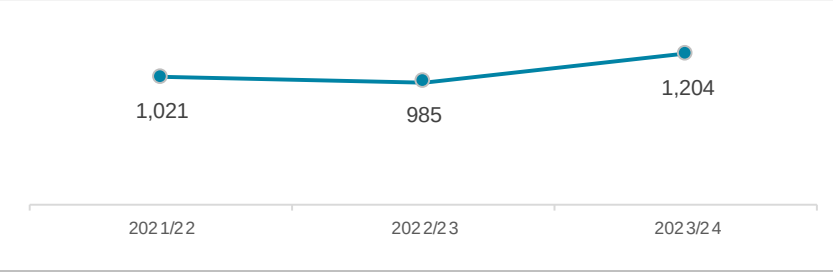
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of closed damp, mould and condensation cases	Demand	4,639 (Q1 2025/26)		**Increase** by 2,042 cases compared with Q4 2024/25 **Increase** by 4051 accidents compared with Q1 2024/25	No benchmarking data is available
Average length of open damp, mould and condensation cases (in days)	Performance	99 (Q1 2025/26)		**Better** by 66 cases compared with Q4 2024/25 **Better** by 42 cases compared with Q1 2024/25	No benchmarking data is available
Proportion of homes for which all required fire risk assessments have been carried out.	Performance	100% (Q1 2025/26)		**Same** by 0 percentage points compared with Q4 2024/25 **Same** by 0 percentage points compared with Q1 2024/25	No benchmarking data is available
Percent of Fire risk assessments carried that were due to be carried out.	Performance	100% (309 / 309) (Q1 2025/26)		**Same** by 0 percentage points compared with Q4 2024/25 **Same** by 0 percentage points compared with Q1 2024/25	No benchmarking data is available

*Most up to date data available at time of producing the report

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of fire risk assessments reported to the regulator that are outstanding.	Performance	0% (Q1 2025/26)		**Same** by 0 percentage points compared with Q4 2024/25 **Same** by 0 percentage points compared with Q1 2024/25	No benchmarking data is available
Proportion of emergency responsive repairs completed within timescale.	Performance	95% (6,017 / 6,269) (Q1 2025/26)		**Worse** by 0.69 percentage points compared with Q4 2024/25 **Worse** by 0.12 percentage points compared with Q1 2024/25	No benchmarking data is available
Number of disabled facilities grants (DFG) adaptations referrals**	Demand	900 (Q1 2025/26)		**Increase** by 95 referrals compared with Q4 2024/25 **Increase** by 79 referrals compared with Q1 2024/25	No benchmarking data is available
Number of households on the disabled facilities grants (DFG) adapatations waiting list	Demand	826 (Q1 2025/26)		**Increase** by 115 households compared with Q4 2024/25 **Increase** by 301 households compared with Q1 2024/25	No benchmarking data is available

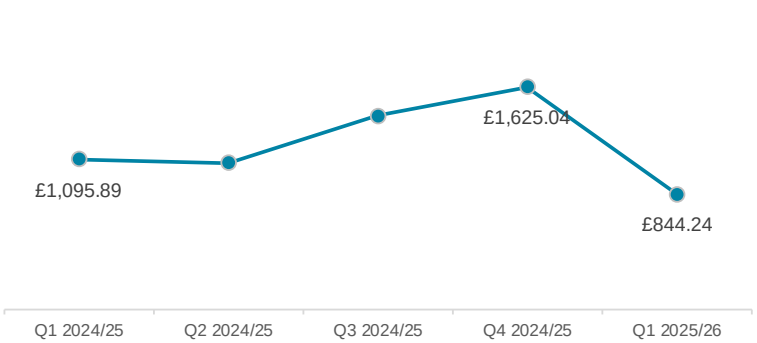
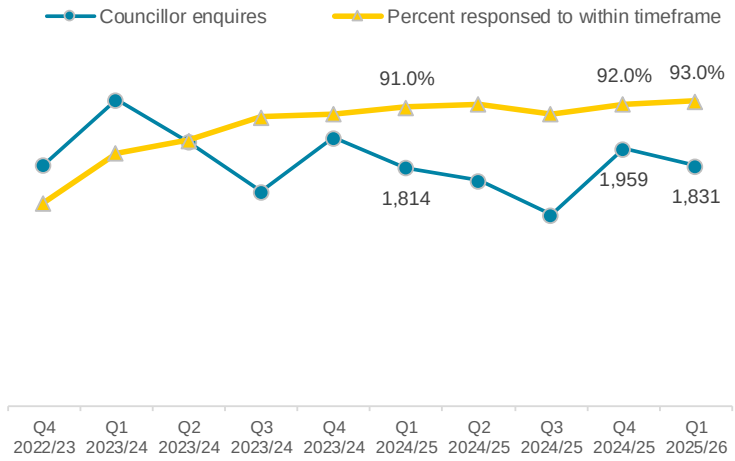
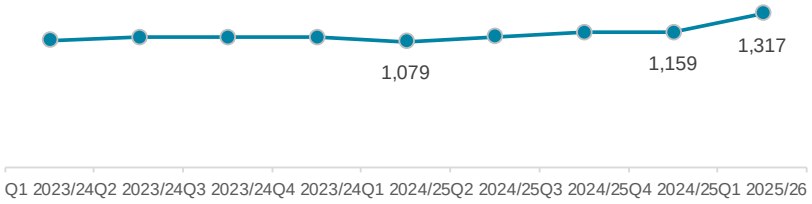
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Average wait time for a disabled facilities grants (DFG) assessment of need for all tenures (weeks)*	Performance	16 (Q1 2025/26)		**Same** by 0 weeks compared with Q4 2024/25 **Worse** by 5 weeks compared with Q1 2024/25	No benchmarking data is available
Average wait time to deliver disabled facilities grants (DFG) adaptations for all tenures (days)**	Performance	380 (Q1 2025/26)		**Worse** by 15 days compared with Q4 2024/25 **Worse** by 36 days compared with Q1 2024/25	No benchmarking data is available

Development Measures

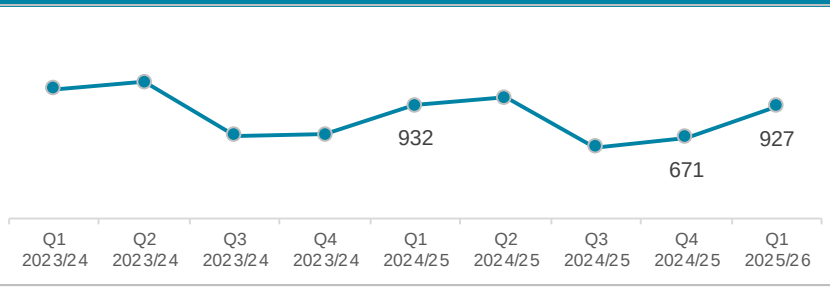
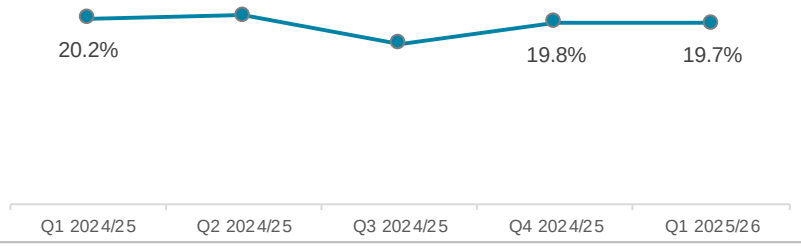
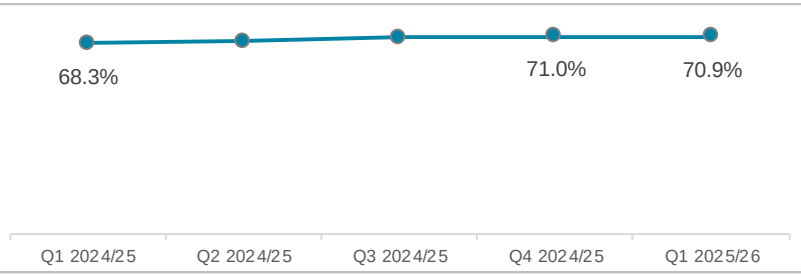
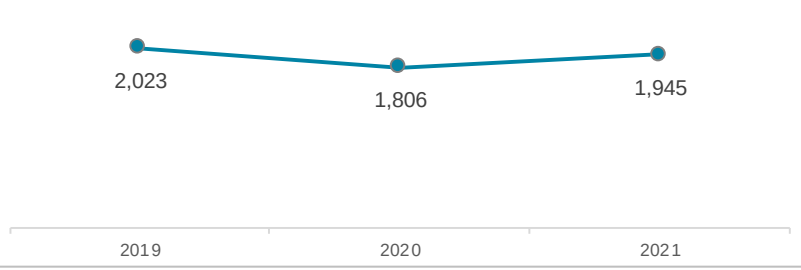
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of households in B&B temporary accommodation.	Demand	134 (Q1 2025/26)		**Decrease** by 12 households compared with Q4 2024/25 **Decrease** by 96 households compared with Q1 2024/25	Kirklees - 47.6% Yorkshire and the Humber - 37.9% % of households in B&B temporary accommodation (Q4 2023/24)
Number of applicants on Housing Register	Demand	21,010 (Q1 2025/26)		**Increase** by 558 applicants compared with Q4 2024/25 **Increase** by 2090 applicants compared with Q1 2024/25	No benchmarking data is available
Total Market Homes Delivered*	Performance	1204 (2023/24)		**Better** by 219 homes delivered compared with 2022/23 **Better** by 183 homes delivered compared with 2021/22	No benchmarking data is available

*Annually collected measure, most up to date data available at time of report production

Environmental Strategy & Climate Change Measures

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Average cost per child accessing home to school transport for the quarter	Performance	£844 (Q1 2025/26)		**Better** by £781 per child within the quarter compared with Q4 2024/25 **Better** by £252 per child within the quarter compared with Q1 2024/25	DfT are looking at collecting data nationally next year
Percent of Councillor enquires (across the whole Council) responded to within timeframe*	Performance	93% (1,475 / 1,581) (Q1 2025/26)		**Better** by 1 percentage points compared with Q4 2024/25 **Better** by 2 percentage points compared with Q1 2024/25	No benchmarking data is available
Number of Councillor enquires received across the whole Council*	Demand	1,831 (Q1 2025/26)		**Decrease** by 128 enquires compared with Q4 **Increase** by 17 enquires compared with Q1 2024/25	No benchmarking data is available
Number of Hackney carriage and private hire licenses	Demand	1,317 (Q1 2025/26)		**Increase** by 158 licenses compared with Q4 2024/25 **Increase** by 238 licenses compared with Q1 2024/25	◆ Kirklees - 8.1 West Yorkshire - 8.1 Total licensed vehicles (Taxis, Private Hire Vehicles (PHVs)) per 1,000 people aged 16+ (Apr-2024)

*Most up to date data available at the time of report production

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of noise pollution complaints	Demand	927 (Q1 2025/26)		**Increase** by 256 complaints compared with Q4 2024/25 **Decrease** by 5 complaints compared with Q1 2024/25	Kirklees - 8.2 Yorkshire and the Humber - 8.1 Rate of complaints about noise per 1,000 population (2020/21)
Food hygiene percent of premises rated 4 stars	Performance	19.67% (701 / 3,564) (End of Q1 2025/26)		**Worse** by 0.1 percentage points compared with the end of Q4 2024/25 **Worse** by 0.5 percentage points compared with the end of Q1 2024/25	No benchmarking data is available
Food hygiene percent of premises rated 5 stars	Performance	70.9% (2527 / 3,564) (End of Q1 2025/26)		**Worse** by 0.1 percentage points compared with the end of Q4 2024/25 **Better** by 2.6 percentage points compared with the end of Q1 2024/25	No benchmarking data is available
Carbon dioxide equivalent (CO2e) emissions for the District (measured in kilotonnes of carbon dioxide equivalent (KT CO2e))*	Performance	1,945 (2021)		**Better** by 139 KT CO2e compared with 2020 **Worse** by 78 KT CO2e compared with 2019	Kirklees - 1809 Bradford - 2009 Calderdale - 965.8 Wakefield - 1994.8 CO2e emissions for the District (KT CO2e) (2022)

*Annually collected measure, most up to date data available at the time of report production

Kirklees COUNCIL

REPORT TITLE: Corporate Financial Monitoring Report, Quarter 1.

Meeting:	**Cabinet**
Date:	**9th September 2025**
Cabinet Member (if applicable)	**Councillor Graham Turner**
Key Decision **Eligible for Call In**	**Yes** **Yes**

Purpose of Report: To receive information on financial monitoring for General Fund Revenue, Housing Revenue Account (HRA) and Capital Plan, as at Quarter 1 (month 3), 2025/26.

Recommendations

1) note the forecast revenue outturn position at Quarter 1 for 2025/26 (£5.9m overspend) and that and that Executive Directors have been asked to bring forward sustainable proposals to reduce the overspend to bring the budget back into balance.

2) approve that the £149k of the budget amendment for Christmas week bin collections be redirected to support the Flytipping strategy £100k and the Kirklees Clean-Up project £49k.

3) note the Quarter 1 forecast that the Dedicated Schools Grant (DSG) deficit is forecast to increase by £12.5m in 2025/26 to £76.3m.

4) note the Quarter 1 forecast HRA position as £181k overspend and forecast year-end reserves position of £14m;

5) note the Quarter 1 forecast capital monitoring position for 2025/26 and approve a further net reduction in the 2025/26 position of £9.6m due to £9.9m re-profiling (£7.2m General Fund and £2.7m HRA) into future years. Also note £0.4m net increase in the overall capital plan (£0.3m 2025/26, £0.1m 2026/27) due to increased grant and S106 contributions as set out in the accompanying slides (Appendix 1 slides 33-38 and Appendix 3);

6) note the Quarter 1 treasury management prudential indicators (slide 39-52, Appendix 1).

Reasons for Recommendations

This Quarter 1 report updates the Cabinet on the current financial position as of Month 3 (30 June), together with key risks.

Resource Implications:

To note information on financial monitoring for General Fund Revenue, DSG, Housing Revenue Account (HRA) and Capital Plan, as at Quarter 1 (month 3), 2025/26.

Date signed off by <u>Executive Director</u> & name	**Rachel Spencer Henshall – 21 August 2025**
Is it also signed off by the Service Director for Finance?	**Kevin Mulvaney – 21 August 2025**
Is it also signed off by the Service Director for Legal Governance and Commissioning?	**Sam Lawton – 21 August 2025**

Electoral wards affected: All

Ward councillors consulted: None

Public or private: Public

Has GDPR been considered? Yes. This report contains no information that falls within the scope of General Data Protection Regulations.

1. Executive Summary

1.1 The attached slides provide information on financial monitoring for General Fund, Revenue, DSG, Housing Revenue Account (HRA) and Capital Plan, as at Quarter 1 (month 3), 2025/26.

Cabinet are advised that the projected overspend at Q1 of £5.9m for the General Fund is the lowest Q1 forecast overspend since COVID. The projected overspends in each of the last few years at the equivalent period and outturn are shown below

	Q1 Projection (£m)	Outturn (£m)
2022/23	24.6	27.0
2023/24	20.3	7.3
2024/25	12.9	5.6

1.2 It is evident that the additional resources that were included in Directorate base budgets as part of the 2025/26 budget are having the desired effect. The size of the projected overspend is lower and whilst there are still some variations, as described below, these are fewer in number.

1.3 As a result of this progress the vacancy freeze has been removed and posts are now beginning to be released for recruitment, although release of posts are still subject to review by Executive Directors and then the Head of People Services and the S151 Officer on a fortnightly basis.

1.4 Services are now in a position where provided they live within their means and stick to their approved budgets, they can now spend budgets to deliver outcomes rather than spend on what was previously termed as essential spend only.

1.5 Clearly this position will be kept under review as the year progresses.

2. Information required to take a decision

2.1 The slides accompanying this report provide a more detailed breakdown of the projected outturn financial monitoring position, as follows:

Forecast General Fund revenue outturn position in 2025/26 by service area;

General Fund reserves and balances movements in-year;

Forecast HRA revenue outturn position including movements in HRA reserves in-year;

Forecast capital outturn position in 2025/26;

Treasury management prudential indicators.

3. Implications for the Council

3.1 Council Plan

N/A

3.2 Financial Implications

3.2.1 The forecast outturn position at Q1 is a projected overspend of £5.9m after the use of £2m of the budget contingency reserve. Within the position of £5.9m, an estimated £4.3m is due to slippage in the approved savings programme across the Council.

3.2.2

2025/26 Forecast – Quarter 1

	Revised Budget £000	Forecast Q1 £000	Variance Q1 £000
Children and Families	86,594	90,521	3,927
Adults and Health	110,586	112,271	1,685
Place	54,741	57,693	2,952
Public Health & Corporate Resources	61,468	61,191	(277)
Central Budgets	73,901	73,551	(350)
General Fund	**387,290**	**395,227**	**7,937**
Use of Budget Contingency Reserve	-	(1,993)	(1,993)
Adjusted General Fund Total	**387,290**	**393,234**	**5,944**

Kirklees COUNCIL

3.2.3 The key service variations (outlined in more detail in the slide deck) are summarised below.

3.2.4 The projected outturn position for **Children's Services** at Q1 is pressure of £3.9m. The main reasons for the current projected position are demand led pressures primarily in the

cost and number of External Residential Placements (ERPs). As at Q1, there were 43 External Residential Placements, an increase of 11 since 31/03/25 and the average placement cost has increased from £6.1K p/w to £6.5K p/w. It is also noted that numbers of LAC (Looked After Children) have increased recently. At Q1, the number had increased to 652 from 635 at 31/03/25.

3.2.5 The overall projected position for the **Adults & Health** Directorate is an overspend of £1.7m.

3.2.6 Within the Adult Social Care related portfolio, there is a small overall variance on demand led activities (external provision) of £0.1m but within this, Residential and Nursing care home placements, and Independent Homecare are projecting overspends respectively of £3.2m and £0.1m, offset by underspends on Shared Lives (£0.4m), Carers/Emergency Support (£0.8m), and on Self-Directed Support (£2.0m), the latter mainly in relation to Commissioned Services. There is also a variance in relation to the previous year savings target around income/debt £1.8m not achieved. A small underspend is being projected across employee budgets (£0.1m).

3.2.7 There is also an adverse variance in relation to Castle Grange and Claremont House care homes – the delay in their sale has resulted in a reduced level of expected saving against the assumed levels within Adult Social Care and Place. It is estimated that £0.4m of variance will be funded as a one-off from the budget contingency reserve.

3.2.8 The Communities and Access portfolio is projecting an underspend of £0.3m, with small variances across a range of activities.

3.2.9 The overall projected position for the **Place** directorate as at Q1 is an overspend of £2.9m

- In Development there is an overspend of £0.5m that largely relates to the management and maintenance of corporate buildings.

- Highways & Street scene is forecast to overspend by £1.0m, with the main pressure areas being Parking £0.7m and Highways £0.5m.

- Pressures of c£1.5m in relation to the cost of Home to School Transport are forecast. It is proposed that the Strategic Budget contingency reserve is used to mitigate this pressure in 2025/26

3.2.10 **Public Health and Corporate Resources** – The projected underspend forecast at Q1 is -£0.3m. This is predominantly due to vacancies across the directorate. There are some demand pressures on Legal Services creating a £0.5m overspend. No variations are currently forecast on the Housing Benefit Subsidy loss at Q1. This will be kept under close monitoring.

3.2.11 At Quarter 1 there is a projected underspend of £0.4m in **Central Budgets**. This sits within Treasury Management and is related to slippage in the in-year capital plan and a combination of interest rates on borrowing taken to date being lower than budgeted and interest income on balances. The approved budget included an amendment of £149k for Christmas week bin collections. It has not been possible to progress this and therefore it is be proposed that it is redirected to support the Flytipping strategy £100k and the Kirklees Clean-Up project £49k.

3.2.12 Executive Directors have been asked to bring forward proposals to bring the projected overspend back into a balanced position and there remains in place controls on recruitment

whereby all posts have to be approved for release by Executive Directors, the Head of HR and the S151 officer

3.2.13 Total forecast usable reserves at 31 March 2026, excluding any impact of this projected overspend are £64.9m, of which £38.8m are identified as earmarked.

Dedicated Schools Grant

3.2.14 The projected outturn position for the DSG at Q1 is an in year overspend of £12.5m which will increase the cumulative deficit to £76.3m The service is working collaboratively with schools to change the way in which funding is allocated to mainstream schools for children with SEND through the introduction of "Cluster Working" and it is anticipated that over time this will lead to stabilisation of costs and reductions. A more robust approach to contract management has also been introduced and this is helping to mitigate the impact of provider increases although the cost of Independent School Places still continues to rise, as does demand.

3.2.15 As part of the Safety Valve agreement the Council will contribute a sum of £2.15m per annum for 5 years. This is fully provided for in the budget. Members are reminded that the Statutory Override of DSG deficits has been extended to March 2028 and that the Council is awaiting further guidance from the Government as to the treatment of deficits.

3.2.16 The deficit has a significant impact upon Council cash flows as it has to fund this deficit from existing balances, which it could have ordinarily used to help manage borrowing on the capital plan. This Council, along with others, has made representation to the DfE as to the cost of this which indicatively is £3.8m at 5%

HRA

3.2.17 The projected outturn for the HRA at Quarter 1 is a small forecast overspend of £181k. There are continued pressures around building safety and maintenance of housing stock and the resources required to support this. However significant Improvements have been made in relation to damp mould and condensation cases and disrepair cases. Following the increased charges to tenants and leaseholders for communal services from April 2025, there has been a reduction in the shortfall for these services.

Quarter 1 Capital

3.2.18 The budget for the Capital Plan including rollover was set at £300.4m within the Financial Outturn & Rollover Report 2024/25. Since then, capital budgets have been further reviewed under Financial Procedure Rules 3.8-3.14, in terms of re-profiling slippage into future years, with the aim of narrowing of the gap between the reported in-year capital budget and forecast outturn for 2025/26. To date the review has identified slippage of £9.9m (General Fund £7.2m, HRA £2.7m) being re-profiled into subsequent financial years offset by an increase in grant allocations of £0.3m, representing an overall reduction of £9.6m (Appendix 3).

3.2.19 The Council's revised capital budget at Quarter 1 for 2025/26 is £290.8m. The forecast capital outturn at Quarter 1 is £290.8m. The capital monitoring is presented as in-line with budget, with any slippage identified being re-profiled into future years. The Quarter 1 position is summarised in the Table below

	Rollover Plan	Change / Re-profile	Revised Budget Q1	Actual Costs	Forecast at Q1	Variance Q1
	£'000	£'000	£'000	£'000	£'000	£'000
Children and Families	25,727	0	25,727	1,466	25,727	0
Adults & Health	4,223	0	4,223	371	4,223	0
Place	204,201	(6,686)	197,515	24,700	197,515	0
Public Health & Corporate Resources	18,848	(203)	18,645	458	18,645	0
General Fund	**252,999**	**(6,889)**	**246,110**	**26,995**	**246,110**	**0**
HRA	**47,363**	**(2,679)**	**44,684**	**6,201**	**44,684**	**0**
TOTAL	**300,362**	**(9,568)**	**290,794**	**33,196**	**290,794**	**0**

3.2.20 Noting that Quarter 1 is an early capital forecast, officers will continue to review capital budget profiles in year, including any more detailed recommendations for potential re-profiling of scheme budgets between years (allowable under Financial Procedure Rules 3.8-3.14), as part of future financial monitoring. Any such recommendations would reflect the affordability, sustainability and prudence of the Capital Programme in the context of the Council's financial review.

Updated Multi-year Capital Plan

EXPENDITURE CAPITAL PLAN	2025/26 £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000	2029/30 -31/32 £'000	Total £'000
Children & Families	25,727	29,573	21,610	3,827	2,750	**83,487**
Adults & Health	4,223	8,424	3,031	0	0	**15,678**
Place	197,515	222,487	121,792	77,907	144,195	**763,896**
Public Health & Corporate Resources	18,645	11,681	11,911	11,569	11,100	**64,906**
GENERAL FUND	246,110	272,165	158,344	93,303	158,045	**927,967**
HOUSING REVENUE ACCOUNT	44,684	65,565	70,589	54,502	109,874	**345,214**
COUNCIL TOTAL	**290,794**	**337,730**	**228,933**	**147,805**	**267,919**	**1,273,181**

3.2.21 The multi-year Capital plan currently stands at £1.27bn overall (see also slides 37-38) an increase of £0.4m, all held within the General Fund. Additional Local Electric Vehicle Infrastructure (LEVI) funding of £0.3m for Phase 1 Electric Vehicle Charging points in Kirklees is now included within the plan. A further £0.1m has been received in S106 contributions towards the Lees Holme Park Playable Spaces scheme within the Play Strategy Capital Plan.

3.2.22 A review of the overall Capital Plan is underway. All schemes will be reviewed in respect of baseline need, strategic priorities, deliverability and affordability. The review will also consider new capital bid proposals by services which will be assessed by the Capital Assurance Board prior to recommendations for inclusion within the plan. Future capital plan updates will continue to be presented to Council via the annual budget strategy update and annual budget approval reports to Cabinet and Council as a matter of course, as part of the annual planning cycle.

3.3 Legal Implications

Section 28 Local Government Act 2003 imposes a statutory duty, from time to time to carry out budget monitoring of expenditure and income against budget calculations during the financial year. If there is a deterioration in its financial position the council must take such action as it considers necessary to remedy the situation.

3.4 Climate Change and Air Quality

N/A

3.5 Other (eg Risk, Integrated Impact Assessment or Human Resources)

There is an ongoing risk around the volatility of demand budgets.

4 Consultation

This report has been prepared by the Service Director - Finance, in consultation with the Executive Leadership Team.

5 Engagement

N/A

6 Options

6.1 Options considered

N/A

6.2 Reasons for recommended option

N/A

7 Next steps and timelines

That Cabinet endorse the recommendations set out in this report.

8 Contact officer

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james.anderson@kirklees.gov.uk
Sarah Hill, Finance Manager
sarahm.hill@kirklees.gov.uk

9 Background Papers and History of Decisions

Annual budget report 2025-27 to Budget Council, 5 March 2025
Budget Strategy Update Report to Council, 17 September 2025

10 Appendices

Appendix 1: Financial Monitoring slides
Appendix 2: Savings Plan slides
Appendix 3: Breakdown of Capital Budget Changes Since Council Budget Report 2025/26

11 **Service Director responsible** Kevin Mulvaney, Service Director – Finance.

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2025/26 Revenue Budget Monitoring – Quarter 1

Cabinet 9th September 2025

Revenue Headlines

- Projected overspend of **£5.9m**
- Savings forecast to be delivered at 86% of the target of £30.2m (£26.8m 25/26 and £3.4m prior years)

- Total Useable Reserves of £**65m** at 31st March 2025 of which:
- Unallocated reserves of **£26m**
- Earmarked Reserves of **£39m**

2025/26 Forecast – Quarter 1

	Revised Budget £000	Forecast Q1 £000	Variance Q1 £000
Children and Families	86,594	90,521	3,927
Adults and Health	110,586	112,271	1,685
Place	54,741	57,693	2,952
Public Health & Corporate Resources	61,468	61,191	(277)
Central Budgets	73,901	73,551	(350)
General Fund	**387,290**	**395,227**	**7,937**
Use of Budget Contingency Reserve	-	(1,993)	(1,993)
Adjusted General Fund Total	**387,290**	**393,234**	**5,944**

2025/26 Net Variance Analysis – Quarter 1

	Savings Slippage £000	Net Pressures £000	Total Variance £000
Children and Families	1,022	2,905	3,927
Adults and Health	1,993	(631)	1,362
Place	1,015	267	1,282
Public Health & Corporate Resources	280	(557)	(277)
Central Budgets	-	(350)	(350)
General Fund	**4,310**	**1,634**	**5,944**

Adults and Health

Older People & Physical Disabilities

Key Budget Variances – Quarter 1

Older People & Physical Disabilities – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£110,321k	£105,864k	(£4,457k)
Income	(£114,836k)	(£110,239k)	£4,597k
TOTAL	(£4,515k)	(£4,375k)	£140k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Assessment & Care Management	8,594	-288	Staffing £-320k (Independence £-351k, Community £+31k)	
Access & Information	2,117	+119	Overspend on employee budgets (Community Health & Social Care Hub)	Ongoing review and management of staffing budgets and levels.
Demand led client provision – Placements – OP	26,304	+551	Over on weekly unit costs (+£54)	Ongoing commissioning focus (alongside transformation workstreams)
Demand led client provision – Placements – PD	5,027	-428	Under on activity/volume (-59)	
Demand led client provision – Home Care (OP and PD)	21,809	+399	Over on PD (+599k) due to volumes, offset by underspend on OP (-201k) due to volumes.	Ongoing commissioning and pathways focus (alongside transformation workstreams)
Demand led client provision – Self Directed Support (including carers)	4,121	-1,479	Under on PD Commissioned services (-757k due to lower volumes). Under on OP (-421k) & PD (-154k) Direct Payments (lower volumes)	
Demand Led Client service provision savings target	-2,627	+1,832	Only partial achievement on the income/debt management savings target of -£2,627k	Ongoing review of processes, pathways and charging and debt recovery models.
TOTAL	65,345	706		

Adults and Health

Learning Disabilities & Mental Health

Key Budget Variances – Quarter 1

Learning Disabilities & Mental Health – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£144,845k	£145,989k	£1,144k
Income	(51,829k)	(£51,330k)	£499k
TOTAL	£93,016k	£94,659	£1,643k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Assessment & Care Management	5,820	-267	Employee underspend £-243k	
Demand led client provision – Placements – LD	32,448	+1,497	Over on weekly unit costs (+£71)	Ongoing commissioning focus (alongside transformation workstreams around review of packages)
Demand led client provision – Placements – MH	10,115	+1,630	Over on weekly unit costs (+£130)	Ongoing commissioning focus (alongside transformation workstreams / review of packages)
Demand led client provision – Home Care (LD and MH)	3,199	-309	Under on LD (-65k) due to volumes (-16), and under on MH (-244k) due to volumes (-25)	
Demand led client provision – Self Directed Support	27,702	-776	Under on LD (-431k) and MH (-665k) Commissioned services due to lower volumes. Offset by potential shortfall on LD income (Continuing Health Care) (+286k)	
In-house residential and Supported Living	5,638	+119	Over on Ings Grove, Moorlands Grange (mainly employees), and also on Castle Grange and Claremont House (delay in potential transfer). Offset by underspend on The Mews (employees).	Ongoing management and review of employee budgets and spending, along with continuing work around potential external transfer of Castle Grange and Claremont (assumed funded by reserves)
Reablement	305	+138	Over on Short Term Urgent Support	Ongoing review of pathways and demand.
TOTAL	85,227	2,032		

Adults and Health

Adults Sufficiency

Key Budget Variances – Quarter 1

Adults Sufficiency – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£16,466k	£16,412k	(£54k)
Income	(£3,329k)	(£3,388k)	(£59k)
TOTAL	£13,137k	£13,024k	(£113k)

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Demand led Client Service Provision	8,053	-59	Under on several contracted services.	
Commissioning	1,343	-52	Under on employees, and contractual payments.	
TOTAL	9,396	-111		

Adults and Health

Communities & Access Services

Key Budget Variances – Quarter 1

Communities & Access Services – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£15,199k	£15,483k	£284k
Income	(£6,251k)	(£6,843k)	(£592k)
TOTAL	£8,948k	£8,640k	(£308k)

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Community Plus	1,675	+80	Mainly employee overspend	Management of staffing levels and budgets
Integrated Wellness	-174	-68	Mainly employee underspend	
Library & Information Centres	4,357	-74	Mainly employee underspend	
Customers & Communities Project Team	373	-60	Mainly employee underspend	
Safer Kirklees	539	-130	Mainly employee underspend	
TOTAL	**6,770**	**-252**		

Children and Families

Child Protection & Family Support

Key Budget Variances – Quarter 1

Child Protection & Family Support – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£35,264k	£37,818k	£2,554k
Income	(£3,485k)	(£6,153k)	(£2,668)
TOTAL	£31,779k	£31,665k	(£114k)

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Front Door, EDS, Family Help	4,964	-116	• Net surplus budget from Family Time team linked to Integration service review to be reallocated to A&I service in line with budgeted establishment (£131k) •	
Assessment & Intervention / CDS	12,103	-213	• Savings linked to employee vacancies and turnover (£379k) • Budget pressure related to short term care packages with significant needs prior to care placement or prevention from entering care +£127k • Potential risk to £500k CDS Domiciliary Care savings target this year.	

Children and Families

Child Protection & Family Support

Key Budget Variances – Quarter 1

Child Protection & Family Support – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£35,264k	£37,818k	£2,554k
Income	(£3,485k)	(£6,153k)	(£2,668)
TOTAL	£31,779k	£31,665k	(£114k)

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Corporate Parenting	12,582	+285	• 18+ Leaving Care Supported Accommodation placements awaiting tenancies or in need of transitional support prior to independence +£197k • UASC and UASC LC estimated pressure due to variance between average weekly accommodation fees and eligible grant +£84k • Home to school transport pressure due to increased demand, complexity of route involving escort supervision, travel distance and breakdown in unworkable contracts with local taxi firms in previous year replaced with expensive spot purchase arrangements. New developments to be rolled out in late summer may deliver some efficiencies *tbc* +£143k • Savings on demand led Adoption allowances (£68k) • Notice of extension to DfE Personal Advisor grant (£76k)	
Contextual Safeguarding & YES	1,892	-74	• Late notification to extension of Turnaround grant for 2 years at reduced level of funding (£105k)	
TOTAL	31,541	-118		

Children and Families

Resources, Improvements & Partnership

Key Budget Variances – Quarter 1

Resources, Improvements & Partnership – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£44,542k	£47,933k	£3,391k
Income	(£5,620k)	(£5,647k)	(£27k)
TOTAL	£38,922k	£42,286k	£3, 364k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Sustainability, Capacity & Resourcing	32,803	+3,437	• Increase in demand led placement accommodation numbers and weekly fees. • External residential and unregulated placements @ 30/6/25 have increased steadily to 43 including 5 unregulated placements. • Average weekly fees amount to £6,553. Some respite to the budget maybe achieved when Woodland children's home reopens in late summer and with additional internal capacity sourced from the new 2 bed children's home almost complete. • Note – Budget under regular reviews with 2 weekly external placement panel chaired by Strategic Director +£3,437m	• Re opening of Woodlands in August • Completed purchase of new children's home • Making Kirklees Home panel reviewing external placements Chaired by SD which explores reunification, bringing children back to Kirklees and ensures appropriate care planning in place • External Placement panel chaired by Exec Director • Business case being worked on re " super foster carers" • Policy in place to match IFA rates for fostering conversations • Business case to be developed in relation to " edge of care provision " • Work ongoing with Police re increase in PPO's and alternative processes to reduce number of children coming into care
TOTAL	32,803	3,437		

Children and Families

Learning & Early Support

Key Budget Variances – Quarter 1

Learning & Early Support – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£384,196k	£372,217k	(£11,979k)
Income	(£368,303k)	(£355,647k)	£12,656k
TOTAL	£15,893k	£16,570k	£677k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Early Support	1,468	+65	• Saving Slippage as Hub employees still on payroll to July 26 (£112K) • Play Team Vacancies (-£42K)	• No further pressure from August 26
Access to Education	880	+107	• Pressure on income lines due to historical and new attendance guidance (£151K) • Periods of staff vacancies (-£44K)	
Education Psychology	1,355	+100	• Use of Locum staff to support service	
EHCP Team	1,568	+233	• Pressure on Staffing Costs (£167K) • Compensation and Mediation unbudgeted pressure (£40K) • C&K Commission unbudgeted pressure (£25K)	
Kirklees Business Solutions (KBS)	85	+60	• Staffing Pressure	• Pressure reduced by £80K through use of Central Services to Schools Block funding
TOTAL	5,356	565		

Place

Skills & Regeneration

Key Budget Variances – Quarter 1

Skills & Regeneration – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£14,842k	£13,893k	(£949k)
Income	(£12,757k)	(£11,921k)	£836k
TOTAL	£2,085k	£1,972k	(£113k)

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Business & Economy	-108	+113	• Under-recovery of rental income at The Glass Box (£113k) / Batley Business Park (£41k) • Over-recovery of income at Bretton St (-£18k) • Under-spend on planning and unplanned repairs and maintenance at Business and Enterprise Centres (-£20k)	• Holding of vacancies / net salaries in Business and Economy
Planning & Building Control	1,723	-84	• Under-spends on net salaries (-£568k) • Over-recovery of Planning Performance Agreement income (-£98k) • Under-recovery on Planning Applications (£306k), Building Control Planning Fees (£74k) and Building Control Inspection Fees (£60k)	• Holding of vacancies
Major Projects	-113	-94	• Under-spend on net salaries (-£150k) • Over-spend on miscellaneous other costs (£54k)	
TOTAL	1,502	-65		

Place

Development

Key Budget Variances – Quarter 1

Development – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£32,288k	£37,343k	£5,055k
Income	(£23,163k)	(£27,737k)	(£4,574k)
TOTAL	£9,125k	£9,606k	£481k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Corporate Landlord	8,849	+185	• Over-spend on sites identified in 25-26 Budget Savings (£85k – Knowl House, The Hudawi Centre, Castle Grange APH, Claremont House) • Over-spend on Business Rates at other sites (£65k – various minor overspends) • Over-spend on water charges across portfolio (£65k) • Under-recovery of Timemaster income (£40k)	• Continuing to undertake emergency repairs / health and safety critical work only • Review internal Timemaster charging across whole of Property
Landbank	266	+354	• Over-spend on the Former Wetside (£165k - Rates (Annual) and service charges (Q1 & Q2)) • Over-spend on Riverbank Court prior to disposal (£20k) • Over-spend on Business Rates at other sites (£65k – various sites) • Over-spend on Security at Former Birkdale High School (£55k) • Over-spend on Timemaster Charges (£50k)	• Exploring option to demolish Former Birkdale High School
Capital Delivery	-1,493	-306	• Holding vacancies across team	

Place

Development

Key Budget Variances – Quarter 1

Development – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£32,288k	£37,343k	£5,055k
Income	(£23,163k)	(£27,737k)	(£4,574k)
TOTAL	£9,125k	£9,606k	£481k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Assets and Estates	-1,279	+328	• Net liability of holding remainder of Piazza Shopping Centre (£300k – Rates / Service Charges) • Over-spend on Timemaster Charges, Rates and Cleaning charges • Offset by forecasted over-recovery of Rental income across Commercial portfolio and forecasted over-recovery of disposals fees	• Review internal Timemaster charging across whole of Property
TOTAL	6,343	561		

Place

Highways & Streetscene

Key Budget Variances – Quarter 1

Highways & Streetscene – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£86,798k	£86,421k	(£377k)
Income	(£59,043k)	(£57,659k)	£1,384k
TOTAL	£27,755k	£28,762k	£1,007k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Parking	-5,070	+728	• Increase in bad debt £226k • Shortfall on Tariff Income £378k • Permits £61k • Supplies & services £101k • Fines £34k	• CEO vacancies not to be filled. • Deep dive review of Income streams ongoing to identify action plan for 25/26. • Tariff Income forecast based on 5% increased footfall.
Transport	2,595	+114	• Vacancies (£247k) • Pressure Fuel £198k	• Offset by savings on vacancies. Forecast to be filled by M6 • £340k budget provision made in 25/26 to reflect impact of ageing fleet
Waste Services	25,577	-234	• Employees (£934k) • Agency staff £872k • Supplies & Services(£79k) • External Income (£402) • Internal Income (£106k)	• Hired Vehicles -Capital strategy includes £26m of investment but lead time on larger vehicles. Budget provision in 25/26 £750k

Place

Highways & Streetscene

Key Budget Variances – Quarter 1

Highways & Streetscene – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£86,798k	£86,421k	(£377k)
Income	(£59,043k)	(£57,659k)	£1,384k
TOTAL	£27,755k	£28,762k	£1,007k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Parks & Greenspaces	2,579	-72	• Vacancies Employees (£331k) • Equip rent £70k • Professional Service £86k (Bowling greens) – previous agreed saving not delivered • Animal Care £43k	
Highways Services	183	+505	• Service Vacancies Employees (£3,351k) • Agency Staff £3,291k • Capital Recoveries Shortfall £101k • Highways Trading Account - £0 (Employees (£1,743K), Operational Costs (£1,518k) offset reduced trading income £3,261k) • Energy & Climate Change Savings Template 2023-2024 £215k • Growth & Regeneration Savings Template 2024-2025 £168k • School Crossing Patrols School Income £92k • Grounds Maintenance £200k • Reactive Maintenance Capitalisation (£241k)	
Adverse Weather	1,536	0		
Org Development & Planning	207	-18	• Vacancies Employees	
TOTAL	**27,606**	**1,023**		

Place

Environmental Strategy & Climate Change

Key Budget Variances – Quarter 1

Environmental Strategy & Climate Change – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£18,093k	£17,906k	(£187k)
Income	(£2,594k)	(£2,502k)	£92k
TOTAL	£15,499k	£15,404k	(£95k)

Service Area46k	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Directorate Programme Office	3,881	-110	• Employees (£110k)	Vacancies in Business support (£80k)
School Transport	10,526	+40		Additional budget £1.5m from Budget contingency reserve factored into forecast
TOTAL	**14,407**	**-70**		

Public Health and Corporate Resources

Strategy & Innovation

Key Budget Variances – Quarter 1

Strategy & Innovation – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£23,978k	£23,868k	(£110k)
Income	(£4,945k)	(£5,124k)	(£179k)
TOTAL	£19,033k	£18,744k	(£289k)

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
IT	12,048	+73	• Postage costs are a major pressure +£280k (savings target shortfall) • Vacancies offset the bulk of the pressure -£200k	Further work to be carried out with services to reduce postage and move customers to online alternatives
Policy, Partnerships and Corporate Planning	2,523	-174	• Vacancies	
Strategic Communications	1,343	-112	• Vacancies	
TOTAL	**15,914**	**-213**		

Public Health and Corporate Resources

Public Health & People

Key Budget Variances – Quarter 1

Public Health & People – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£42,038	£40,077k	(£1,961k)
Income	(£35,846k)	(£34,048k)	£1,798k
TOTAL	£6,192k	£6,029k	(£163k)

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Peoples Service	9,407	-163	• Vacancies	
TOTAL	9,407	-163		

Public Health and Corporate Resources

Governance & Commissioning

Key Budget Variances – Quarter 1

Governance & Commissioning – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£18,442k	£18,803k	£361k
Income	(£4,029k)	(£4,078k)	(£49k)
TOTAL	£14,413k	£14,725k	£312k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Legal Services	4,565	+513	• Recruitment issues have created vacancies that are offset by the use of locums. • External Solicitors, Counsel fees, and Legal expenses increased usage due to workloads (+£560k)	Work ongoing to improve recruitment of permanent staff and reduce usage of locums and other external services.
Risk	4,120	-185	• Vacancies	
TOTAL	**8,685**	**328**		

Public Health and Corporate Resources

Finance

Key Budget Variances – Quarter 1

Finance – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£14,538k	£14,376k	(£162k)
Income	(£4,963k)	(£4,867k)	£96k
TOTAL	£9,575k	£9,509k	(£66k)

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Welfare and Exchequer	6,636	-101	• Vacancies, offsetting Court Fee pressure	
TOTAL	6,636	-101		

Public Health and Corporate Resources

Benefit Payments

Key Budget Variances – Quarter 1

Benefit Payments – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£63,711k	£55,887k	(£7,824k)
Income	(£57,492k)	(£49,668k)	£7,824k
TOTAL	£6,219k	£6,219k	£0k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Housing Benefit Subsidy	6,219	0	No variation projected as Q1 subsidy deficit expected to reduce	As Ashenhurst comes online the current level of overspend is expected to reduce
TOTAL	6,219	0		

Public Health and Corporate Resources

Culture & Visitor Economy

Key Budget Variances – Quarter 1

Culture & Visitor Economy – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£40,404k	£40,225k	(£179k)
Income	(£34,368k)	(£34,260)	£108k
TOTAL	£6,036k	£5,965k	(£71k)

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
TOTAL				

Central

Key Budget Variances – Quarter 1

Central – Quarter 1				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£78,176k	£77,921k	(£255k)	(£255k)
Income	(£4,275k)	(£4,370k)	(£95k)	(£95k)
TOTAL	£73,901k	£73,551k	(£350k)	(£350k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Treasury Management	36,130	-350	-350	• Reduction in capital plan, and interest rates on borrowing to date lower than budgeted.	
TOTAL	36,130	-350	-350		

Analysis of Council Reserves (excl Statutory Reserves)

	Unallocated * £000	Earmarked £000	Total £000
At 1st April 2025	**(25,046)**	**(36,005)**	**(61,051)**
Planned Drawdowns from Earmarked Reserves			
Budgeted drawdown from Voluntary Revenue Provision reserve	-	5,985	5,985
Planned Contributions to Earmarked Reserves			
Transfer into Voluntary Revenue Provision reserve	-	(10,804)	(10,804)
Transfer into Transformation Reserve	-	(2,500)	(2,500)
Transfer into General Reserves	(1000)		(1,000)
	(26,046)	**(43,324)**	**(69,370)**
In Year Adjustments – Q1			
- Drawdown from Earmarked Reserves	-	1,993	1,993
- Drawdown from Transformation reserve	-	2,500	2,500
Balance of Reserves at 31st March 2026	**(26,046)**	**(38,831)**	**(64,877)**

*£16m Minimum Working Balance (£29m desirable).

Reserves Summary (£k)	Reserves 31st March 2025	Budget report Movements	Revised reserves 1st April 2025	Net Drawdowns at Q1	Reserves 31st March 2026
Ward Based Activity	(577)	-	(577)	-	(577)
Place Standard	(402	-	(402	-	(402)
Transformation	(1,480)	(2,500)	(3,980)	2,500	(1,480)
Development Funding	(914)	-	(914)	-	(914)
Revenue Grants	(17,998)	-	(17,998)	-	(17,998)
Stronger Families Grant	(688)	-	(688)	-	(688)
Other	(3,942)	-	(3,942)	-	(3,942)
Voluntary Revenue Provision	(6,504)	(4,819)	(11,323)	-	(11,323)
Strategic Budget Contingency Reserve	(3,500)	-	(3500)	1,993	(1,507)
Total Earmarked Reserves	(36,005)	(7,319)	(43,324)	4,493	(38,831)
Unallocated Balances	(25,046)	(1,000)	(26,046)	-	(26,046)
Total Useable Reserves	***(61,051)***	***(8,319)***	***(69,370)***	***4,493***	***(64,877)***
Statutory Reserves – Schools Balances	(11,119)	-	(11,119)	-	(11,119)
Statutory Reserves – Public Health	(896)	-	(896)	-	(896)
Grand Total All Reserves	***(73,066)***	***(8,319)***	***(81,385)***	***4,493***	***(76,892)***

Glossary of Reserves

Reserve	Description
Ward Based Activity	Set aside reflecting timing issues on ward-based activity spend commitments
Place Standard	Set aside to support the resourcing of emerging Place Standard action plans.
Apprenticeship Levy	Set aside to fund future payments into the Apprenticeship levy
Transformation	Set aside for strategic transformation developments over the next 12 to 24 months.
Demand Reserve	Set aside to mitigate the impact/volatility of a range of potential demand risks on statutorily provided service activity
Development Funding	To address the scale of development costs required to support targeted development and the upscaling of capital investment activity and major project activity over the MTFP.
Revenue Grants	Represents grants and contributions recognised in the Comprehensive Income and Expenditure Statement before expenditure has been incurred.
Stronger Families	Set aside reflecting timing issues on expenditure commitments supporting a range of Stronger Families activity, funded from external grant.
Other	A range of smaller reserves earmarked for specific purposes.
Specific Risk Reserves	Set aside to manage specific risks, including the potential risk of future loan defaults and managing the volatility surrounding treasury management budgets with respect to both potential changes in interest rates and the level of delivery of the capital plan.
WYCA Returned Levy	Returned levy income from WYCA that will be drawn down in 2024/25
Voluntary Revenue Provision	Voluntary overpayments of Minimum Revenue Provision (MRP).
Strategic Budget Contingency	To fund budget pressures that may arise due to delays in implementing savings plans and/or issues that have arisen post the agreement of the budget
Unallocated Reserves	General reserve to support Council working capital and cashflow requirements, and unbudgeted/financial resilience risks highlighted in the Council's corporate risk register.
Schools Balances	Statutory reserves relating to individual schools' balances/deficits carried forwards
Public Health	Timing issues on (statutorily ringfenced) Public Health grant spend commitments

HRA 2025/26 Forecast – Quarter 1

	Revised Budget £000	Forecast Q1 £000	Variance Q1 £000
Repairs & Maintenance	31,309	31,309	-
Housing Management	43,801	44,109	308
Property Services	(190)	(190)	-
Other Expenditure	34,616	34,601	(15)
Total Expenditure	**109,536**	**109,829**	**293**
Rent & Other Income	(109,536)	(109,648)	(112)
Total	**-**	**181**	**181**

HRA Reserves

	Balance at 31 March 2025 £000	Approved Movement in reserves £000	Balance at 31 March 2026 £000
Set aside for business risks	(10,800)	-	(10,800)
Repairs Reserve	(1,000)	-	(1,000)
Set aside to meet investment needs (as per HRA business plan)	(18,846)	16,342	(2,504)
Total	**(30,646)**	**16,342**	**(14,304)**

HRA

Key Budget Variances – Quarter 1

HRA – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£109,536k	£109,829k	£293k
Income	(£109,536k)	(£109,648k)	(£112k)
TOTAL	£0	£181k	£181k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Repairs and Maintenance	31,309	0	Breakeven position, majority of repairs funded through price per property. Pressure on Property Services to achieve target of £190k, due to the volume of repairs being reported.	£1m reserve set aside for repairs. Review of demand and consideration to fund additional costs from this reserve
Policy and Management	14,201	+65	Cost of repairs of £155k for properties used for temporary accommodation. Charged outside of ppp, more repairs going through due to use as TA, offset by underspends for the housing PFI scheme.	Review of repairs to be carried out to ensure these all relate to HRA.
H&N Staff and Management costs	17,649	+119	Underspend for housing management of £354k, an overspend for the Asset team of £159k and an underspend of £40k for H&N resources. Underspend of £46k for mileage, training, and other management costs. Reduction to staff capitalisation of £400k.	Assumption that staff costs of £1.9m would be capitalised. Due to the number of vacancies this is unlikely and so work ongoing to ensure the forecast assumption of £1.5m is correct.

HRA

Key Budget Variances – Quarter 1

HRA – Quarter 1			
	Revised Budget	Forecast	Variance
Expenditure	£109,536k	£109,829k	£293k
Income	(£109,536k)	(£109,648k)	(£112k)
TOTAL	£0	£181k	£181k

Service Area	Net Budget £000	Variance £000	Reason for Variance	Mitigating Actions
Property Services	-190	0	Assumed Property will achieve a surplus of £190k with turnover of £44m. Variances on Income £14k, Expenditure £93k and overheads -£107k.	Pressure has been raised about number of repair orders to be completed as part of PPP. Will be reviewed.
Community facilities	3,669	+88	• Forecast overspend of £315k for concierge, £280k for the termination of the Kings contract at Berry Brow. Offset by underspends. Expenditure side of the service charge recovery, shortfall of £2.4m comprised :- • Grounds maintenance - £1.3m • Communal lighting - £566k, • Concierge £408k (as above), • Sheltered housing - £156k	Charging of grounds maintenance £363k (Was £725k) put back to October 2025. Communal lighting charge from April 2026, Concierge ongoing charges to be recovered and legal dispute to be resolved. Sheltered housing to be charged from April 2026.
Other Finance Costs	34,616	-15	• Council tax on empty properties £285k • Investment income -£300k	Charges to properties to be demolished under review.
Income	-109,536	-112	• Net rental income -£213k. • Service charge and leaseholder income £109k • Other income -£8k.	Shortfall for grounds maintenance as due to charge from 1st April, delayed due to variation to tenancy agreement, to be charged from 1st October 2025.
TOTAL	-8,282	145		

Capital Headlines

- Capital budget £290.8m
- Reduction of budget since Financial Rollover Report £9.6m due to:
  - -£9.9m re-profile (General Fund -£7.2m, HRA -£2.7m)
  - +£0.3m Grant and S106 (General Fund)

  (further breakdown can be found in Appendix 3)
- Officers continue to review the multi-year capital plan and budget profiles (under FPR 3.8-3.14)

2025/26 Forecast – Quarter 1

	Rollover Budget £000	Re-profile / Change £000	Revised Budget £000	Actual Costs £000	Forecast M3 £000	Variance M3 £000
Children and Families	25,727	0	25,727	1,466	25,727	0
Adults and Health	4,223	0	4,223	371	4,223	0
Place	204,201	(6,686)	197,515	24,700	197,515	0
Public Health & Corporate Resources	18,848	(203)	18,645	458	18,645	0
General Fund	**252,999**	**(6,889)**	**246,110**	**26,995**	**246,110**	**0**
Housing Revenue Account	47,363	(2,679)	44,684	6,201	44,684	0
Council Total	**300,362**	**(9,568)**	**290,794**	**33,196**	**290,794**	**0**

Capital Spend to Date – Quarter 1

	Q1 Revised Capital Budget £'000	Actual Costs to Date £'000	Variance to Date (Actual Spend) £'000
Learning & Early Support	25,177	1,480	(23,697)
Resources, Improvement and Partnerships	550	(14)	(564)
Children and Families	**25,727**	**1,466**	**(24,261)**
Customers & Access Services	413	0	(413)
Learning Disabilities & MH	3,575	370	(3,205)
Adults Social Care Operation	235	1	(234)
Adults, Housing & Health	**4,223**	**371**	**(3,852)**

Capital Spend to Date – Quarter 1

	Q1 Revised Capital Budget £'000	Actual Costs to Date £'000	Variance to Date (Actual Spend) £'000
Skills & Regeneration	51,171	6,455	(44,716)
Development	108,220	12,786	(95,434)
Highways & Streetscene	36,608	5,168	(31,440)
Environmental Strategy & Climate Change	1,516	291	(1,225)
Place	**197,515**	**24,700**	**(172,815)**
Strategy & Innovation	17,736	430	(17,306)
Service Direct Reports	0	(16)	(16)
Culture & Visitor Economy	909	44	(865)
Public Health & Corporate Resources	**18,645**	**458**	**(18,187)**
Housing Revenue Account	**44,684**	**6,201**	**(38,483)**

Refreshed Capital Plan 2025/26-2031/32 – Quarter 1

	2025/26 £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000	2029-32 £'000	Total £'000
Children and Families	25,727	29,573	21,610	3,827	2,750	**83,487**
Adults and Health	4,223	8,424	3,031	0	0	**15,678**
Place	197,515	222,487	121,792	77,907	144,195	**763,896**
Public Health & Corporate Resources	18,645	11,681	11,911	11,569	11,100	**64,906**
General Fund	**246,110**	**272,165**	**158,344**	**93,303**	**158,045**	**927,967**
Housing Revenue Account	**44,684**	**65,565**	**70,589**	**54,502**	**109,874**	**345,214**
Council Total	**290,794**	**337,730**	**228,933**	**147,805**	**267,919**	**1,273,181**

The capital plan is updated to take account capital slippage totalling £9,568k from 2025/26 into 2026/27 onwards and changes in the overall estimated levels of resources available of +£406k across all years in total.

Kirklees COUNCIL

Refreshed Capital Plan 2025/26-2031/32 – Quarter 1 Funding Change

	2025/26 £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000	2029-32 £'000	Total £'000
ROLLOVER CAPITAL PLAN	**300,362**	**328,366**	**228,697**	**147,752**	**267,598**	**1,272,775**
GF Re-profiling (Borrowing)	(4,202)	3,921	229	53	(1)	0
GF Re-profiling (Grant/S106)	(672)	672	0	0	0	0
GF Re-profiling (Receipts)	(2,357)	2,357	0	0	0	0
GF Grant Addition	282	0	0	0	0	282
GF S106 Addition	60	57	7	0	0	124
General Fund Changes	**(6,889)**	**7,007**	**236**	**53**	**(1)**	**406**
HRA Borrowing Re-profile	(1,462)	1,140	0	0	0	(322)
HRA Reserves Re-profile	(1,217)	1,217	0	0	322	322
Housing Revenue Changes	**(2,679)**	**2,357**	**0**	**0**	**322**	**0**
Total Change	**(9,568)**	**9,364**	**236**	**53**	**321**	**406**
Q1 REVISED CAPITAL PLAN	**290,794**	**337,730**	**228,933**	**147,805**	**267,919**	**1,273,181**

Prudential & Treasury Management Indicators

Quarter 1 2025-26

Kirklees COUNCIL

Prudential Indicators

- The Council measures and manages its capital expenditure, borrowing and commercial and service investments with reference to the following indicators.

- It is now a requirement of the CIPFA Prudential Code that these are reported on a quarterly basis.

- The figures for 25/26 are forecast, the 26/27 and 27/28 figures are budgeted figures approved from the 25/26 budget. The exception is the Liability Benchmark.

- Information contained includes:
- Capital Expenditure
- Capital Financing Requirement
- Gross Debt and the Capital Financing Requirement
- Debt and the Authorised Liming and Operational Boundary
- Net Income from Commercial and Service Investments to Net Revenue Stream
- Proportion of Financing Costs to Net Revenue Stream

Prudential Indicators

Capital Expenditure

- The Council has undertaken and is planning capital expenditure as summarised in the table below.
- The main General Fund capital projects for 25/26 include spend on the Cultural Heart, Town Centre Action Plans, Highways baseline schemes, and major projects for both the West Yorkshire plus Transport Schemes, Transforming Cities Fund and Heritage Action Zone.
- HRA capital expenditure is recorded separately and includes supporting a Council House Building and Re-Modelling programme, Building Safety, Housing Growth and replacement IT system
- The 25/26 forecast includes revised spend rollover, while 26/27 and 27/28 budget figures are those approved as part of the 25/26 Budget Report

	2024/25 £m actual	2025/26 £m forecast	2026/27 £m budget	2027/28 £m budget
General Fund	105.6	246.1	212.6	102.5
Housing Revenue Account	35.0	44.7	71.1	63.0
Total Capital expenditure	**140.6**	**290.8**	**283.7**	**165.5**

Prudential Indicators

Capital Financing Requirement

- The Council's cumulative outstanding amount of debt finance is measured by the Capital Financing Requirement (CFR). This increases with new debt-financed capital expenditure and reduces with MRP, loan repayments and capital receipts used to replace debt. The actual CFR is calculated on an annual basis.
- The effect from the change in the accounting for leases has not yet been reflected in the CFR.

	2024/25 £m actual	2025/26 £m forecast	2026/27 £m budget	2027/28 £m budget
General Fund	732.3	819.6	1,046.6	1,099.8
Housing Revenue Account	207.0	203.2	206.5	203.3
Total Capital Financing Requirement	**939.3**	**1,022.8**	**1,253.1**	**1,303.1**

Prudential Indicators

Gross Debt and the Capital Financing Requirement

- Statutory guidance is that debt should remain below the capital financing requirement, except in the short term. The Council has complied and expects to continue to comply with this requirement in the medium term as is shown below.

	2024/25 actual £m	2025/26 forecast £m	2026/27 budget £m	2027/28 budget £m	Debt at 30.06.2025 £m
Debt (incl. PFI & leases)	864.5	957.8	1,176.1	1,226.1	879.6
Capital Financing Requirement	839.3	1,022.8	1,253.1	1,303.1	

Prudential Indicators

Debt and the Authorised Limit and Operational Boundary

- The Council is legally obliged to set an affordable borrowing limit (also termed the Authorised Limit for external debt) each year. In line with statutory guidance, a lower Operational Boundary is also set as a warning level should debt approach the limit.
- Since the operational boundary is a management tool for in-year monitoring it is not significant if the boundary is breached on occasions due to variations in cash flow, and this is not counted as a compliance failure. Total debt did not go above the operational boundary.

	Maximum debt Q1 2025/26	Debt at 30.06.25	2025/26 Authorised Limit	2025/26 Operational Boundary	Complied
Borrowing	793.8	789.1	1,024.7	1,004.7	Yes
PFI and Finance Leases *	90.5	90.5	91.6	86.6	Yes
Total debt	**884.3**	**879.6**	**1,116.3**	**1,091.3**	

Prudential Indicators

Net Income from Commercial and Service Investments to Net Revenue Stream

- The Council's income from commercial and service investments as a proportion of its net revenue stream has been and is expected to be as indicated below.

	2024/25 actual £m	2025/26 actual £m	2026/27 budget £m	2027/28 budget £m
Total net income from service and commercial investments	-1.2	-2.0	-2.0	-2.0
Proportion of net revenue stream	-0.3%	-0.5%	-0.5%	-0.5%

Prudential Indicators

Proportion of Financing Costs to Net Revenue Stream

- Although capital expenditure is not charged directly to the revenue budget, interest payable on loans and MRP are charged to revenue.
- The net annual charge is known as financing costs; this is compared to the net revenue stream, ie the amount funded from Council tax, Business rates and general government grants.

	2024/25 actual	2025/26 forecast	2026/27 budget *	2027/28 budget *
General Fund - Financing costs (£m)	52.1	54.5	52.9	60.2
General Fund – Proportion of net revenue stream (with reduced MRP)	9.8%	9.7%	12.7%	13.8%
General Fund – Proportion of net revenue stream (full MRP)	13.8%	13.7%	12.7%	13.8%
HRA – Financing costs (£m) – (including depreciation)	34.8	34.8	35.3	36.3
HRA - Proportion of net revenue stream	32.6%	32.6%	31.5%	31.6%

* per 25/26 capital strategy and budget

Treasury Management Indicators

- **Indicators include**:
    - Liability Benchmark
    - Maturity Structure of Borrowing
    - Long Term Treasury Management Investment
    - Interest Rate Exposures

Treasury Management Indicators

Liability Benchmark

- This indicator compares the Council's actual existing borrowing against a liability benchmark that has been calculated to show the lowest risk level of borrowing. The liability benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future, and so shape its strategic focus and decision making. It represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments at the minimum level of £30.0 million required to manage day-to-day cash flow.

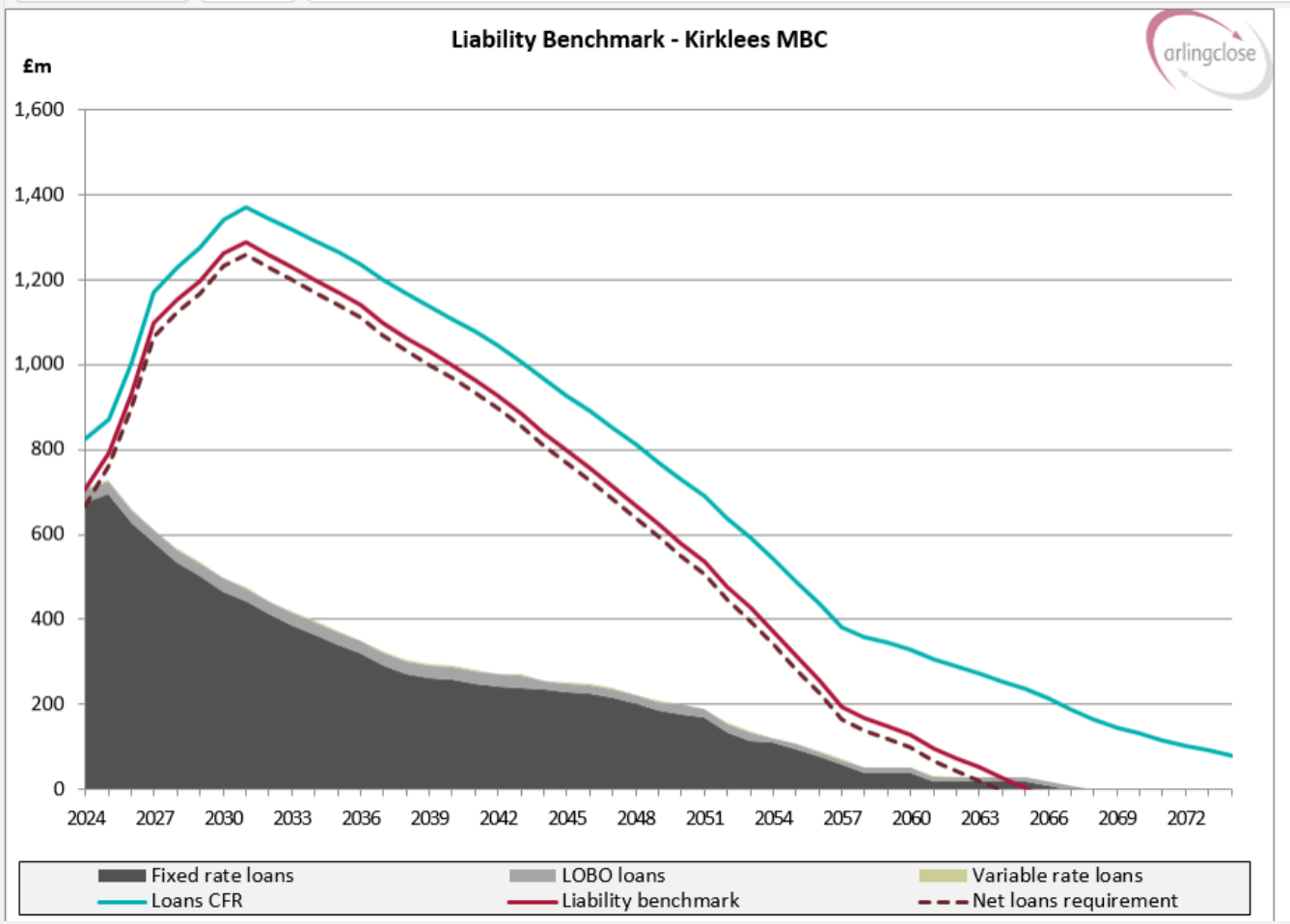
- Following on from the medium-term forecast below, the long-term liability benchmark includes capital expenditure funded by borrowing of £111.4 million in 2025-26, minimum revenue provision based on assets lives and reduction in balance sheet resources of £19.3 million.

	31.03.25 actual £m	31.03.26 forecast £m	31.03.27 forecast £m	31.03.28 forecast £m
Loans CFR	**849.7**	**940.2**	**1,096.5**	**1,187.6**
Less: Balance sheet resources	134.3	95.0	96.0	96.0
Net loans requirement	**715.4**	**845.2**	**1,000.5**	**1.091.6**
Plus: Estimated Liquidity allowance	58.6	30.0	30.0	30.0
Liability benchmark	**774.0**	**875.2**	**1,030.5**	**1,121.6**
Existing borrowing - committed	**774.0**	**751.8**	**673.4**	**607.5**

Treasury Management Indicators

Liability Benchmark

The total liability benchmark is shown in the chart, together with the maturity profile of the Council's existing borrowing. The red line is the liability benchmark reaching a peak in 2031 highlighting the gap between current borrowing identified in grey, which is reducing over time with repayments, and the additional borrowing required to fund the capital plan.



Kirklees COUNCIL

Treasury Management Indicators

Maturity Structure of Borrowing

- This indicator is set to control the Authority's exposure to refinancing risk. The upper and lower limits on the maturity structure of all borrowing were:

	Upper limit	Lower limit	31.06.25 actual	Complied
Under 12 months	25%	0%	10%	Yes
12 months and within 24 months	25%	0%	9%	Yes
24 months and within 5 years	60%	0%	20%	Yes
5 years and within 10 years	80%	0%	18%	Yes
10 years and above	100%	20%	43%	Yes

- Time periods start on the first day of each financial year. The maturity date of borrowing is the earliest date on which the lender can demand repayment. LOBO options of £30.9 million have a potential repayment date during 2025-26 and have been included in the under 12 months line.

Treasury Management Indicators

Long term Treasury Management Investments

- The purpose of this indicator is to control the Council's exposure to the risk of incurring losses by seeking early repayment of its investments. The prudential limits on the long-term treasury management limits are:

	2024/25	2025/26	2026/27	No fixed date
Limit on principal invested beyond year end	n/a	n/a	n/a	n/a
Actual principal invested beyond year end	£10.0m	£10.0m	£10.0m	£10.0m
Complied	Yes	Yes	Yes	Yes

- Long-term investments with no fixed maturity date include strategic pooled funds, real estate investment trusts and directly held equity but exclude money market funds and bank accounts with no fixed maturity date as these are considered short-term.

Treasury Management Indicators

Interest Rate Exposures

For context, the changes in interest rates during the quarter were:

	01/04/25	30/06/25
Bank Rate	4.50%	4.25%
1-year PWLB certainty rate, maturity loans	4.82%	4.50%
5-year PWLB certainty rate, maturity loans	4.94%	4.70%
10-year PWLB certainty rate, maturity loans	5.38%	5.27%
20-year PWLB certainty rate, maturity loans	5.88%	5.88%
50-year PWLB certainty rate, maturity loans	5.63%	5.71%

Monthly 2025/26 Budget Savings Delivery Update Q1 (month 3)

Cabinet 9th September 2025

Guidance – 25/26 savings reporting

- Savings reporting to include the following categories of savings:
  - Savings from the 25/26 annual budget (for 25/26)
  - Savings from the 24/25 annual budget (to be delivered in 25/26)
  - Savings from the 24/25 annual budget (which were to be delivered in 24/25 but have still not been completed / delivered yet)

- 'Significant Issue' as a RAG category has now been removed for 2025/26

- 'YTD' column must be filled out. If you do not have information available for this column – please state reasons why

- If savings are being delivered in a way that is different to the originally described plan, please state that achievement of the saving is being delivered via a 'Plan B' in the mitigating actions column

- Conservative party amendments???

Projected 2025/26 savings delivery summary

	2025/26				
Directorate	**Total budgeted savings £000**	**25/26 YTD Delivered £000**	**25/26 Latest Projection £000**	**25/26 Projected Variance £000**	**RAG Rating**
Children and Families	**(3,860)**	**(2,027)**	**(2,838)**	**1,022**	**On Track**
Adults and Health	**(14,256)**	**(3,760)**	**(14,095)**	**161**	**On Track**
Place	**(3,756)**	**(645)**	**(3,454)**	**302**	**On Track**
Public Health and Corporate Resources	**(2,981)**	**(2,280)**	**(2,701)**	**280**	**On Track**
Central Budgets	**(2,000)**	**(500)**	**(2,000)**	**0**	**On Track**
All Directorates	**(26,853)**	**(9,212)**	**(25,088)**	**1,765**	
Housing Revenue Account	(3,785)	(1,190)	(3,423)	362	**On Track**
Total Directorates + HRA	**(30,638)**	**(10,402)**	**(28,511)**	**2,127**	

2025/26 Savings Delivery Monitoring RAG Summary (all directorates & HRA)

	25/26				
Proposals (RAG rating)	**Number of proposals**	**Change from previous**	**Budgeted Savings £000**	**Latest Projection £000**	**Projected Variance £000**
Complete – proposal has been fully delivered and full savings will be realised	**10**		**(2,422)**	**(2,422)**	**0**
On track – high level of confidence that full savings will be delivered	**49**		**(22,304)**	**(22,304)**	**0**
May slip – a risk that full savings will not be realised, but mitigating actions are in place. High level of confidence that mitigating actions will bring this back on track.	**11**		**(2,139)**	**(2,017)**	**122**
Slipped – a risk that full savings will not be realised, but mitigating actions are in place. Lower level of confidence that mitigating actions will bring this back on track.	**10**		**(3,773)**	**(1,768)**	**2,005**
TOTAL	**80**		**(30,638)**	**(28,511)**	**2,127**

Changes since previous reporting period - Summary	**Number of proposals**
Proposals moved in positive direction (e.g. from Red to Amber)	**n/a**
Proposals moved in a negative direction (e.g. from Amber to Red)	**n/a**

Projected savings slippage (incl. savings from previous years)

	2025/26		
Directorate	25/26 Projected Variance £000	Previous Year Slipped Savings Projected Variance £000	Total Variance due to Savings Slippage £000
Children and Families	1,022	0	1,022
Adults and Health	161	1,832	1,993
Place	302	713	1,015
Public Health and Corporate Resources	280	0	280
Central Budgets	0	0	0
All Directorates	1,765	2,545	4,310
Housing Revenue Account	362	0	362
Total Directorates + HRA	2,127	2,545	4,672

Monthly Savings Monitoring – Children and Families

Q1 (month 3)

Savings Delivery Monitoring – Children and Families (New 25/26 savings)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
CF2501	Resources, Improvements & Partnerships	Mainstream MST approaches in Family Help	(589)	(589)	(589)	0	On Track	
CF2502	Family Support and Child Protection	Review Family Help Resources	(199)	(199)	(199)	0	On Track	
CF2504	Resources, Improvements & Partnerships	Rationalise Capacity in the LADO service	(60)	(60)	(60)	0	On Track	
CF2505	Resources, Improvements & Partnerships	C&K Careers & Children's commissioning contracts	(150)	0	(150)	0	On Track	
CF2505	Learning and Early Support	C&K Careers & Children's commissioning contracts	(150)	(150)	(150)	0	On Track	
CF2506	Learning and Early Support	Rationalise Early Years Functions	(200)	(200)	(200)	0	On Track	
CF2507	Learning and Early Support	Rationalisation of Community Hub Coordinators	(465)	(343)	(343)	112	May Slip	Some legacy staff remain on payroll to mid July, so £112k pressure will remain in 25/26, unless savings arise to offset
CF2508	Resources, Improvements & Partnerships	Mainstream the compliments and complaints function	(161)	0	(161)	0	On Track	Awaiting direction from service on how saving will be achieved
CF2509	Resources, Improvements & Partnerships	Reduction in residential out of area placements	(900)	0	0	900	Slipped	Unlikely to be achieved in current financial year
CF2510	Family Support and Child Protection	Review the way Children with disabilities are supported in the community	(500)	0	(500)	0	On Track	
TOTAL CHILDREN AND FAMILIES NEW SAVINGS			**(3,374)**	**(1,541)**	**(2,352)**	**1,022**		

Savings Delivery Monitoring – Children and Families (25/26 savings approved in prior years)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
24CF1	Family Support & Child Protection	Integration for Support to Keep Families Together	(87)	(87)	(87)	0	On Track	
24CF1	Learning and Early Support	Integration for Support to Keep Families Together	(345)	(345)	(345)	0	On Track	
24CF23	Learning and Early Support	Virtual School for Children Looked After – embedding of additional duties	(54)	(54)	(54)	0	On Track	
TOTAL CHILDREN AND FAMILIES PRIOR YR APPROVED			**(486)**	**(486)**	**(486)**	**0**		

TOTAL CHILDREN AND FAMILIES 25/26 SAVINGS			**(3,860)**	**(2,027)**	**(2,838)**	**1,022**		

Monthly Savings Monitoring – Adults and Health

Q1 (month 3)

Savings Delivery Monitoring – Adults and Health (New 25/26 savings)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
AH2501	Learning Disabilities & Mental Health	Transfer the dementia long stay residential homes owned by the Council to a private sector operator	(645)	0	(484)	161	Slipped	Delay due to judicial review - ongoing.
AH2504	Adults Sufficiency	Kirklees Better Outcomes Partnership reductions in contract value	(500)	(500)	(500)	0	On Track	New contract level as at April - achieved.
AH2505	Learning Disabilities & Mental Health	Staffing – Review of turnover/vacancy factor allowances	(427)	(107)	(427)	0	On Track	Budgets reviewed and reset - will be achieved through the year
AH2505	Older People & Physical Disabilities	Staffing – Review of turnover/vacancy factor allowances	(108)	(27)	(108)	0	On Track	Budgets reviewed and reset - will be achieved through the year
TOTAL ADULTS AND HEALTH NEW SAVINGS			**(1,680)**	**(634)**	**(1,519)**	**161**		

Savings Delivery Monitoring – Adults and Health (25/26 savings approved in prior years)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
24AH2	Learning Disabilities & Mental Health	Explore the future of learning disabilities Supported Living Schemes provided by the Council	(252)	0	(252)	0	On Track	
24AH7	Older People & Physical Disabilities	Kirklees Integrated Community Equipment Service (KICES)	(400)	(400)	(400)	0	Complete	
24AH9	Older People & Physical Disabilities	Staffing Savings across Adults and Health	(70)	(18)	(70)	0	On Track	
24AH9	Learning Disabilities & Mental Health	Staffing Savings across Adults and Health	(270)	(68)	(270)	0	On Track	
24AH13	Learning Disabilities & Mental Health	Contracting & Commissioning Workstream – Day Service Framework	(250)	0	(250)	0	On Track	
24AH13	Learning Disabilities & Mental Health	Contracting & Commissioning Workstream – Respite Framework	(500)	0	(500)	0	On Track	
24AH13	Learning Disabilities & Mental Health	Contracting & Commissioning Workstream – Domiciliary Care Contract Improvements	(1,000)	0	(1,000)	0	On Track	
24AH13	Learning Disabilities & Mental Health	Contracting & Commissioning Workstream – Review of Care Homes Market	(2,000)	0	(2,000)	0	On Track	
24AH13	Learning Disabilities & Mental Health	Contracting & Commissioning Workstream - Contracts	(40)	(40)	(40)	0	On Track	
24AH14a	Learning Disabilities & Mental Health	Reviewing Shared Lives Provision to mitigate costs elsewhere in Adult Social Care.	(447)	0	(447)	0	On Track	
24AH17	Communities and Access Services	Community Based Integrated Library and customer service functions & assets	(110)	(28)	(110)	0	On Track	
24AH23	Learning Disabilities & Mental Health	Ings Grove – exploring partnership delivery options	(1,099)	(1,099)	(1,099)	0	Complete	

Savings Delivery Monitoring – Adults and Health (25/26 savings approved in prior years)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
NEWAD1	Communities and Access Services	Integrated Community and Access Model	(272)	(191)	(272)	0	On Track	
NEWAD2a	Older People & Physical Disabilities	Confident and Consistent Practice – Targeted Review (OP/PD)	(850)	(320)	(850)	0	On Track	
NEWAD2b	Learning Disabilities & Mental Health	Confident and Consistent Practice – Targeted Review (LD/MH)	(1,250)	0	(1,250)	0	On Track	
NEWAD2c	Older People & Physical Disabilities	Confident and Consistent Practice – Financial Delegation Scheme	(3,000)	(840)	(3,000)	0	On Track	
NEWAD2d	Older People & Physical Disabilities	Confident and Consistent Practice – Temporary Increases	(250)	0	(250)	0	On Track	
NEWAD2e	Older People & Physical Disabilities	Confident and Consistent Practice – Direct Payments	(232)	0	(232)	0	On Track	
NEWAD2f	Older People & Physical Disabilities	Confident and Consistent Practice – Transitions Pathways	(160)	0	(160)	0	On Track	
NEWAD3	Learning Disability & Mental Health	Work with wider health/care system to reflect cost and design	(124)	(124)	(124)	0	On Track	
TOTAL ADULTS AND HEALTH PRIOR YEAR APPROVED			**(12,576)**	**(3,127)**	**(12,576)**	**0**		
TOTAL ADULTS AND HEALTH 25/26 SAVINGS			**(14,256)**	**(3,760)**	**(14,095)**	**161**		

Monthly Savings Monitoring – Place

Q1 (month 3)

Savings Delivery Monitoring – Place (New 25/26 savings)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
AH2501	Development	Corporate Landlord savings re Adults Dementia Proposal	(220)	0	(110)	110	Slipped	
PL2503	Development	Reduction in grounds maintenance	(125)	0	(125)	0	May Slip	Pressure in Trees Maintenance
PL2504	Development	Asset transfer of the Hudawi Centre	(75)	0	(19)	56	Slipped	Asset likely to be held until December 2025
PL2505	Development	Housing Growth – Maximising Existing Funding	(180)	0	(180)	0	Slipped	Offset by Salaries under-spend in 25-26
PL2506	Development	Housing - Delete Vacant posts	(80)	0	(80)	0	On Track	
PL2508	Development	TransPennine Rail Upgrade Income	(150)	0	(150)	0	On Track	
PL2509	Development	Asset Strategy - Delete Vacant posts	(100)	(100)	(100)	0	On Track	Forecasted to achieve under-spend on salaries
PL2510	Development	Major Projects Team - Charging to Capital	(50)	0	(50)	0	On Track	On track - not Major Projects Team - this relates to Internal Charging in Property
PL2511	Development	Knowl House – Mothball	(72)	0	(36)	36	Slipped	Asset being held
PL2512	Environmental Strategy & Climate Change	School Transport – Additional Transformation Savings beyond existing	(156)	0	(156)	0	Slipped	

Savings Delivery Monitoring – Place (New 25/26 savings)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
PL2514	Environmental Strategy & Climate Change	Changes to night-time noise service	(70)	(70)	(70)	0	Complete	
PL2515	Environmental Strategy & Climate Change	Electric Vehicle Salary Sacrifice Scheme – NI savings	(89)	0	(89)	0	May Slip	17/07/2025 Scheme has not gone live yet . Proposed date Sept 25
PL2516	Environmental Strategy & Climate Change	Review of council wide support services	(400)	(146)	(400)	0	May Slip	The remaining amount of this saving is organisational wide. Meeting to be held 22/07/2025 to discuss
PL2524	Highways & Streetscene	Trade Waste Charge Review	(95)	(95)	(95)	0	Complete	
PL2525	Highways & Streetscene	Highways & Streetscene – Charges to Capital	(155)	0	(155)	0	On Track	
PL2528	Highways & Streetscene	Efficiencies Related to Council Service Cars and Bookable Pool Cars	(100)	0	(0)	100	Slipped	This is unachievable without removing all remaining pool & service cars which would have a critical impact on children & adult services
PL2529	Skills & Regeneration	Review of management across the service	(155)	0	(155)	0	On Track	
PL2531	Skills & Regeneration	Reduction in Support to Business – match funding reduction	(50)	0	(50)	0	On Track	
PL2532	Skills & Regeneration	Major Projects income	(50)	0	(50)	0	On Track	
PL2533	Development	Utilisation of Neighbourhood capital grant funding	(40)	0	(40)	0	May Slip	Offset by Salaries under-spend in 25-26
TOTAL PLACE NEW SAVINGS			**(2,412)**	**(411)**	**(2,412)**	**302**		

Savings Delivery Monitoring – Place (25/26 savings approved in prior years)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
24GR4	Development	Corporate Landlord-Proportionate reduction in staffing post asset rationalisation	(510)	0	(510)	0	On Track	
24EC19	Highways & Streetscene	Household Waste Recycling Centre Opening Hours Review	(134)	(134)	(134)	0	Complete	
24EC14 & NEWEN2	Environmental Strategy & Climate Change	School Transport Service Transformation/ Change to policy and operational delivery to reduce costs	(600)	0	(600)	0	May slip	Significant demand pressure. Additional budget given £1.5m
NEWEN7	Highways & Streetscene	Waste Strategy Efficiencies	(100)	(100)	(100)	0	Complete	
TOTAL PLACE PRIOR YEAR APPROVED			**(1,439)**	**(329)**	**(1,439)**	**0**		
TOTAL PLACE 25/26 SAVINGS			**(3,756)**	**(645)**	**(3,454)**	**302**		

Savings Delivery Monitoring – HRA (New 25/26 savings)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
HNHMP1a	Housing Management and Partnerships	Service Charge Review – Communal Grounds Maintenance	(725)	0	(363)	362	Slipped	Increase in service charge income for grounds maintenance pushed back from 1st April to 1st October. Being funded from HRA savings.
HNHMP1b	Housing Management and Partnerships	Service Charge Review – Communal Cleaning	(20)	0	(20)	0	May Slip	Communal cleaning has a forecast overspend but savings could be achieved from overall service charge recovery.
HNHMP2a	Housing Management and Partnerships	Personal Heat and Water Charges	(573)	(143)	(573)	0	On Track	
HNHMP2b	Housing Management and Partnerships	Service Charge Review	(267)	(67)	(267)	0	On Track	
HNHMP3	Housing Management and Partnerships	Housing Management Savings – Staffing	(80)	(80)	(80)	0	On Track	
HNHMP4	Housing Management and Partnerships	Council Tax Charges on Empty Properties	(50)	0	(50)	0	May Slip	Under review as to whether council tax should be charged. In contact with the valuation office.
HNHMP5	Housing Management and Partnerships	Move to decorating vouchers for works to void properties	(500)	(125)	(500)	0	On Track	
HNHMP8	Housing Management and Partnerships	Review of concierge service	(250)	0	(250)	0	May Slip	Termination costs of estimated £280k might impact on making these savings
HNASS01	Asset Management and Development	Reduction of void rent loss with improved relet days	(255)	0	(255)	0	Slipped	Reduction in turnaround time is improving but void rent loss is still overbudget, properties kept empty for decants etc. One-off virement has funded this year.

Savings Delivery Monitoring – HRA (New 25/26 savings)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
HNASS02	Asset Management and Development	Review of staffing structure	(100)	0	(100)	0	May Slip	Saving from the Asset team is unlikely due to a number of interims in post but savings could be achieved across the service.
HNASS05	H&N Assets and Building Safety	Reduction in interest costs	(775)	(775)	(775)	0	On Track	
HNPTY01	Property Services	Overhead Efficiency	(190)	0	(190)	0	On Track	
TOTAL HRA			**(3,785)**	**(1,190)**	**(3,423)**	**362**		

Monthly Savings Monitoring – Public Health and Corporate Resources

Q1 (month 3)

Savings Delivery Monitoring – Public Health and Corporate Resources (New 25/26 savings)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
CR2501	Culture & Visitor Economy	Review of Fees and Charges across C&VE & restructuring of the Town Halls workforce	(220)	(220)	(220)	0	On Track	New charges introduced, but achievement will depend on maintaining sales. Salary saving ok.
CR2503	Culture & Visitor Economy	Annual Increase in Bereavement Services fees and charges	(60)	(60)	(60)	0	On Track	New charges introduced, but achievement will depend on maintaining sales
CR2504	Strategy & Innovation	Reductions in spend on IT contracts	(100)	(25)	(100)	0	On Track	
CR2505	Strategy & Innovation	Vacancy Management – Strategy & Innovation	(234)	(234)	(234)	0	Complete	
CR2507	Governance & Commissioning	Review of Governance Service & Structure	(75)	(75)	(75)	0	Complete	
CR2508	Public Health & People	Review of People Service	(200)	(200)	(200)	0	Complete	
AH2502	Public Health & People	Other minor savings variations of <£50k	(20)	(20)	(20)	0	On Track	Adjustment done as part of move
PL2502	Culture & Visitor Economy	Reduction in cleaning to service delivery buildings excluding care homes	(587)	(587)	(587)	0	On Track	Budget adjustments are complete but practicality of saving to be monitored
CB2502	Strategy & Innovation	Conservative Amendment Savings - Reductions in Communications Activity	(19)	(5)	(19)	0	On Track	
TOTAL CORPORATE NEW SAVINGS			**(1,515)**	**(1,426)**	**(1,515)**	**0**		

Savings Delivery Monitoring – Public Health and Corporate Resources
(25/26 savings approved in prior years)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
24AH18	Public Health & People	Bring all customer contact centre activity together across the Council	(175)	(175)	(175)	0	On Track	Adjustments done as part of move
24AH19	Culture & Visitor Economy	Review of Registration Service Delivery Model and fees and charges	(295)	0	(295)	0	On Track	Further work required to understand saving implications as service only just moved under C&VE
24CS6	Finance	Vacancy Management in Welfare & Exchequer service	(101)	(101)	(101)	0	On Track	
24CS7	Finance	Financial Management – Increased Vacancy Factor	(50)	(13)	(50)	0	On Track	
24CS8	Public Health & People	Review of people Services Operating Model	(15)	(15)	(15)	0	Complete	
24EC18	Culture & Visitor Economy	Increase to Bereavement Fees and Charges	(65)	(65)	(65)	0	On Track	New charges introduced, but achievement will depend on maintaining sales
24EC20	Culture & Visitor Economy	Caretaking & Cleaning - Increased charges to schools	(200)	(200)	(200)	0	On Track	New charges introduced, but achievement will depend on maintaining sales
24EC27	Culture & Visitor Economy	Increase Commercial income	(20)	(20)	(20)	0	On Track	New charges introduced, but achievement will depend on maintaining sales
24CS13	Strategy & Innovation	Efficiencies relating to Information Technology	(445)	(165)	(165)	280	Slipped	Postage costs +£280k

Savings Delivery Monitoring – Public Health and Corporate Resources
(25/26 savings approved in prior years)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
NEWCS3/4	Strategy & Innovation	Vacancy Management	(100)	(100)	(100)	0	On Track	
TOTAL CORPORATE PRIOR YEAR APPROVED			**(1,466)**	**(854)**	**(1,186)**	**280**		
TOTAL CORPORATE 25/26 SAVINGS			**(2,981)**	**(2,280)**	**(2,701)**	**280**		

Monthly Savings Monitoring – Central Budgets

Q1 (month 3)

Savings Delivery Monitoring – Central Budgets (New 25/26 savings)

Ref	Service Area	Proposal Title	25/26 budgeted savings £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Variance £000	RAG Rating	Update/ Mitigating actions
CB2501	Treasury Management	Treasury Management Savings - from review of Capital Plan	(2,000)	(500)	(2,000)	0	On Track	
TOTAL CENTRAL NEW SAVINGS			**(2,000)**	**(500)**	**(2,000)**	**0**		

Monthly Savings Monitoring – Savings Slipped from Previous Years

Q1 (month 3)

Savings Delivery Monitoring – Slipped Savings from previous years

Ref	Directorate	Proposal Title	Budgeted Saving £000	25/26 YTD Delivered £000	25/26 Latest Proj'n £000	25/26 Projected Slippage £000	Update/ Mitigating actions
24AH28	Adults	Increasing the collection of social care income	(2,627)	0	(795)	1,832	Only partial achievement
EN3	Place	School Crossing Patrols School Income	(92)	0	0	92	Unlikely to be achieved in current financial year
24GR8	Place	Potential rent increase for temporary accommodation	(200)	0	0	200	
24GR14	Place	Efficiencies / Directorate Wide	(335)	0	0	335	
24EC5 (part)	Place	Bowling Greens	(86)	0	0	86	
TOTAL SLIPPED SAVINGS FROM PREVIOUS YEARS			**(3,340)**	**0**	**(795)**	**2,545**	

Breakdown of Outturn Capital Budget Changes since Outturn Report Appendix 3

	£'000	£'000	£'000
FINANCIAL OUTTURN REPORT BUDGET			**300,362**
Increase in Grants/Contributions/Other			
Place			
Climate Emergency - Green Travel (Grant)	282		
Play Strategy (S106), Lees Holme Park Cluster Refurbishment	60		
Change in Grants/Contributions/RCCO/Other		342	
Re-profiling / Virements between Years			
General Fund:			
Place			
Housing Growth, Site Development	(257)		
Dewsbury Town Centre	(4,518)		
Highways	(2,500)		
Bereavement	(202)		
Parks & Open Spaces	246		
General Fund Re-profile	**(7,231)**		
Housing Revenue Account:			
Housing Capital Plan	(400)		
Building Safety	143		
Six Storey Blocks	(600)		
Low Rise Blocks	(1,500)		
Fuel Poverty	(£322)		
Housing Revenue Account Re-profile	**(2,679)**		
Total Re-profiling		**(9,910)**	
Total Change in Budget			**(9,568)**
Q1 CAPITAL BUDGET			**290,794**

Breakdown of Outturn Capital Budget Changes since Outturn Report Appendix 3

	£'000	£'000
Change in Budget - Funding Breakdown:		
General Fund		
Borrowing	(3,999)	
Grants	(658)	
S106	125	
Receipts/Capital Allowances	(2,357)	
Housing Revenue Account		
Borrowing	(1,462)	
Reserves/Revenue Contributions	(1,217)	
Change in Budget		**(9,568)**

(

REPORT TITLE: CORPORATE RISK REPORT, QUARTER 1 2025-26

Meeting:	**Cabinet**
Date:	**9th September 2025**
Cabinet Member (if applicable)	**Cllr Graham Turner**
Key Decision **Eligible for Call In**	**No** **No – Information report**
Purpose of Report To provide an update on the Corporate Risk Register for quarter 1 2025-26	
Recommendations • That the report be noted • Cabinet determine if any additional action not listed as part of the report is required **Reasons for Recommendations** • This provides information about an assessment of risks faced by the organisation at a significant corporate level	
Resource Implications: • None directly from this report	
Date signed off by <u>Strategic Director</u> & name. **Is it also signed off by the Service Director for Finance?** **Is it also signed off by the Service Director for Legal Governance and Commissioning?**	Rachel Spencer-Henshall 31st July 2025 Yes Yes

Electoral wards affected: All

Ward councillors consulted: None

Public or private: Public

Has GDPR been considered? Yes

1. Executive Summary

The Council has arrangements to identify major corporate risks, as a means of advising those charged with governance and wider stakeholders about issues and potential issues which may threaten the ability of the organisation to achieve its objectives. The report outlines the major corporate risks, assesses their risk score as well as any movement since the previous quarter, and summarises processes and controls that are in place to monitor and mitigate identified risks.

2. Information required to take a decision

The information required is included in the attached report.

3. Implications for the Council

Having effective risk management arrangements is an important part of a strong assurance and governance framework for the Council. Identifying current and potential future risks, including acknowledging that some risks might have to be accepted is an important part of open governance.

3.1 Council Plan

Not directly applicable. (except as shown in the relevant risk identification)

3.2 Financial Implications

Not directly applicable. (except as shown in the relevant risk identification)

3.3 Legal Implications

Not directly applicable. (except as shown in the relevant risk identification)

3.4 Climate Change and Air Quality

Not directly applicable. (except as shown in the relevant risk identification)

3.5 Other (e.g. Risk, Integrated Impact Assessment or Human Resources)

Not directly applicable. (except as shown in the relevant risk identification)

4. Consultation

Not applicable

5. Engagement

Not applicable

6. Options

Not applicable

7. Next steps and timelines

Continual monitoring, reporting and actions as determined through other parts of the council's governance and management processes.

8. Contact officer

Martin Dearnley, Head of Audit & Risk
Alice Carruthers, Senior Risk Officer

9. Background Papers and History of Decisions

Previous quarterly risk management reports

10. Appendices

Report attached – Corporate Risk Report Q1 2025-26

11. Service Director responsible

Samantha Lawton, Service Director for Legal, Governance & Commissioning
Kevin Mulvaney, Service Director for Finance

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Corporate Risk Report, Quarter 1 2025/26

Q1 Summary position:

- **One new risk has been raised recognising the challenges associated with successful Project Management & Delivery**
  - A new risk has been raised DEV03 (Project Management & Delivery), which considers the operational, reputational and financial consequences if projects do not progress in line with agreed business case (time, cost & quality). This is assessed as an Amber rated risk, scored as '12'.
- **Two risks have been removed this quarter, both within Adult Social Care**
  - Risk AH02 (Adults Social Care assurance framework) has been removed, recognising that this was a new inspection methodology, all necessary submissions were made in advance of the CQC deadlines, and the onsite visit took place in May. Whilst the outcomes is not yet known we are now familiar with the process and expectation and have a good understanding of required inputs and potential areas of focus.
  - Risk AH03 Data Insight for operational delivery of Adults Services has been removed from the Corporate Risk Register. This risk continues to be managed at Service level however progress on developing and embedding operational dashboards, identifying and resolving data quality issues and provision of data submission to the CQC demonstrates effective response and management of the risk.
- **Increases in risk score:**
  - ECC01 Climate Change has increased from a score of '12' to '16'. This reflects the impact of current resourcing gaps with grant funded environmental initiatives becoming difficult or impossible to deliver and future funding being put at risk.
- **Reductions in risk score:**
  - FIN01 Budget Monitoring & Management has reduced in likelihood, acknowledging the continued strengthening of the control environment but recognising that continued focus is required to ensure that financial performance matches budget expectations. The increase in impact reflects the fact that £27m of savings targets have been agreed for 2025-26 and delayed delivery of savings will result in larger savings being required in future quarters
  - The score for LGC03 (Procurement processes) has reduced which acknowledges the successful implementation of process and documentation changes, and associated training, to meet Procurement Act requirements
  - Organisational resourcing (PS01) has been re-written to focus on the requirement to identify and meet the future resourcing needs of the council, and away from challenges within BAU recruitment activity. This has resulted in a small reduction in score (from 16 to 12). Where resourcing risks could impact materially on service delivery these risks will continue to be escalated through service risk registers and monitored accordingly.....

Kirklees COUNCIL

Summary overview (page 1 of 2)

Reference	Risk Description	Transformation Priority	Risk Owner	Risk Score	Direction of travel
FIN02	**Medium term financial sustainability**		Kevin Mulvaney	16	⇨
SI03	**Cyber security**		Terence Hudson	16	⇨
LGC04	**Contract management**	✓	Samantha Lawton	16	⇨
CF02	**SEND provision**	✓	Jo-Anne Sanders	16	⇨
DEV02	**Homelessness and temporary accommodation**	✓	Joanne Bartholomew	16	⇨
HN01	**Housing safety & quality**	✓	Phil Jones	16	⇨
ECC01	**Climate Change**		Kat Armitage	16	⇧
FIN03	**Capital plan management**		Kevin Mulvaney	15	⇨
FIN01	**Budget monitoring and management**		Kevin Mulvaney	12	⇩
PS01	**Organisational resourcing**		Shauna Coyle	12	⇩
SI01	**Data integrity**		Mike Henry	12	⇨

Kirklees COUNCIL

Summary overview (page 2 of 2)

Reference	Risk Description	Transformation Priority	Risk Owner	Risk Score	Direction of travel
LGC02	**Information governance**		Samantha Lawton	12	⇨
HP01	**Emergency planning & business continuity**		Jane O'Donnell	12	⇨
CAS01	**Community cohesion, wellbeing & resilience**		Jill Greenfield	12	⇨
DEV03	**Project Management & Delivery**		David Shepherd	12	NEW
DEV01	**Corporate assets portfolio management**	✓	Joanne Bartholomew	9	⇨
PS02	**Potential for industrial action**		Shauna Coyle	9	⇨
LGC01	**Failure in corporate governance**		Samantha Lawton	9	⇨
LGC03	**Procurement processes**		Samantha Lawton	8	⇩
AH01	**Adults safeguarding**		Cath Simms	8	⇨
HP02	**Health & safety**		Jane O'Donnell	8	⇨
CF01	**Children's safeguarding**		Vicky Metheringham	6	⇨
SO02	**Relationships with key partners**		Stephen Bonnell	6	⇨

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FIN01 Budget Monitoring and Management

Risk of in year budget overspend caused by failure to effectively manage revenue income and expenditure budgets, including delivery of agreed savings targets, which result in a negative outturn position impacting on following year budgets.

Risk Owner: Kevin Mulvaney, Service Director Finance

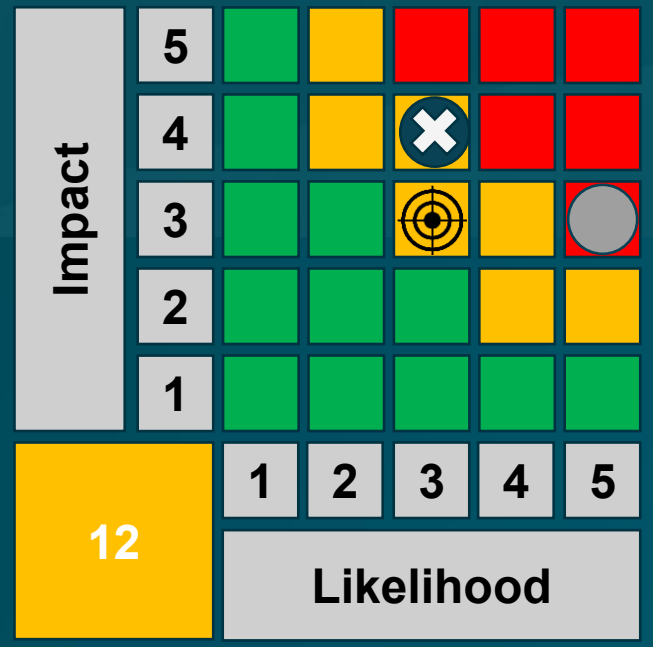
Quarterly update:

- The risk score has reduced, reflecting the enhanced control environment and that over £50m has been added to Directorate budgets to meet demand, inflation and other pressures
- Savings targets for 2025-26 have been agreed and these need to be implemented effectively in the new financial year. (£11m of new savings and £15.8m of existing savings). The challenges associated with timely delivery are indicated through the increased impact score
- Continued focus to ensure effective governance is in place to deliver ongoing monitoring of the budget position and ensure required actions are progressed at pace

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. 2025-26 budget was approved by Council in March 2025
2. Established governance arrangements are in place to achieve planned outcomes, monthly reporting to ELT, quarterly to EB, Cabinet & Scrutiny and Outturn to full council
3. Dedicated finance managers for each service areas, with monthly monitoring of budgets including savings trackers
4. Regular monthly SLT meetings with Service Directors and Finance Manager to review budget progress monitoring and savings targets and to determine actions to be taken to achieve budget.
5. Check & Challenge approach in place led by Chief Executive & CFO
6. People Panel in place to review all recruitment

Further actions underway:

1. Service directors to each have budget pack
2. Budget book to be produced for Members
3. Control of staffing budgets, linking expenditure to staff structure on SAP, work remains ongoing
4. To target significant reductions in the number of cost centres and ledger codes
5. Ongoing review of reserves and other balances
6. Establishment of specific budget contingency reserve as part of the 2024-25 outturn

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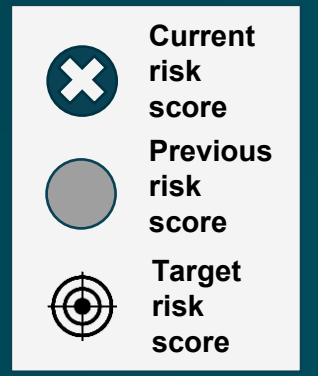
FIN02 Medium Term Financial Sustainability

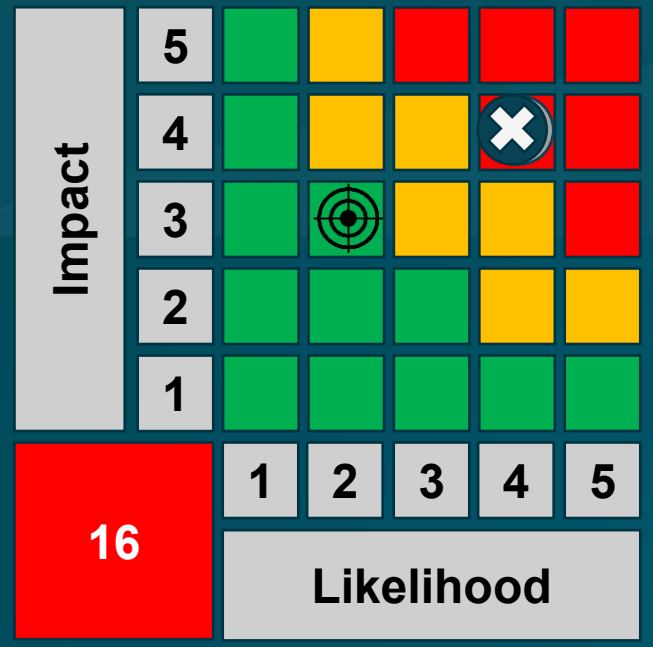
Risk of medium-long term financial instability caused by failure to adhere to robust financial planning processes and procedures, or taking the appropriate action, leading to requirement to implement changes in service provision, possible government intervention and consequential reputational damage.

Risk Owner: Kevin Mulvaney, Service Director Finance

Quarterly update:

- Risk score remains unchanged reflecting the stability that the 2025-26 budget position provides, however reflecting the uncertainty of demand pressures particularly in social care
- General reserves maintained and the HRA is in a balanced budget position, but concerns remains over the overall level of reserves held by the Council as they have reduced over the last few years
- DSG deficit position remains a high risk in the event of the removal of the Statutory override and the ongoing in year deficit
- Fair Funding 2.0 has been published for consultation and this is being reviewed for its impact





Controls in operation:

1. Annual update of the Medium Term financial plan. Next update due Sept 25.
2. Documented governance process for determining the adequacy of reserves position and utilisation of reserves, if required to balance the budget.
3. Balanced 30-year plan for the Housing Revenue Account
4. Ongoing review of the Capital Plan, considering defer / stop decisions are reviewed with quarterly updates to Cabinet
5. Treasury Management: TM strategy and plan recommended to and approved by the Corporate Governance & Audit Committee (CGAC) and Cabinet
6. External Audit: Final accounts and VFM report (2023/24) presented at CGAC in January 2025. Draft accounts produced by deadline and audit is underway.

Further actions underway:

1. Detailed review of medium-term plan and revised savings gap in conjunction with the estimated impact of the Fair Funding Review.
2. Active adjustment of budgets where there is volatile demand.
3. Continued monitoring of SEND position. Safety Valve Agreement has been extended and will now end in 2029-30, statutory override now runs to 2027-28. Awaiting Government consultation
4. Additional work on VFM assessment including benchmarking
5. Cross Party budget working group established.

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FIN03 Capital Plan Management

Risk that the agreed capital plan is unaffordable based on the ongoing revenue resources available to the council with implications for reserves levels and delivery of wider services and statutory responsibilities.

Risk Owner: Kevin Mulvaney, Service Director Finance

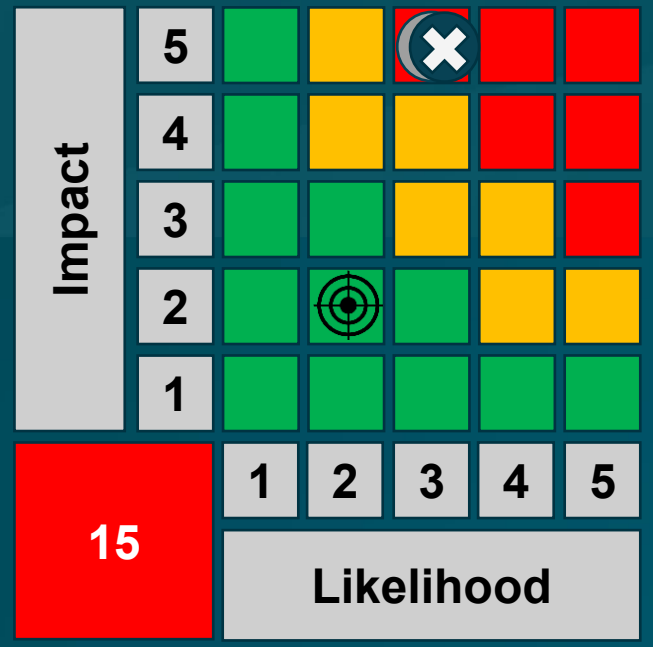
Quarterly update:

- Rollover capital plan and reprofiling completed for 24/25 and has resulted in a reprofiling of £113m of spend from 25/26 into future years
- Continued assessment of further capital investment recognising the need for any borrowing to be affordable over the medium – long term within overall resource envelope
- Request for benchmarking information has been sent to Council's across the region

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. 5 year Capital Plan developed and agreed, monitored through CAB
2. Capital Assurance Board (CAB) meet monthly to provide strategic oversight of the Council's Capital Plan, chaired by Chief Finance Officer.
3. Detailed monitoring of Treasury Management budgets to assess affordability of the capital plan
4. Capital Receipts reported at CAB

Further actions underway:

1. Capital Assurance Board meeting July 2025 to consider new bids for capital expenditure.
2. Revision of capital evaluation matrix to assess new bids (and existing strategic outcomes)
3. Reassessment of baseline capital expenditure
4. CFO to set targets for % of revenue budget for capital financing (MRP + Interest)
5. Review of capital governance across the Council to support delivery with improved capital monitoring to SLTs, ELT and Cabinet.
6. Increased focus on phasing and forecasting of spend to improve accuracy
7. Maximise opportunities for external funding
8. Asset disposal: Annual capital receipts targets agreed and capital receipts monitoring to be included in quarterly updates.

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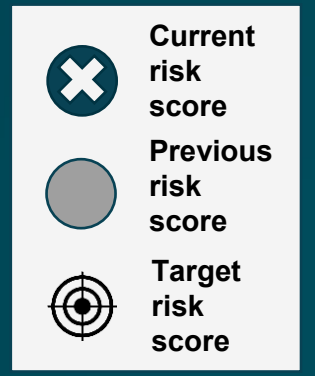
PS01 Organisational resourcing

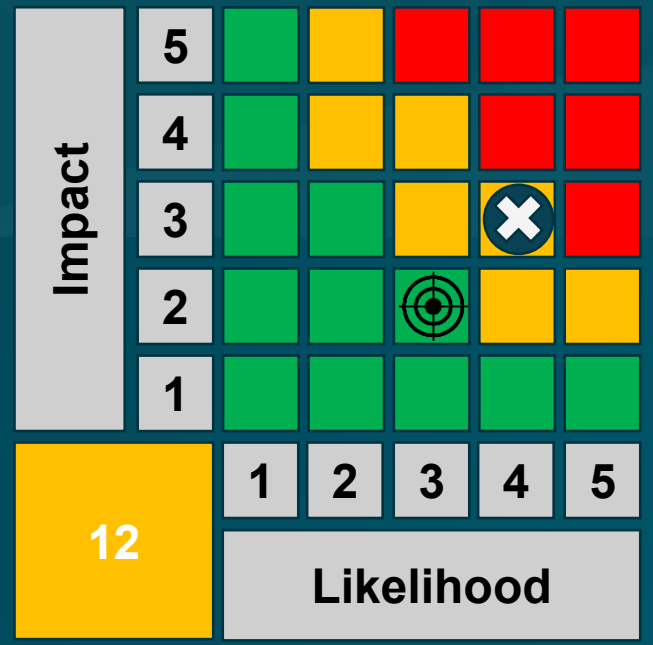
Risk that the council cannot meet its strategic objectives due to a failure to establish and plan for the future employee resourcing needs of the organisation and inability to adapt and respond to shifts in the labour market leading to possible disruption to service delivery and increased staff costs.

Risk Owner: Shauna Coyle, Head of People Services

Quarterly update:

- Workforce planning reaching more areas with resourcing challenges, will support a less reactive approach
- Entry level apprenticeship recruitment in progress and continued success of development apprenticeships in legal and social work
- Development of Linked In to develop pipelines for hard to fill roles
- Continue to see a high reliance on agency staff in some technically specialist areas - targeted work in high spend areas is underway utilising different recruitment options to reduce spend





Controls in operation:

1. Council wide workforce planning, which is aligned to the strategic objectives of the organisation, identifying skills shortages and areas of oversupply
2. Skills matrix outlining resourcing approach for different roles e.g. directly employ, contract out, develop internally, recruit part qualified etc
3. Monitoring of workforce data at Directorate and Service Leadership Team meetings with the introduction of dashboards including lead & lag indicators
4. Effective workforce planning utilising service level resource plans to identify gaps and highlight issues, recognising key drivers such as workforce age and actively developing and managing succession plans
5. Coordinated approach to vacancy management across the organisation through People Panel
6. Streamlined recruitment journey, making end to end process for both recruiting manager and candidates efficient and easy to navigate
7. Robust performance management process ensuring persistent under performance is addressed in an appropriate and timely manner

Further actions underway:

1. Further development and embedding of workforce planning - new resource planning tool developed
2. Development of pre-agreed response position against vacancies in key roles / role families so stages can be skipped or completed concurrently. Eg redeployment – internal – external – agency. To include consistent approach to market rate supplements.
3. Participation in local government recruitment campaign and national LGA talent transformation workshops to develop solutions to common recruitment and retention challenges
4. Close monitoring of retention metrics, leavers destinations, exit interview insight to identify trends and implement mitigating actions if appropriate
5. Targeted activity to address reputation / perception issues in specific recruitment markets
6. Development of skills to effectively manage increase in contractor resource to ensure value for money – eLearning module under development by L&OD
7. Continue to develop organizational awareness of FTE performance metrics and consequential impacts of increase / reduction in FTE levels (e.g. average caseload per social worker)

Kirklees COUNCIL

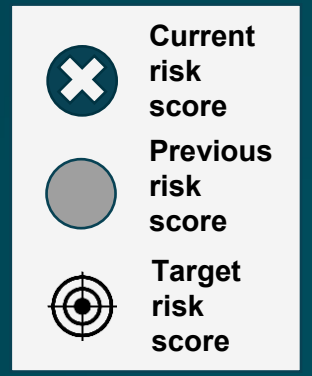
PS02 Industrial and disruptive action

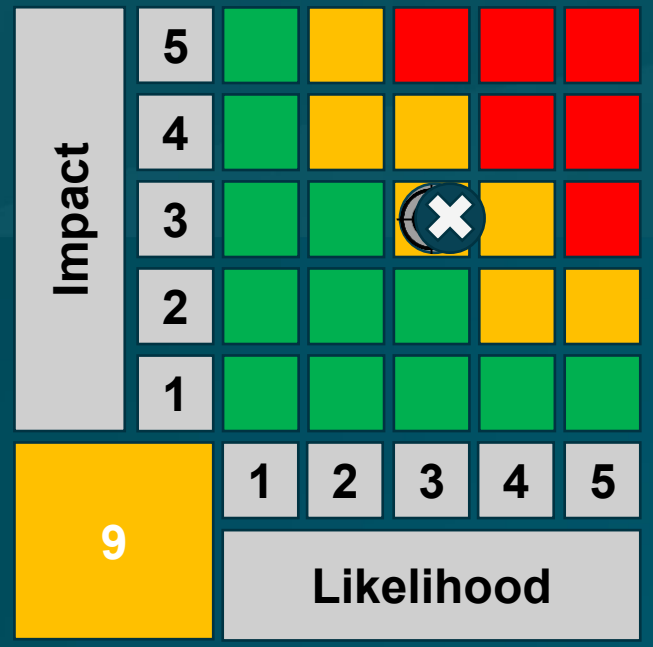
Risk that service delivery is impacted by prolonged industrial and disruptive action, triggered by service changes, budget reductions/pressures, asset rationalisation, changes to ways of working and any compulsory redundancies.

Risk Owner: Shauna Coyle, Head of People Services

Quarterly update:

- There continues to be complexity, and a high volume of employee relations matters and tribunal cases - some of this is linked to service change activity however the local position in terms of an overall increase is reflective of the national picture
- April 2025 pay offer was initial rejected by trade unions (though accepted subsequently July25)





Controls in operation:

1. Service change consultation meetings taking place with local and regional TU reps.
2. TU and Senior Leaders liaison arrangements – JCG's, TU meetings, dedicated service change meetings, workforce matters, ongoing dialogue/informal meetings with TU's via Head of People Services
3. Service Business continuity plans consider impact of industrial and / or disruptive action
4. Transition arrangements considered/consulted on for each service change

Further actions underway:

1. Recently appointed HR Manager has focus on Employee Relations providing additional resource and support
2. Reviewing and updating TU membership and facilities time
3. On going training of staff and legislation changes
4. Actions are underway to understand and address Equal Pay emerging risk and potential consequences.

Kirklees COUNCIL

SI01 Data Integrity

Risk of poor/uninformed decision making, failure to maximise income or inability to comply with statutory requirements caused by data integrity issues leading to reputational damage, ineffective resource allocation and/or a reduction in Council funding

Risk Owner: Mike Henry, Head of Data & Insight (D&I)

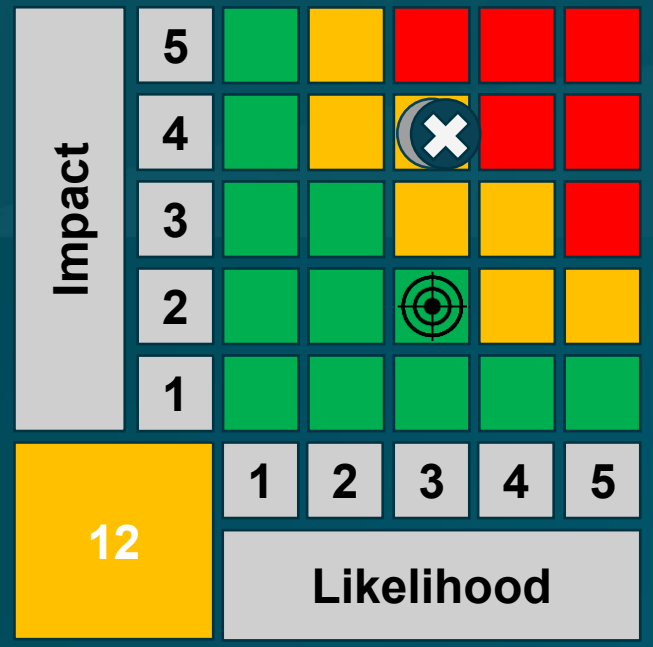
Quarterly update:

- Continued focus on enabling delivery within areas subject to regulatory oversight and / or new regulatory requirements as well as support to activity that is a Transformation priority.
- Council-wide data apprenticeship programme launched aimed at improving data literacy.

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Regular prioritisation of Data & Insight resources and activity to ensure they reflect council priority areas. This includes weekly reviews for critical and high-risk areas (e.g., Children's Social Care, Adults Social Care).

2. Targeted interventions in high risk/profile areas such as Homes and Neighbourhoods, Early Support and Adult Social Care.

Further actions underway:

1. Development of a Data Management Strategy to be considered as part of the council's new Digital Strategy/Transformation Programme.
2. Continued focus on resource capability and capacity both across Data & Insight and within services.
3. Working collaboratively with services to raise awareness of data management and governance requirements
4. Increased focus on data migration decisions, plans and approaches when implementing new applications across the Council
5. Additional work to ensure that data processes are integrated properly for delivery of management information.

Kirklees COUNCIL

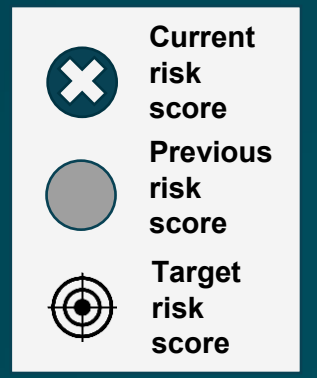
SI02 Relationships with key partners

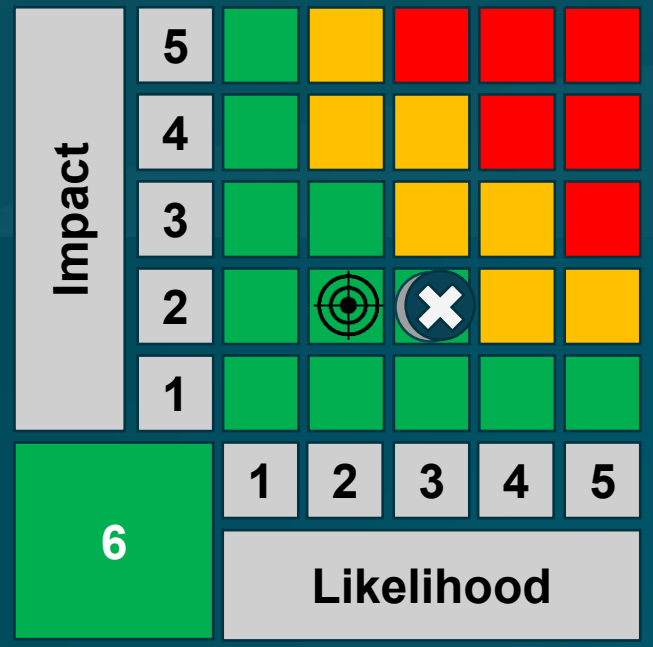
Risk of poor outcomes for Kirklees in terms of priority setting and funding allocations caused by failure to develop and maintain effective relationships with key regional and local partners and organisations, impacting on our ability to meet statutory and local requirements.

Risk Owner: Stephen Bonnell, Head of Policy, Partnerships & Corporate Planning

Quarterly update:

- A number of significant national changes to the focus and funding of health organisations have been announced and are being proactively monitored through regular engagement with health partners and monitoring of national announcements.
- Partnership working with WYCA is evolving ahead of an integrated funding settlement in April 2026. This includes adjustments to decision making processes.
- Regular coordination meetings with TSL (Third Sector Leaders) leadership started this quarter and are informing several action areas including a draft action plan on improvements to the way the council works with and supports the third sector. Community anchor programme and community networks activity delivered to support grassroots community partners





Controls in operation:

1. Effective senior officer and member representation through WY committees and several key informal engagement groups, including WY Chief Executives, Directors of Development, WY Strategy Leads, and monthly WY ICB leadership meetings
2. Local partnerships, including Partnership Executive, Kirklees Health & Wellbeing Board, Communities Board, Safeguarding Boards, and other bilateral and multilateral groups
3. Top tier partnership strategies outline how partnership working will contribute to the achieving our vision for Kirklees with agreed shared outcomes.
4. Outside body representation formally noted at Corporate Governance & Audit Committee on annual basis
5. External Funding strategic relationship mapping across all directorates
6. Briefing arrangements to support members and officers attending meetings
7. Internal senior level coordination group established: WY Monthly Planning meeting with the Chief Exec, Deputy Chief Exec, Exec Director for Place, Leader, Deputy Leader
8. Regular health partner engagement

Further actions underway:

1. Work developing on improving partnership working at a West Yorkshire level
2. Inclusive Economic Strategy due for decision at Full Council in July 2025
3. A Kirklees Economic Summit is being developed in order to engage with business and economic partners on the Inclusive Economy Strategy
4. Building connections between teams to support broader relationships and connections, minimising the risk associated with individual relationships and points of contact.
5. A number of bilateral conversations to address issues and opportunities relating to specific areas of collaboration. This includes with WYCA and other West Yorkshire local authorities.
6. As part of developing the corporate peer challenge action plan we are considering a review existing business and economy engagement mechanisms to identify areas for improvements
7. Joint working with ICB colleagues on neighbourhood level collaboration across council services and local health services

Kirklees COUNCIL

SI03 Cyber Security

The risk of a data breach and / or impaired system functionality caused by a malicious cyber-attack leading to inability to deliver council services, costs to recover / compensate and associated reputational damage

Risk Owner: Terence Hudson, Head of Technology

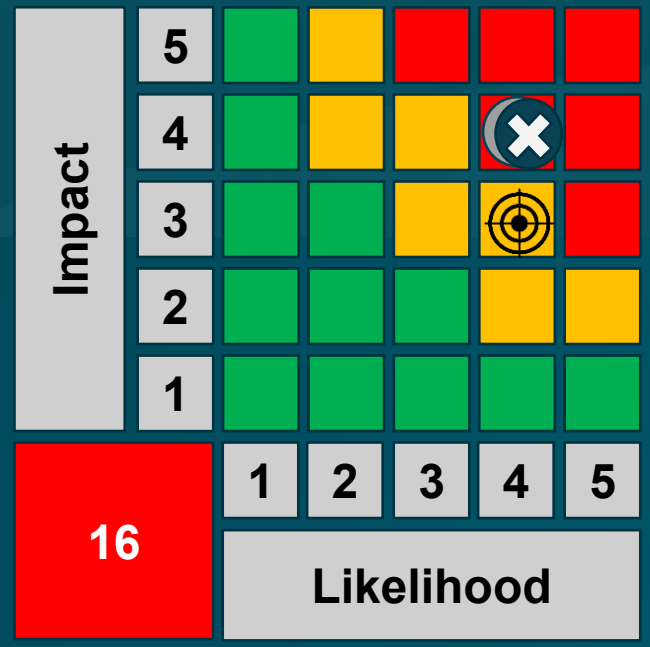
Quarterly update:

- Work continues on the Cyber Assessment Framework, first gateway achieved. DSPT audit completed
- Technical controls remain strong and updated major incident plan is in place. Alignment with existing Business Continuity plans underway to ensure effective coverage of end-to-end processes
- The use of untrusted AI bots remains an issue but IG and IT work together to provide guidance on removing them from meetings
- Discussion had with Microsoft regarding M365 E5 and business case being developed to take the additional security benefits from E5. Work continues on replacement of Privileged Access Management

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Documented and approved Cyber Strategy: A WY ICS Cyber Strategy is being developed which we will adopt and replace the existing strategy
2. Adherence to National Cyber Security Centre (NCSC) guidance
3. Self assessment and independent validation of our cyber risk exposure through the NCSC Cyber Assessment Framework
4. Penetration tests and PSN accreditation is maintained on an annual basis
5. Annual compliance with the NHS Data Security & Protection Toolkit (DSPT)
6. Access to core systems restricted through Privileged Access Management
7. Information Governance Board (chaired by SIRO) undertakes review of risk and controls on 6 monthly basis to provide assurance
8. Regular communications and mandatory training (IG) to ensure that staff are fully aware of their responsibilities and to highlight potential risk areas

Further actions underway:

1. Ongoing monitoring of the threat landscape, which continues to increase in terms of sophistication and requirement of response
2. Consideration of cyber security risk throughout the development of the new Kirklees Council Digital Strategy. Evaluation of the risks and opportunities involved with the usage of Artificial Intelligence as part of this strategy
3. Explore the possibilities and cost implications of further perimeter controls, e.g. Enhanced 'Security Operation Centre' services such as 24x7 external on-call support to complement our capacity; Acquire Office 365 E5 licences
4. Enhanced focus on assessment of third-party cyber risk, work underway across Procurement, IT and IG to implement more robust pre-contract assurance and ongoing assessment of control adequacy and performance
5. Review market for cyber insurance with consideration given to cover, exclusions and value for money

Kirklees COUNCIL

LGC01 Corporate Governance

Failure to ensure that effective processes, frameworks and relevant training are in place and adhered to in order to facilitate compliant and legally sound decision making, avoiding subsequent challenge and reputational damage. Applies to Members, Officers, and the relationship between them.

Risk Owner: Samantha Lawton, Service Director Legal & Commissioning

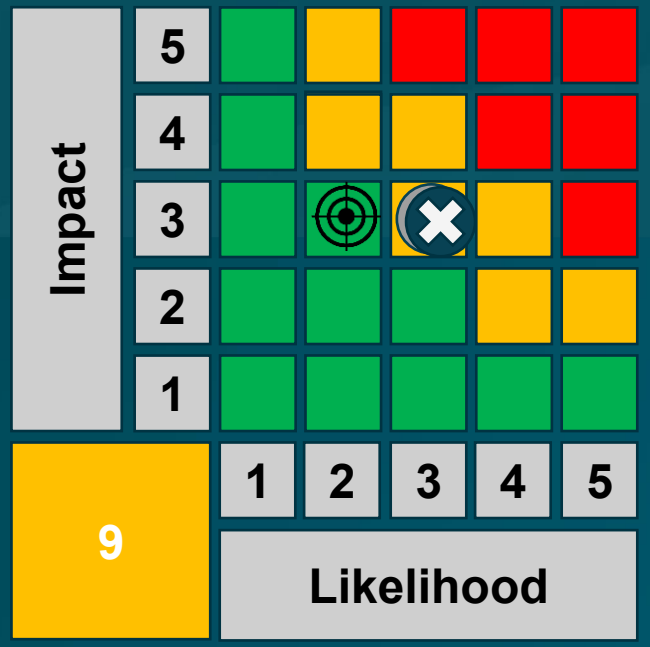
Quarterly update:

- Refreshed/additional guidance on decision making procedures has been launched, comms has been provided and web pages updated. Online courses continue to be developed to assist officers and Members navigate decision making routes and committee process, including scrutiny. Governance Officers are attending SLT's to promote good governance and re reinforce procedures.
- New Cabinet is now in place - new and existing Cabinet Members have been briefed on decision making/role of Cabinet Members

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Constitution
2. Leader & Cabinet model with portfolio holders and scrutiny function
3. Code of Conduct for Members and Officers
4. Scheme of delegations approved
5. Report templates
6. Annual Governance Statement
7. Fraud, Bribery & Corruption Policy
8. Conflicts of Interest Policy and Protocols for Gifts & Hospitality
9. Member and Officer induction and training
10. Whistleblowing procedures
11. Internal & External Audit
12. Financial Procedure Rules and Contract Procedure Rules

Further actions underway:

1. Ensuring the new minority Cabinet is supported to achieve effective and timely decisions through the governance process

2. Further consideration of updates to constitution to facilitate effective decision making
   - Constitution Working Group is up and running (with agreed terms of reference) and will continue during the new municipal year
   - Reports to CGAC as part of the updating of the Constitution by the Monitoring Officer have been considered and have now been approved at Annual Council

Kirklees COUNCIL

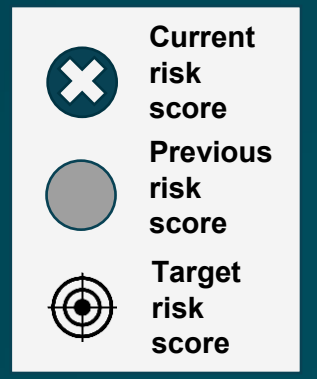
LGC02 Information Governance

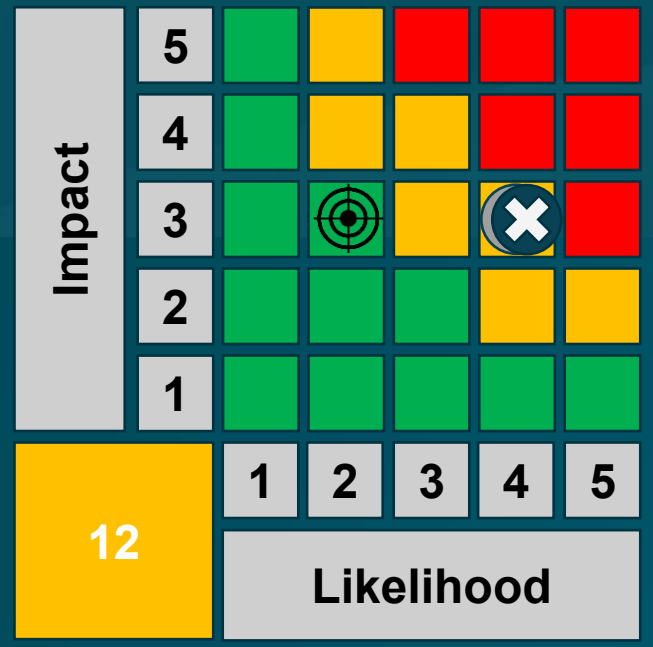
Failure to process (obtain, hold, record, use, share) information in line with the UK General Data Protection Regulations, Data Protection Act, Freedom of Information legislation and other relevant legislation leading to regulatory censure, fines, and associated reputational damage

Risk Owner: Samantha Lawton, Service Director Legal & Commissioning

Quarterly update:

- Continue to receive large volumes of FOI and Data Protection Requests
- One incident was reported to the ICO – the ICO are not taking any further action
- Internal audit on Data Sharing Practices concluded – recommendations and report provided
- The 2024/25 DSPT assessment was submitted
- New Information Governance training module for desk-based staff launched on MyLearning
- Data (Use & Access) Bill received royal assent





Controls in operation:

1. Approved policies including Data Protection and Information Governance Policies
2. Information Governance Board has delegated responsibility to oversee information governance issues and reports to the Executive Team and Corporate Governance and Audit Committee as appropriate
3. Mandatory training provision for all staff annually, plus additional training is available online or in-person, directly from the IG Team
4. Online reporting functionality for information security incidents
5. Regular communications via corporate channels to staff
6. Guidance documentation available via the intranet to support staff
7. Privacy notices available on the corporate website, enabling transparency with Kirklees residents
8. Annual compliance with the NHS Data Security and Protection Toolkit (DSPT)

Further actions underway:

1. Development of the Record of Processing Activity (RoPA) being overseen by the Information Governance Board
2. Development of improved Data Protection Impact Assessment (DPIA) process providing clearer guidance and delivering efficiency for staff with roll out on track to commence in Q2
3. Review of IG Team ways of working to address SARs backlog continues
4. Data sharing audit report recommendations are being reviewed to finalise an action plan to address the recommendations via an IG data sharing working group overseen by the IG Board

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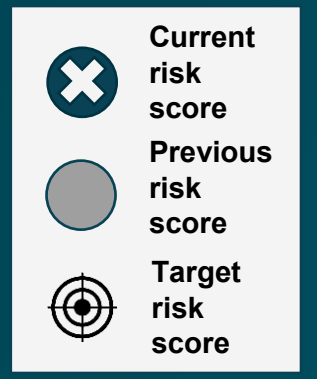
LGC03 Procurement

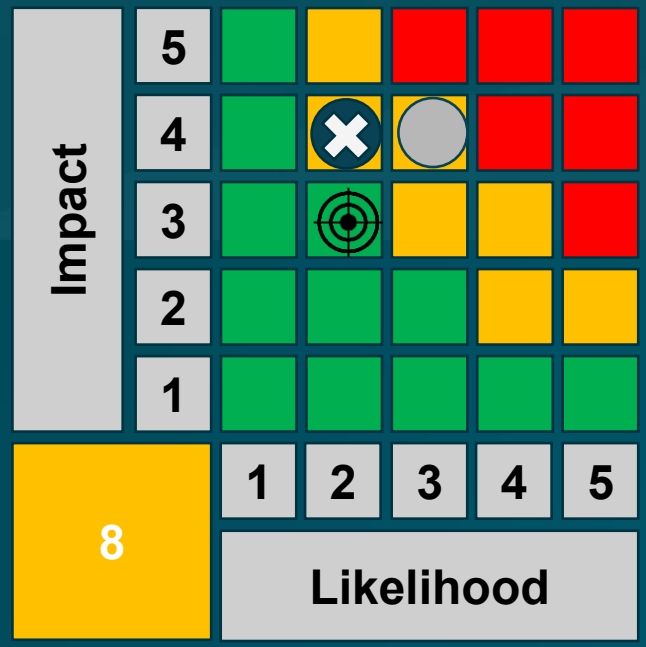
Risk that the council enters into contracts with suppliers / commissioned service providers that do not secure the intended outcomes, due to inadequate or non-adherence to processes and procedures resulting in increased costs, reduced benefits and possible statutory breaches and reputational damage.

Risk Owner: Samantha Lawton, Service Director Legal & Commissioning

Quarterly update:

The risk score has reduced this quarter, reflecting the reducing likelihood of risk materialising in this area. This is as a result of focussed activity to meet the requirements of the Procurement Act which came into force earlier this year. All processes and documentation have been updated and training on the new regime has been completed by all staff within the Procurement team. The service continue to support the delivery of Our Council Priorities through a category management approach ensuring procurement activity is well planned, appropriately resourced and delivers the best outcomes for the Council.





Controls in operation:

1. Procurement Strategy
2. Contract Procedures Rules, reviewed and approved on an annual basis (May 2025 latest version)
3. Agreed roles & responsibilities across key stakeholders in procurement journey: Procurement, Service lead, Legal, Technology, Data etc…
4. Effective pipeline management through use of the Procurement tracker, linked to measures outlined in Procurement Strategy
5. Utilise the regional procurement portal - YORtender
6. Category Managers aligned to service areas
7. Procurement staff training up to date, including Procurement Act changes
8. Contract register maintained
9. Contract Assurance Oversight Board
10. Declaration of Conflicts of Interest process in place

Further actions underway:

1. Publication and communication of the updated Procurement Strategy, reflecting changes required as a result of the Procurement Act 2023
2. Updating of Procurement intranet pages to provide accessible guidance for staff involved in procurement activities
3. Development of e-learning training modules for staff involved in procurement activities to raise awareness and upskill across the procurement lifecycle
4. Working with Data & Insight to identify instances of off-contract spend and develop controls to prevent reoccurrence
5. Continued vigilance of the external market to understand new trends and emerging risks as a result of process changes triggered by the Procurement Act

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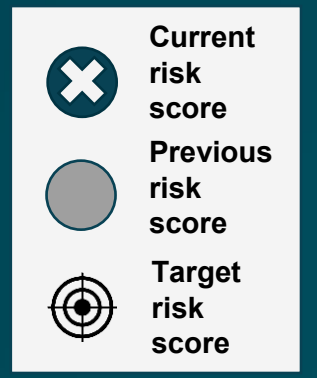
LGC04 Contract Management

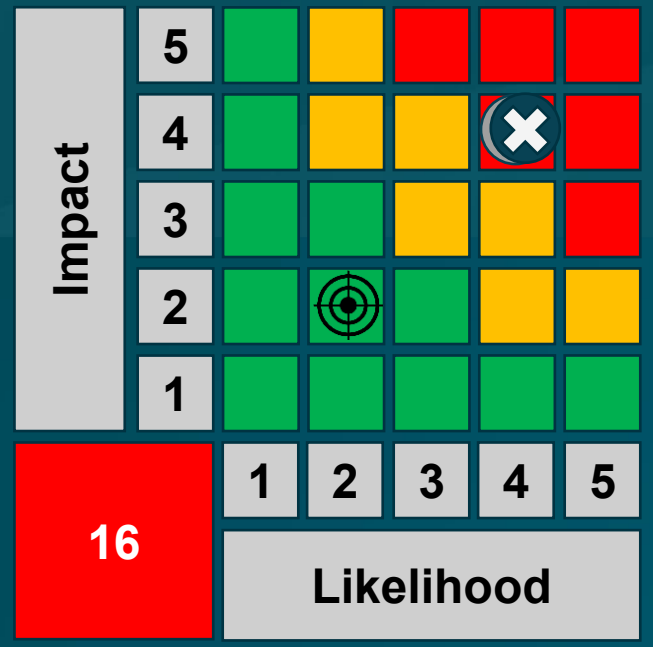
Risk that suppliers do not provide goods / services in line with contractual agreements and / or a failure to identify, control and manage risks arising through supplier / contractor activity due to lack of robust oversight and quality assurance arrangements.

Risk Owner: Samantha Lawton, Service Director Legal & Commissioning

Quarterly update:

The Contract Management Review, with support from the Transformation Team, is progressing rapidly, with process improvements on track to commence delivery in Q2 2025-26. The Contract Management Framework aims to establish a uniform approach to contract management across the organisation, providing templates and guidance whilst enhancing competence through internal and external training. It is anticipated that the overall risk score will reduce as we address inconsistencies in approach, however it is important to note that areas of significant risk exposure may be identified through this work and require independent escalation and ownership.





Controls in operation:

1. Contract Assurance Oversight Board (CAOB) has oversight of significant contracts. The Board has a ToR and meets regularly
2. Council wide Contracts Register in place
3. KPIs / outcome measures / specifications that will be used to monitor performance are agreed pre contract completion and defined within contractual documentation
4. Contract handover document is produced by Procurement team and provided to contract manager. Document details contract manager responsibilities and specific KPIs that will need monitoring
5. Dedicated resource is in place within some Directorates which provide guidance, consistency and rigour in approach

Further actions underway:

1. Refresh of contract management framework, including guidance and templates, to promote a consistent approach across the organisation
2. Implement a Contracts Dashboard to support regular review within services and provide assurance / identify issues across all active contracts
3. Increased focus on robustness of processes for performance monitoring e.g. source of performance data, frequency, timeline to recover, penalties for non delivery
4. Identify and close gaps in knowledge or skills through development and rollout of an e-learning module on contract management and exploiting opportunities available through the Government Commercial College
5. Communications programme to raise awareness of requirements under the new contract management framework and training opportunities available to support
6. Development and formalising of approach, including resourcing requirements, to ensure best outcomes from PFI contracts as they approach termination, involving all relevant stakeholders

Kirklees COUNCIL

HP01 Emergency Planning & Business Continuity

The risk that the Council's incident management / emergency planning is insufficient to manage a serious incident or series of related incidents leading to short term or prolonged impacts on the Kirklees community and Council employees and operations.

Risk Owner: Jane O'Donnell, Head of Health Protection

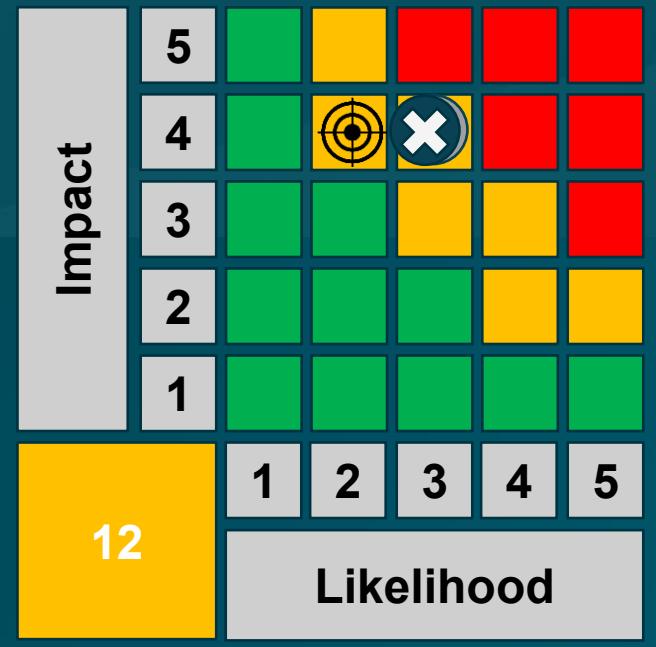
Quarterly update:

- Major Incident Plan continually reviewed in-line with review schedules and learning from our incident response
- Continue to work with partners to understand, plan and prepare to embed the duties within Martyn's Law
- Planning for corporate exercise of evacuation of high-rise block of flats
- Working with Risk and HR on recommendations from the Personal Security Maturity Assessment

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Embedded emergency management system that aligns to national guidance (.gov, etc)
2. Readiness and competencies are monitored through completion annually of a self-assessment audit
3. Governance through Kirklees Health Protection Board and Local Resilience Forum
4. West Yorkshire Resilience Forum Community Risk Register
5. Business Continuity Resilience 'pulse check' completed on a monthly basis by all Services
6. Training people on their roles/responsibilities and exercising of plans.
7. Major Incident Plan and associated appendices
8. Collaborative working and information sharing with key stakeholders
9. Personal Security Maturity Assessment completed for the organsiation

Further actions underway:

1. Terrorism (Protection of Premises) Act 2025 has now received Royal Ascent with an implementation period of at least 24 months. Work continues to meet new duties ahead of deadlines.

2. Lockdown and Run, Hide, Tell procedures continue to be rolled out

3. Understanding the impact of NHS reorganisation on Kirklees place is this an emergency planning & business continuity action or broader?

Kirklees COUNCIL

HP02 Health & Safety

Failure to provide appropriate framework, guidance and monitoring of corporate H&S statutory requirements results in a preventable H&S incident involving colleagues and / or members of the public with possible financial, legal and reputational impacts

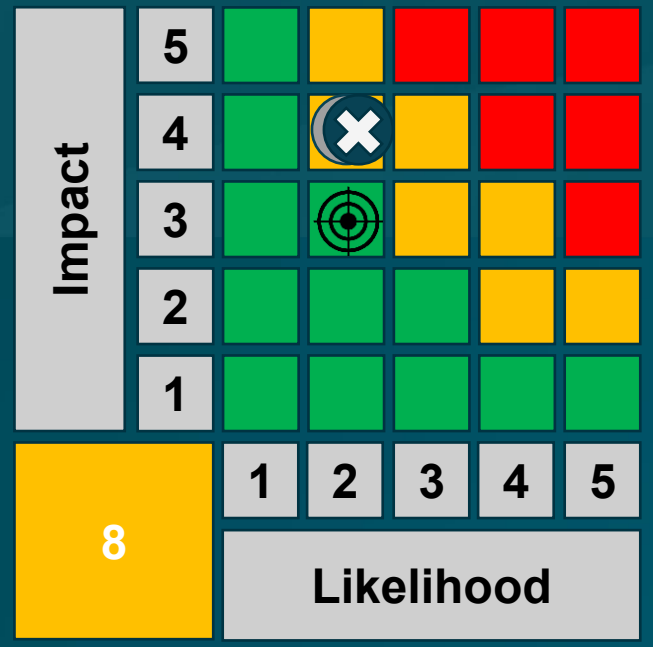
Risk Owner: Jane O'Donnell, Head of Health Protection

- Continue to drive improved compliance levels with completion of mandatory Health & Safety training across the Council
- Supported senior management following specific incident in educational setting

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Policy, Strategy and associated guidance reviewed regularly. Legal compliance is the accepted minimum standard
2. Governance through H&S Oversight Board which meets quarterly and is chaired by Strategic Director. Board reports onwards to ELT with six monthly corporate H&S performance report
3. Mandatory training matrix specifies minimum level of training dependent on job role.
4. Online incident reporting system. Accident, incident and near miss reports monitored and investigated as necessary
5. Reportable injuries, Occupational diseases (HAV syndrome, carpal tunnel syndrome) and Dangerous Occurrences are reported to the HSE in line with RIDDOR regulations
6. Embedded safety advisor role sits within relevant Service organisational design to provide advice and guidance
7. Management review and inspection of high & medium risk premises

Further actions underway:

1. Ensure that Kirklees Leadership Team complete the IOSH Managing Safely for Senior Executives training
2. Review of H&S at Depots
3. Working with People Services to review the Drug & Alcohol Policy and consider if further enhancements are required

Kirklees COUNCIL

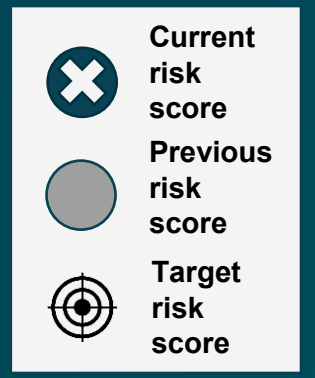
CF01 Childrens Safeguarding

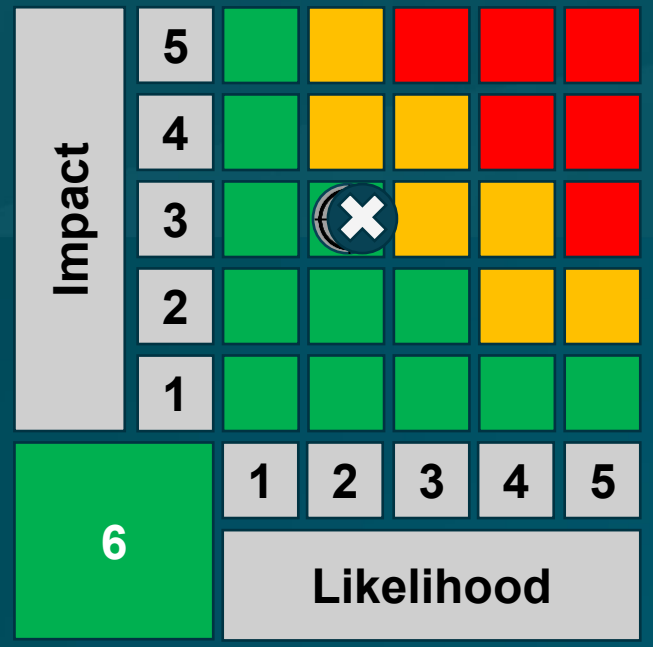
Risk of children and young people being at risk of significant harm due to increased complexity, referral volumes and a lack of service capacity to respond to the assessed need.

Risk Owner: Vicky Metheringham, Service Director Resources, Family Support & Child Protection

Quarterly update:

No change this quarter. All controls and actions remain in place.





Controls in operation:

1. Governance and senior management oversight – e.g. QA panel, scrutiny, Ambition Board
2. LADO procedures in place
3. Disclosure & Barring Service (DBS)
4. Robust procedure in place to manage unregulated provision, if required
5. Training & supervision, Learning Conversations, Practice Learning Days, annual practice week,
6. Well embedded Kirklees Safeguarding Children Partnership (KSCP)
7. Caseload management and IRO oversight
8. Rolling recruitment to key posts
9. Enhanced oversight of practice
10. Corporate parenting approach and support to care leavers has improved.

Further actions underway:

1. Implementation of Integrated model to meet requirements of Stable Homes Built on Love (McCallister recommendations) and updated Working Together guidance
   - Phase 1: Completed April 2024
   - Phase 2: Completed Jan 25, post implementation review currently being planned
   - Phase 3: Planning underway

2. Planning activity is underway preparing for the Children's Wellbeing and Schools Bill, utilising regional networks and establishing appropriate oversight and governance arrangements to track required outcomes

Kirklees COUNCIL

CF02 Education, Health & Care Plans, SEND compliance & financial impact

Risk that the EHCP operating model does not meet client or council needs, due to increases in demand, complexity of clients needs and a lack of existing local provision, resulting in missed statutory deadlines, regulatory scrutiny, reputational impact and financial consequences

Risk Owner: Jo-Anne Sanders, Service Director Learning & Early Support

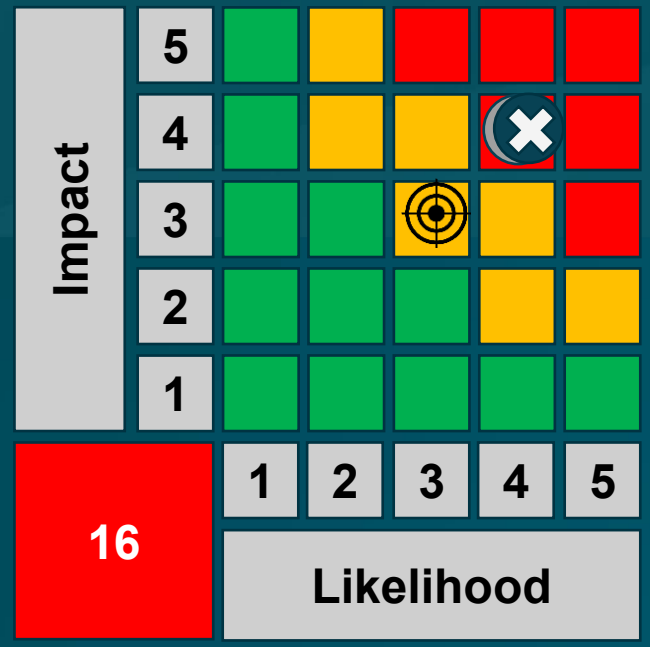
Quarterly update:

- SEND area inspection completed in Q1, with four areas of improvements to be monitored and tracked
- EHCP service continues to embed new processes and drive improvements in efficiency and performance. New EHCP processing times continue to reduce, now performing ahead of England national average. Backlog has been worked and cleared.
- Annual reviews being prioritised at change of phase to ensure requirements are up to date
- Cost of placements continue to exceed underlying budget, and impact on budget lines held elsewhere.

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Documented process in place for new and reviews of existing EHCPs
2. Performance monitoring in place utilising enhanced reporting data and quality assurance framework to maintain quality and drive continuous improvement
3. Effective financial controls in place including panel scrutiny and approval of external placements.
4. Safety Valve commitments subject to ongoing monitoring and financial returns provided to the DfE on a quarterly basis
5. Governance and communication strategies across stakeholder community reflecting the systemic ownership and ensuring partners are updated on priorities, progress and risk in a timely manner
6. SEND Sufficiency Strategy 2025-2028 has been published

Further actions underway:

1. SEND Transformation programme in place to support change delivery
2. Focus on building capacity to support parents who wish to progress to mediation over EHCP outcome, with the intention to support early resolution and reduce the number of cases progressing to tribunal
3. Cluster end of year review to take place in Q2, with consideration of feedback received from DfE
4. Rolling programme of recruitment to address areas of significant pressure including turnover e.g. in EHCP team
5. Local provision will be enhanced by delivery of two new special schools (both 2027), which should contribute to an improvement in financial position
6. Engagement with partners and relevant bodies to prepare for and respond to Schools White Paper that is expected in October 2025

Kirklees COUNCIL

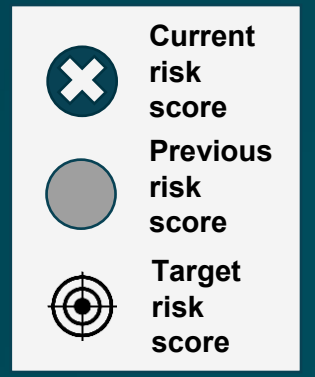
AH01 Adults Safeguarding

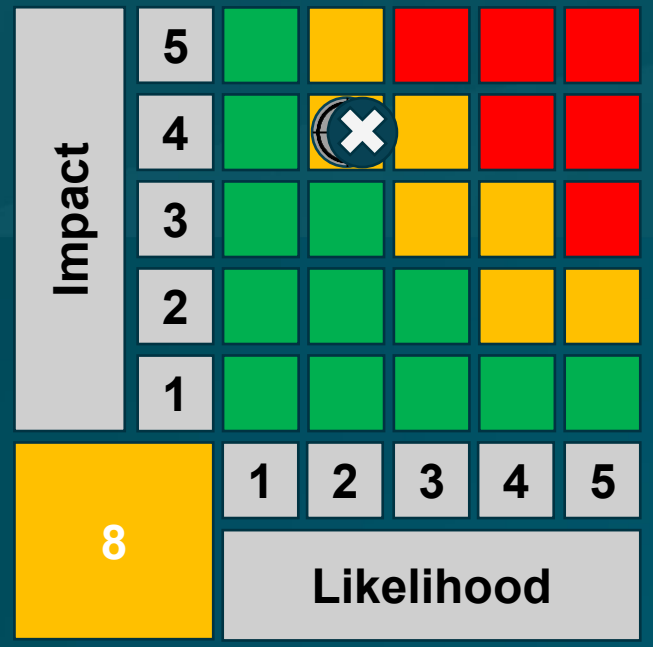
Failure to adequately safeguard vulnerable adults from harm, abuse and neglect because of increased complexity, referral volumes and a lack of service capacity to respond to the assessed need.

Risk Owner: Cath Simms, Service Director Adult Social Care Operations

Quarterly update:

- Developing practice to improve professional portal admin to ensure no backlogs
- Kirklees Safeguarding Adults Board development day to identify key priorities for 2025/26
- New safeguarding training commissioned by KSAB rolled out to all teams
- Learning from SARs priority action from KSAB





Controls in operation:

1. Corporate Safeguarding Policy reviewed regularly (Jan 2024)
2. Mandatory training requirements and additional training where need identified
3. Person in position of trust (PIPOT) process in place – being reviewed.
4. Self-neglect policy and pathway in place. Self-neglect cases managed through the multi-agency risk escalation conferences
5. Adult's representation on all strategic and operational groups related to safeguarding (such as; Prevent, Domestic Abuse and Modern Slavery)
6. Governance through Kirklees Safeguarding Adults Board and Health & ASC Scrutiny Panel
7. Learnings and improvement plans from Safeguarding Adults Reviews (SAR) reports
8. Prioritisation and escalation managed by Safeguarding Service Manager
9. Large Scale Safeguarding Enquiry (LSE) policy is being reviewed
10. Waiting Well policy rolled out in the hubs – S42 enquiries allocated within 48 hours

Further actions underway:

1. Long-term Adult Social Care front door safeguarding team to be implemented within Q2 of 2025-26. Delays have postponed the implementation date – currently in 45 days consultation.

2. Safeguarding professional portal and care homes portal are being reviewed – improvement plan to be agreed in Q2.

3. Improvement plan for Data Quality for safeguarding referrals, concerns and S42 enquiries progressing.

4. PIPOT policy is being revised, to ensure internal processes are clear and in line with parallel Council procedures. Delayed from Q1 however will complete during Q2 2025-26

Kirklees COUNCIL

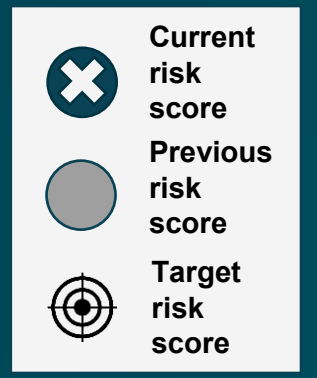
CAS01 Community Cohesion, Wellbeing & Resilience

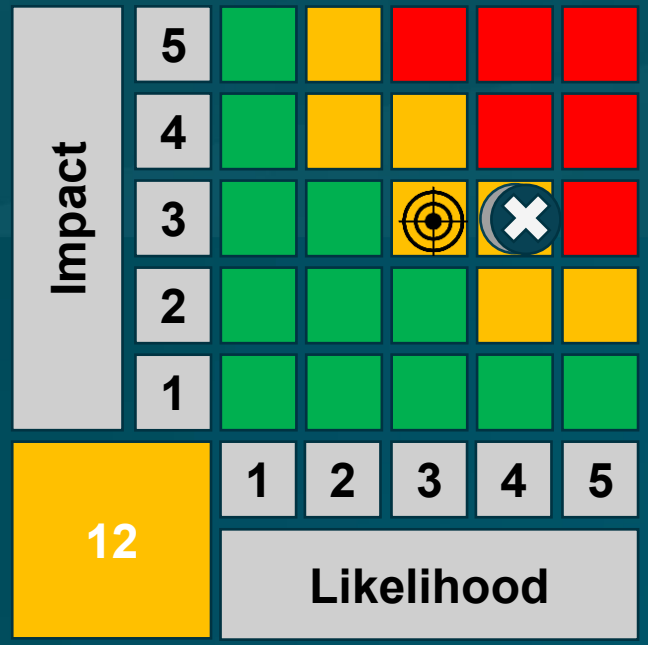
Risk of public disorder due to failure to monitor and mitigate rising community tensions, matters of violent extremism and related safer, stronger community factors, including criminal exploitation and national / international incidents

Risk Owner: Jill Greenfield, Service Director Communities & Access Services

Quarterly update:

- Weekly tension monitoring alongside tension briefings continue to be delivered to a range of staff to raise awareness around how to report tensions to Safer and to Partnership Intelligence Portal (PiP)
- Prevent training with schools continues, project proposals submitted to Home Office focussing on key themes e.g. online extremism, neurodiversity and mental health
- Programme of activities taken place around knife crime awareness with partners
- New process in place to request change to Safer CCTV camera locations based on intelligence and focus
- Community Safety Partnerships Strategic Intelligence Assessment 24/25 complete and shared at Council's Overview and Scrutiny Management Committee May 2025





Controls in operation:

1. Dedicated community tensions monitoring process and a clear procedure to process intelligence related to protests and tensions. Procedure includes Police and Emergency planning colleagues.
2. Weekly tensions monitoring meetings are held with all relevant partners, escalations are reported into Police Silver and via Safer/Emergency Planning internally dependent on issue. Silver/Gold groups in place for oversight.
3. The Prevent Action Plan prioritises community engagement, critical thinking and ideological issues and seeks to mitigate risk.
4. Engaging with and enabling opportunities for communities to build relationships and counter extremist narratives.
5. Building community resilience via the Inclusive Communities Framework.
6. Community Partnership Plan (statutory requirement) informed by annual Strategic Intelligence Assessment

Further actions underway:

1. To further develop awareness around what is a community tension and impact, where to report, how to respond –County lines intensification, anti-social behaviour, youth focussed work linked to awareness and prevention planned for Violence Reduction Partnership priority geographical locations identified based on outcomes of multiple needs assessments and other indicators (deprivation/school data). Implementation plan covering WY and Kirklees strategy and partnership priorities 25/26 to be signed off at Gold Strategic Group .
2. Prevent engagement training in pipeline for front line Communities staff, planned to be completed during 2025
3. Development of a new 3 yr Community Safety Partnership Plan 2026-29 Partnership KPIs aligned to community safety themes and priorities in development to help assess risk, system pressures, effective action.

Kirklees COUNCIL

DEV01 Corporate Assets

Failure to effectively manage the liabilities arising from the council ownership and management of corporate assets, including building safety and financial liabilities, caused by failure to implement the corporate property strategy and insufficient control environment

Risk Owner: Joanne Bartholomew, Service Director Development

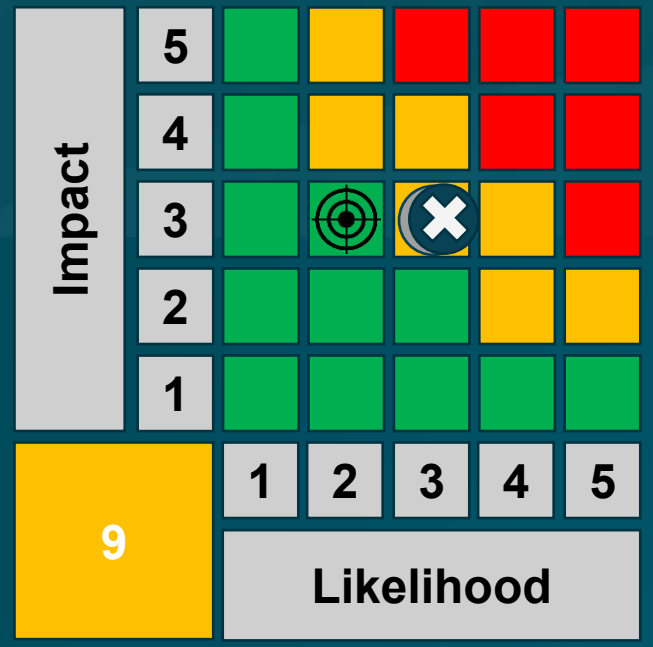
Quarterly update:

- Additional work to understand and control risk associated with expiry of school Public Private Partnership (PPP) contracts and ensure value for money. Surveys being undertaken and staff recruited to support
- Asset rationalisation progressing and will achieve income targets set. Demand from market is higher than originally expected. Strategy in place for future auctions along with asset lists for these
- Almondbury school now removed from PPP contract and new schools works can proceed. Lessons learned to be reviewed.
- Continued focus from Insurers on availability and quality of building condition surveys

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Condition surveys – 5-year cyclical plan in place for all assets, final buildings to be surveyed in 25/26, 1 year ahead of projections. Any issues are reported to respective School or Corporate Facilities Management team immediately.
2. Building Safety compliance levels monitored on a monthly basis with assurance and oversight through H&S Oversight Board and Building Safety & Assurance Board (Corporate)
3. Development of Corporate Compliance Guide and updating of supporting Processes & Procedures, published on intranet as they become available
4. Programme of disposals and asset rationalisation to reduce available assets and use only as required to reduce revenue costs.
5. Programme of Planned Preventative Maintenance in place. Note that this ensures minimum Health & Safety requirements are met but does not necessarily deliver modern working practices

Further actions underway:

1. Procurement of new Corporate Assets Facilities Management database
   - Specification prepared and issued to Procurement
   - Procurement strategy in place and planned to begin Sept 2025
   - DDN issued to HoS and SD for this project at request of Legal.
2. Asset Strategy & Core Estate review
   - Asset Strategy on hold pending estate review
   - New Asset Strategy Manager recruited, start date Autumn 2025
3. Continued focus on addressing issues at high priority assets including Dewsbury Sports Centre, Cleckheaton Town Hall, Batley Town Hall & Batley Library
4. 16 capital bids prepared and issued for high profile buildings, including bids for Kirkgate Buildings, Oakwell Hall, the Commercial Estate, disability access schemes and school modular building replacement.

Kirklees COUNCIL

DEV02 Homelessness and temporary accommodation

Insufficient availability of suitable accommodation options for temporary or permanent accommodation due to rising demand, reducing affordability and increasing complexity of priority need households, resulting in budget & legal challenge, poor customer outcomes and possible community cohesion issues

Risk Owner: Joanne Bartholomew, Service Director Development

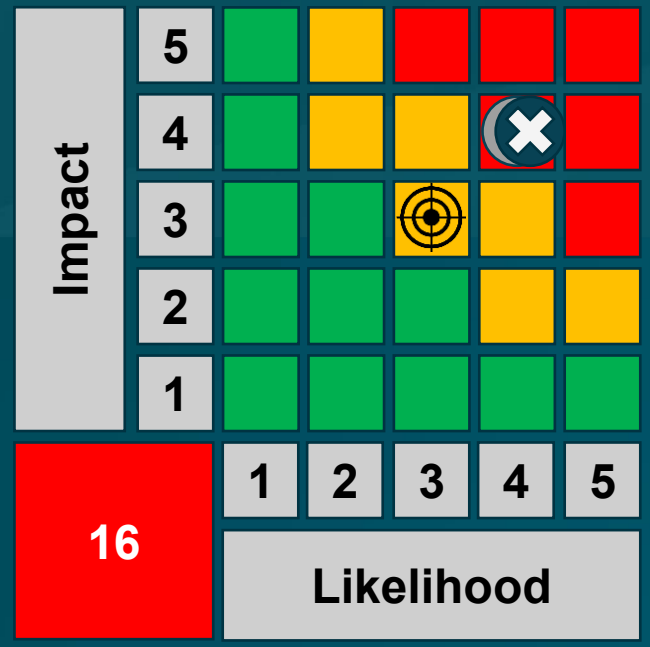
Quarterly update:

- Demand pressures resulting in continued high usage of Temporary Accommodation (TA), at the end of June there were 378 households in TA, the number in B&B continues to reduce (134 at the end of June), demonstrating positive downward trend.
- Increased grant funding (c. £2.5m) awarded to Kirklees for 2025/26 to support homeless prevention, rough sleeping prevention and emergency accommodation pilot activity
- Longer term government approach to housing supply challenges remains unclear
- Ashenhurst TA lease due to be signed imminently. Sharples House TA – 3 flats occupied

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Preventing Homelessness and Rough Sleeping Strategy
2. Temporary Accommodation Placement Policy
3. Emergency Accommodation Procurement Framework
4. Regular monitoring and management oversight of all temporary accommodation placements – new two stage approval process now in place
5. Governance structure in place via Homelessness/TA Transformation Board which has oversight of TA demands and pressures in particular
6. Implementation and the effectiveness of the revised Kirklees Allocations Policy is monitored quarterly by a joint HSS/H&N Implementation Group. Portfolio Holder is briefed bi-annually on performance of the Policy
7. Collaborative working with Housing Growth to ensure housing supply pipeline provides options for low income and benefit dependent households

Further actions underway:

1. Development of private rented sector options to divert customers from TA, provide swifter 'move on' options and utilisation of flexible financial incentives
2. Review of all internal and customer facing communications throughout the customer journey to manage expectations and ensure the likelihood of securing differing types of alternative accommodation is clearly communicated
3. Ashenhurst scheme to provide additional 24 family units, target delivery Q2 25-26 with secondary scheme in pipeline for 2026-27 delivery
4. Transformation priority, with focus on reduction of B&B usage, expected to continue to support until end 2025-26
5. Effective utilisation of 2025/6 grants (HPG, RSI and new Emergency Accommodation Pilot grant) to maximise homeless prevention
6. Options to secure additional supply of TA through acquisition or lease from other landlords / providers reviewed on continuous basis
7. Dashboard under development to provide regular update on KPIs

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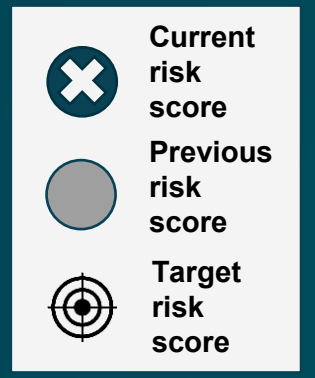
DEV03 Project Management & Delivery ***NEW***

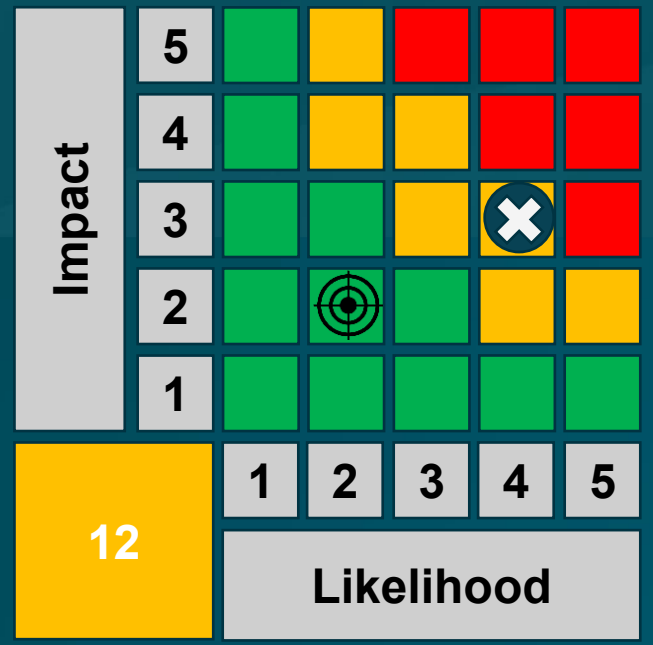
Failure to deliver approved programme of projects, in line with agreed budget, timeline and scope / quality resulting in inability to meet the objectives and aspirations of the organisation, improve service proposition, realise financial benefits and enhance reputation.

Risk Owner: David Shepherd, Executive Director, Place

Quarterly update:

1. Progress on delivery of Cultural Heart ph1 (construction) and ph2 (preconstruction)
2. Other key projects also making progress e.g. George Hotel, CX (Housing management)
3. Resetting of capital plan to align with priorities, considering revised costs , available resources etc





Controls in operation:

1. Formal Project Management approach (Prince2, Agile etc)
2. Clear approach to project governance including roles & responsibilities, documentation and escalation routes
3. Key stakeholders (Procurement, Finance etc) engaged at outset and sign off agreed business case
4. Where funding is provider by WYCA, collaborative working to align funding requirements and sign offs
5. Directorate Change Boards

Further actions underway:

1. Council wide review of governance and reporting of the capital plan to focus on affordability, improvements to forecasting and support delivery
2. Improvements in contract management capacity and capability
3. Centre of Excellence in project management (Transformation team)
4. Internal audit of transformation project delivery

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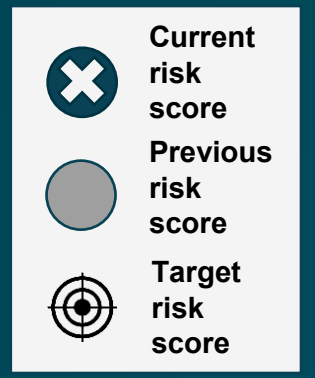
HN01 Housing Safety & Quality

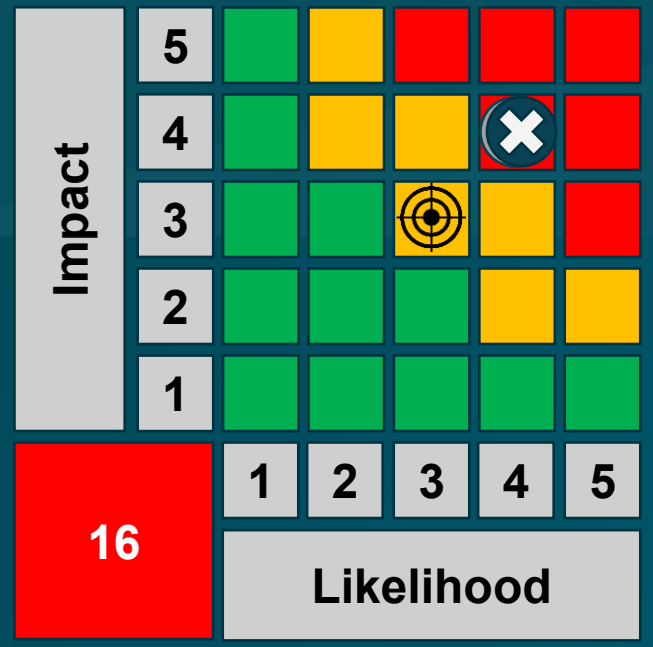
Risk that residential housing stock does not meet building safety regulations and / or the decent homes consumer standard resulting in service user dissatisfaction, complaints, regulatory scrutiny and reputational damage

Risk Owner: Phil Jones, Service Director Homes & Neighbourhoods

Quarterly update:

DMC backlog addressed and BAU service achieved. Fire safety assessments are ahead of schedule, with high-risk actions queued and mitigations in place. Turner & Townsend have moved from due diligence to delivery, with the first fire works contract awarded and tranche two in preparation. Decency levels have declined to 21.5%. The five-year capital programme is nearly complete and will be updated based on new stock condition data to address risks earlier. System upgrades due for completion (Cx Oct 25/ Total Jan 26). Capital Investment Board established.





Controls in operation:

1. Regulatory Notice action plan and monthly meetings with Regulator of Social Housing to review progress updates
2. Appropriate governance structure in place to monitor actions and provide oversight of controls with clear escalation routes and accountability points
3. Policies and supporting Management Plans in place for all elements of Building Safety and Voids process
4. Fit for purpose operational systems, upgraded as required to ensure they continue to meet operational and compliance reporting standards.
5. 30-year Asset Management Plan – informed by stock condition surveys
6. Tenant Satisfactions Measures reviewed on a regular basis to ensure outcomes improve in line with expectations
7. Principal contractor appointed providing additional project, programme and contract management capability across fire safety programme

Further actions underway:

1. Governance effectiveness review continues with focus on both membership and determining the required inputs to in scope Boards / Meetings
2. Review of 5 year Capital Investment Plan (£160m) will complete in Q2 2025-26. New Investment & Capital Assurance Board to provide oversight.
3. Stock condition surveys to inform future capital programme commencing in Q2 2025-26. 3 year programme with all archetypes surveyed in first 12 months informing prioritisation of future years activity.
4. Development of technology roadmap to understand H&N future technology needs of H&N and optimum solutions to meet these needs
5. Implementation of Cx, housing management system is underway and phase 1 scheduled for completion during Q2 2025-26
6. Monitor and review of consultation on changes to Decent Homes Standard and consider impact of proposed implementation timescales

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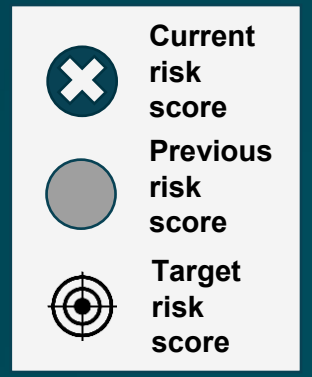
ECC01 Climate Change

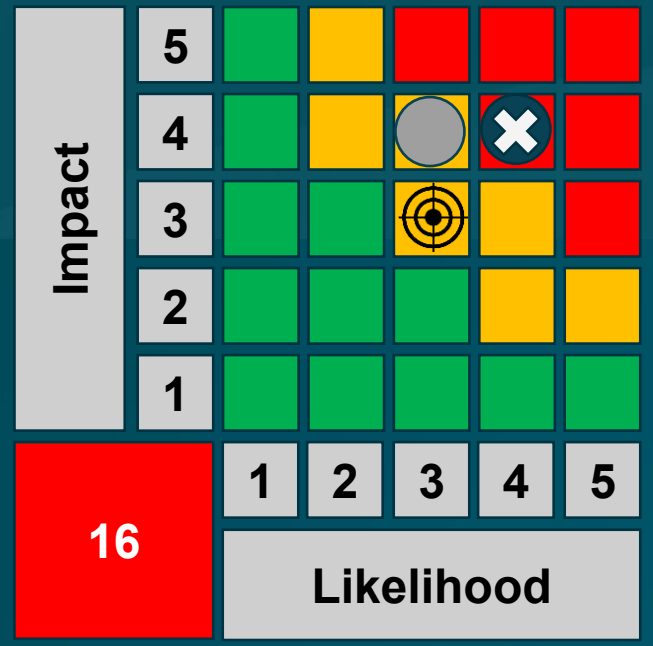
Failure to mitigate and adapt to a more volatile climate, caused by insufficient resource, inadequate funding and a lack of prioritisation, leading to prolonged impacts on the natural environment, residents, communities, businesses and delivery of Council services.

Risk Owner: Katherine Armitage, Service Director Environmental Strategy & Climate Change

Quarterly update:

The risk score has increased to reflect the ongoing impact from the absence of staff resource and the challenges faced by the team to recruit to critical posts, impacting the ability to use grant funding. Recruiting to key roles is challenging, consultancy support being utilised as an interim position.





Controls in operation:

1. Environment & Climate Change Scrutiny Panel in place to check & challenge work from the legacy Environment and Climate Change Service Area
2. Business continuity plans respond to severe weather event impacts, which are being made more extreme by Climate Change
3. Climate Change consideration included within the Integrated Impact Assessment which all new Council funded projects are required to complete
4. Climate Change and Environment Sustainability training is available on My Learning for Officers and Members, Completion rates are being tracked but remain low
5. Top tier partnership strategy, 'Environment Strategy; Everyday Life' in place following approval by Council in September 2024

Further actions underway:

1. A new approach to the Councils direct, operational Greenhouse Gas Emissions has been completed in draft and is currently going through governance for approval. This provides a new baseline of emission to inform future decision-making and required actions to for rapid emission reduction to achieve the authorities Net Zero by 2038 target.
2. Intention to recruit to the currently vacant staff positions to manage the Councils response to Climate Change and Environmental Sustainability.
3. HR have been engaged to support a review of positions, job profiles, consider market rate supplements and team structure to support recruitment and retention.
4. External consultancy to undertake an in-depth review is currently being considered, supported by Gainshare resources.

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Kirklees COUNCIL

Report title: Council Budget Strategy Update: 2026/27 and future years

Meeting:	**Cabinet / Council**
Date:	**9th / 17th September 2025**
Cabinet Member (if applicable)	**Cllr Graham Turner**
Key Decision **Eligible for Call In**	**Yes**

Purpose of Report

To determine the Cabinet's approach to the annual update of the Council's Medium Term Financial Strategy (MTFS). This is reported to Full Council each year and sets a framework for the development of draft spending plans for future budgets.

Recommendations

Cabinet are asked to recommend the following :

- note the key risks to the delivery of the budget in 2025/26 outlined in the Quarter 1 Financial Monitoring report and that these will be subject to consideration as part of the Budget Monitoring reports submitted to the Cabinet on a quarterly basis;
- note the uncertainty as to the precise level of future funding for the Council & the assumptions around the potential impact of Fair Funding Review 2.0;
- note the update and the revised budget gap to the MTFS for the period 2026/27 to 2030/31 as shown at ***Appendix A*** and that in view of the uncertainty with some of the assumptions upon which the Strategy is based, that it will remain under review as the Council's budget process progresses;
- note that there is a significant gap of c£18m in 2026/27 which requires either reduction in budget pressures and/or new savings proposals to be brought forward.
- note the scenario analysis shown at ***Appendix C*** which models 'worst'/'best' case scenarios around the baseline MTFS as part of the assessment of potential risks facing the Council;
- note the current Capital Plan shown at ***Appendix D***, reflecting updated General Fund funding assumptions prior to the completion of the Capital plan review and a revised HRA Capital Plan with updated funding;
- agree the MTFS as set out in the report; and that this report will be presented at Council on Sept 17th for noting and debate. There are no budget decisions associated with this report at this time.
- in consultation with relevant Cabinet Members, request Officers to identity and bring forward budget savings proposals as part of the provisional budget report

which will be initially considered by Cabinet in December 2025 and then a final budget report will be presented for approval by Cabinet (and then Council) as part of the development of the final budget for 2026/27 in February 2026; (subject to consultation as set out below)

- note that funding assumptions made in this report may be subject to change when the provisional local government finance settlement is published by Government (expected late November)

- note the timetable set out in **Appendix E** of the report for the development of the Council's Budget for 2026/27;

- note that it is proposed to undertake consultation on the budget proposals in late 2025 with a view to informing decisions on the Council's budget for 2026/27.

- subject to the continuation of the Business Rates Pooling arrangements, give delegated authority to the Chief Executive and the Service Director Finance, in consultation with the Leader and the Finance and Regeneration Portfolio Holder, to determine whether the Council should continue as a member of the Leeds City Region Business Rates Pool in 2026/27.

Reasons for Recommendations

- To ensure that the Council has a sustainable budget over the medium term to deliver the Council's priorities.

Resource Implications:

This report develops the financial planning framework for the 2026/27 budget and beyond. All relevant financial implications are contained in the report and appendices.

Date signed off by <u>Strategic Director</u> & name	**Rachel Spencer-Henshall – 1st September 2025**
Is it also signed off by the Service Director for Finance?	**Kevin Mulvaney – 29TH August 2025**
Is it also signed off by the Service Director for Legal Governance and Commissioning?	**Sam Lawton – 29th August 2025**

Electoral wards affected: All

Ward Councillors consulted: All

Public or private: Public

Have you considered GDPR: Yes – there is no personal data within the budget details and calculations set out in this report and accompanying Appendices

1. Summary

1.1 Under the Council's Constitution, the Cabinet is required to submit a Budget Strategy Update to the Council no later than October in each year. Commonly known as the Medium-Term Financial Strategy (MTFS), this report sets out a framework for the subsequent budget setting process and future financial planning.

1.2 At the meeting of the Council on 5th March 2025, the Council approved its Budget for 2025/26. As part of this, approval was also given to the MTFS for the period to 2026/27. The MTFS sets out the Council's financial plans detailing income and expenditure over the medium term. Acknowledging that the Council is operating in a dynamic environment and that the assumptions underpinning the MTFS is subject to change, it is good practice to review and update the Strategy on a regular basis to ensure that the Council has a good understanding of its forward financial forecasts and to support planning for the development of the budget in 2026/27 and subsequent years.

1.3 In common with local authorities across the country, the council has faced challenging financial circumstances in recent years. Increasing demand for services and a cost-of-living crisis, alongside limited government funding, have necessitated difficult decisions to be made on services and investment in Kirklees. The updated MTFS illustrates the extent to which the council has now stabilised its financial position to support the Council's priorities

1.4 The period of the commencement of this financial strategy coincides with significant changes expected to Government funding to all Councils through Fair Funding 2.0 and the planned implementation of multi-year settlements. Fair Funding 2.0 was released as a consultation document in June 2025 and the Government response is expected in October 2025. Councils are expected to receive the provisional local government finance settlements in late November. This report makes a number of prudent assumptions with regard to the impact of Fair Funding 2.0 for Kirklees.

1.5 The update to the MTFS is also necessary in the context of the Council's outturn for 2024/25, and the Quarter 1 Budget Monitoring position for 2025/26 reported to Cabinet on 9th September 2025 and a reassessment of likely pressures over the next five years from services. The 2024/25 outturn position on the Council's General Fund Revenue Budget was an overspend of £5.6m and the latest monitoring position at Quarter 1, indicates the Council is forecast to overspend by £5.9m in 2025/26.

1.6 The General Fund projection for 2025/26 is the lowest Q1 forecast overspend since COVID. The projected overspends in each of the last few years at the equivalent period and outturn are shown below

	Q1 Projection (£m)	Outturn (£m)
2022/23	24.6	27.0
2023/24	20.3	7.3
2024/25	12.9	5.6
2025/26	5.9	-

1.7 Despite the Council's improved position, local authorities will continue to face challenges to maintain financial sustainability and stability in the coming years. These challenges are driven by increasing demand for services in social care services for adults and children as well as increasing costs for temporary accommodation for residents who need that support.

1.8 It is evident that the additional resources that were included in Directorate base budgets as part of the 2025/26 budget are having the desired effect. The size of the projected overspend is lower and the number of variations fewer.

1.9 There is an cumulative estimated budget gap over the five year of the MTFS to 2030/31 of £56.3m with the most immediate issue being a forecast gap in 2026/27 of £17.9m. This is partly caused by the ongoing nature of demand and cost pressures, particularly in social care, which need to be provided for in the financial strategy. Table 4 outlines the range of the total in year pressures from c£18m to c£4m in the later years of the plan.

1.10 A series of additional mitigating measures will be considered to reduce the Council's net expenditure and assure a continuing balanced budget position. At the same time, a review of the Council's Capital Programme is underway. These actions will both support the overall budget position and build the Council's reserves so that they remain above the minimum requirement. They also align with the Council's principle to live within its means.

1.11 Given the significant reduction in reserves over recent years, there is also a need for the Council to ensure it can maintain an adequate Minimum Working Balance and start to build back reserves to provide the Council with financial resilience and capacity. This strategy does that by providing for increases in the General Reserve and the Voluntary Revenue Provision Reserve.

1.12 The MTFS is prudent and realistic about the financial challenges Kirklees Council will in the coming years. Nevertheless, the Council's position is favourable in relative terms to similar local authorities in England and the Council can also reasonably expect central government funding to improve. This will allow the MTFS to support the Council to deliver the aims set out in the Council Plan and gives it choices in the way it is able to distribute funding for services and investment in Kirklees.

1.13 The four key Council priorities are:-

1.14 **Getting the basics right - a balanced budget and a modern organisation**. The Council must live within its means and not spend more money that it has available. It is essential that services fully understand their budgets and can deliver outcomes within their budget envelope by spending money wisely, being as efficient as possible and to deliver value for money for residents. The MTFS commits to providing resources each year to fund transformational activity to help support the journey to being a modern organisation.

1.15 **Protecting the vulnerable and achieving inclusion**. The MTFS recognises significant demand pressures in those Directorates that help support its most vulnerable residents. In social care functions alone, there is an estimated £90m worth of rising demand and cost pressures meaning more of the Council's budget will be redirected to support those in receipt of these services.

1.16 **Thriving people and communities - now and over the longer-term**. The MTFS gives the Council the financial platform it needs to build safer, greener and healthier communities whether that is through its own services or in partnership with community organisations.

1.17 **Local economic growth, working with regional and national partners**. The financial strategy, particularly in relation to the capital plan evidences the ongoing nature of the Council's work with regional and national partners to help grow the local economy across Kirklees. Over £400m of the General Fund capital plan is funded by grants awarded by Government and the West Yorkshire Combined Authority.

2. Information required to make a decision

Budget Strategy for 2025/26

2.1 In setting the General Fund Revenue Budget for 2025/26, the Council agreed the following key matters are part of the budget strategy:-

- net budget growth of £50.7m to reflect increases in demand for services, structural deficiencies in some income budgets and inflationary pressures;
- savings totalling £26.8m to be implemented so that the full effect of the saving impacted in 2025/26;
- net transfer of £8.3m into Earmarked Reserves to support specific spend requirements and the replenishment of service transformation reserves and general reserves.

Quarter 1 Budget Monitoring

2.2 The Council's Quarter 1 General Fund Revenue Budget monitoring position, reported to Cabinet on 9th September estimated that the Council is forecast to overspend by £5.9m in the current financial year as summarised in the Table below:-

Table 1: Quarter 1 Budget Monitoring 2025/26

2025/26 Forecast – Quarter 1

	Revised Budget £000	Forecast Q1 £000	Variance Q1 £000
Children and Families	86,594	90,521	3,927
Adults and Health	110,586	112,271	1,685
Place	54,741	57,693	2,952
Public Health & Corporate Resources	61,468	61,191	(277)
Central Budgets	73,901	73,551	(350)
General Fund	**387,290**	**395,227**	**7,937**
Use of Budget Contingency Reserve	-	(1,993)	(1,993)
Adjusted General Fund Total	**387,290**	**393,234**	**5,944**

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2.3 Whilst the position of a projected overspend of £5.9m needs to be addressed, Cabinet are reminded that the equivalent Q1 report in 2024/25 indicated an overspend of £12.9m and at outturn the overspend had reduced to £5.6m. It is evident that the additional resources that were included in Directorate base budgets as part of the 2025/26 budget are having the desired effect. The size of the projected overspend is lower and whilst there are still some variations, as described below, these are fewer in number.

2.4 One of the key tenets of the refreshed Council plan is that the Council lives within its means. Where Directorates are projecting an overspend, it is expected that proposals will be brought forward to bring their budgets into balance. It is recognised that some areas of the budget can be subject to extreme volatility and the budget contingency reserve will be used to help in certain circumstances. The remaining balance on this reserve is £1.5m.

2.5 On a day to day level, it is expected that budget holders take all appropriate actions to manage budgets and to live within their means.

- Budget holders ensuring that they spend what is required for the delivery of the outcomes for their services by prioritising expenditure accordingly.

- Continuing to explore all external funding opportunities to bring additional income into the Council.

- Recruitment to vacant budgets remains subject to approval by Executive Directors and the Head of People Services and the S151 officer.

- Until the review of the capital plan is complete, no additional schemes requiring Corporate borrowing will be added; although invest to save cases will be considered subject to the submission of evidence based business cases.

- Continuation of the asset disposals programme to be bring in funding to support the capital plan and to reduce the need for borrowing.

Overarching Principles of the Financial Strategy

2.6 A sustainable financial plan is required to help ensure the Council is well placed to achieve its ambitions as set out in the Council plan.

2.7 The Council will become more sustainable by reducing the reliance of one off funding sources, such as reserves, to fund recurring expenditure and it must continue to make an appropriate provision to top up its unallocated (general) reserve to ensure that on a risk based approach this reserve is always above a minimum level and seeks to reach a desirable level over the medium term. This strategy provides the removal of use of reserves supporting base expenditure by 2028.

2.8 The strategy will also provide specific funding for the creation of certain earmarked reserves to continue to fund transformation costs that will be required to deliver service change across the Council. This change can help deliver its ambition of being modern efficient Council.

2.9 The strategy also recognises the need to provide the Council's agreed contribution to the SEND Safety Valve plan at c£10.6m, the first contribution is being made as budgeted in 2025/26.

2.10 This financial plan aims to provide funding to address known pressures in the base budget and will make appropriate provision for inflation (pay and prices) and a reasonable assessment of demand pressures based upon the latest available information. In the main these are the demand pressures being reported in Q1 financial monitoring.

2.11 In general, fees and charges to the public are assumed to be increased annually by 3%; however, where costs rise beyond this, services will continue to seek to recover full costs in line with the Council policy on fees and charges - so as to not to create additional burdens on the general fund. Charges for users of Adult Social Care services will continue to be based on assessment of a clients' ability to pay.

2.12 The Capital plan will continue to be subject to review and presently no new schemes have been added to those already in the plan. It is likely that as part of the ongoing review, some schemes will need to be slipped or removed from the capital plan.

2.13 In this review new capital schemes will be considered for inclusion in the Capital plan as part of the Council's investment and modernisation programme if they deliver ongoing revenue savings against the base budget; or are required to meet health and safety priorities or on the basis that new bids are assessed as a greater priority than existing Council funded schemes which would subsequently be removed.

2.14 Collectively, these principles are designed to continue the work from last year to ensure the base revenue budget is robust and affordable and one from which Members can make decisions on savings proposals that will be required to delivered a balanced

budget and set the framework for the setting of the 2026/27 budget to be considered at Cabinet in December 2025 and subsequently to be approved at Budget Council in early 2026.

2.15 By recognising the ongoing pressures within the base budget the S151 Officer is content that this continues to ensure the Council has a robust budget going forward, but recognising the need for savings across services to be able to set a balanced budget for 2026/27.

Risk and Uncertainty within the Financial Strategy

Fair Funding Review

2.16 As part of the 2024/25 Local Government Finance Settlement consultation, Government sought views on the approach to determine new funding allocations for local authorities. This encompassed numerous aspects, including the overall guiding objectives and principles, measuring differences in deprivations demand and costs, along with differences in locally available resources.

2.17 In June 2025 Government published the Fair Funding Review 2.0 (FF 2.0) and consultation, which ran until 15 August 2025. This seeks views on the approach proposed to determine new funding allocations for local authorities. The overall intention is to target money where it is most needed, with an updated evidence-based approach to take into account different needs and costs faced by local authorities, as well as their ability to raise council tax (the taxbase).

2.18 Fair Funding Review 2.0 represents a comprehensive reform of the local government finance system, aiming to better allocate funding based on councils' relative needs and resources. The review introduces various new relative needs formulae, a resource adjustment, and a business rates reset and with a three-year transition, so as to dampen any financial impacts across individual authorities.

Relative Needs

2.19 The Government propose to reduce the number of formulae used in the assessment of Councils' relative needs from 15 down to 9. Two new formulae are in the 9, being Temporary Accommodation and Home to School Transport, although their relative weightings are small. The table below shows the proposed relative weightings within the overall Relative Needs Formulae (RNF).

	Selected RNF Weightings
Adults' Social Care RNF	37.54%
Foundation Formula	27.12%
Children and Young People's Services RNF	23.18%
Fire & Rescue RNF	4.30%
Highway Maintenance RNF	3.20%
Home to school transport	3.24%
Temporary Accommodation RNF	1.42%

2.20 The Foundation Formula element essentially provides an assessment of need for all Council services that aren't covered specifically in the other formulae. One of the key elements of that formulae is population change and in relative terms Kirklees low population increase over the past decade in comparison to other Councils is part of the reason why the Council is likely to see a reduction in its total relative needs assessment.

2.21 Cabinet is reminded that the FF 2.0 remains a consultation and the Government 's response is awaited. The consultation included questions on the proposed formulae supporting each element. It is evident that there will be differing views on the underlying formulae and weightings of those formulae across the sector.

2.22 In the models Kirklees has used for this MTFS, the working assumption is that there will be a reduction in its Relative Needs Assessment of around 2.5% (from a national share of 0.78 to 0.70 of the total local government needs assessment). This is not confirmed as changes to RNF may be made following consultation and also from an update of 2024/25 data when this is available.

2.23 Any changes to relative weightings of the RNF, the formulae and data used behind each individual needs areas will change the relative needs assessments of each Council. Clearly changes to Adults, Children's and Foundation formula assumptions will have the biggest impact as they are by far the most significant weightings when assessing relative needs.

Council Tax Equalisation

2.24 A key element of FF 2.0 is the proposal to redistribute resources through 100% Council Tax equalisation. Kirklees has a relatively low tax base with around 80% of its Council tax base in Bands A-C and therefore the ability to raise resources locally is limited in comparison to many Councils across England, but particularly in comparison to those in London and the South East.

2.25 Full Council tax equalisation is essential to delivering FF2.0 and this is a point the Council has stressed in its response to the consultation. As with relative needs assessments, there will undoubtedly be differing views from Councils on this, with some likely to push strongly for a reduced level of equalisation. Whilst Kirklees RNF is expected to fall, it will gain more through additional funding from equalisation.

2.26 Government within FF 2.0 consultation documents has assumed that all Council's with social care responsibilities will increase Council Tax by 4.99% in each year.

2.27 It should be noted however, that as part of the Fair Funding Review, there will also be a full business rates reset, reflecting an updated assessment of local needs and resources. The impact of this is not yet known and could have either a detrimental or positive impact on the level of income we receive from the business rates system, again this will not be understood until late 2025. However, this along with RNF and resource equalisation needs to be considered in the round.

2.28 There is still some uncertainty on what impact this updated approach will have on the Council's total funding levels. However, with the new approach recognising need, deprivation and low taxbases collectively, it is anticipated that there will be a potential increase in the total funding made available to Kirklees compared to previous funding assumptions. The precise extent of which will not be known until late 2025 when the provisional local government finance settlement is announced. Any gains (or losses for Councils) are expected to be spread over 3 years as part of transitional arrangements. However, it is expected those who 'lose out' will push for a longer transition period. Kirklees has responded to the consultation, agreeing in principle for a transitionary period, but this needs to be kept in line with the multi-year settlement.

2.29 In briefings with MHCLG, Civil Servants have advised Councils that the figures used in the consultation and models that Councils use are not confirmed and may be subject to change, either as a result of changes arising out of consultation responses, updates of relative needs by using the most up to date data in formulae and also the fact the final policy decisions have not yet been made by Government. The expectation is that the models will be refined over the next few months as more information is made available.

2.30 Until recently, these models had not been seen by MHCLG and so projected changes for individual authorities are uncertain. There have been many different iterations in the past 8 weeks as the models as more information is available and MHCLG provide clarifications to specific questions from Councils / representative bodies. This has made it difficult to analyse the proposals with certainty. The models have also highlighted various disparities both between different types of authority (e.g. Metropolitan or District Councils) and also within each type of authority. Whilst these inconsistencies persist, there remains uncertainty around the absolute accuracy of the models on an individual authority basis (any adjustments to resolve individual inconsistencies, will likely affect all authorities).

2.31 However, MHCLG have made available significant amounts of data to enable the models to be updated earlier than in previous years and has allowed Councils to make assumptions around the future funding position. Whilst Kirklees can reasonably expect funding gains in each of the next 3 years, until these are confirmed a prudent approach to modelling these gains in the MTFS is required.

2.32 Having considered the pressures the Council will continue to face, particularly in the social care sector, the MTFS assumes that Council Tax will rise annually by 4.99% (in line with Government assumptions) and a prudent assumption of 60% of the current modelled funding gain is assumed. In 2026/27 this is worth c£6.7m, but around £1m p.a.

lower in future years as Government has front loaded funding to some extent.

2.33 Government has committed to announcing a multi-year local government finance settlement in late 2025, which is expected to cover a period of three financial years from 2026-2027 to 2028-2029.

Risk

2.34 Pay and inflationary pressures remain a risk over the longer term. Whilst inflation at 3.8% (July 2025) is now currently above the Bank of England target level of 2%, the longer term forecasts suggest inflation reducing towards the target. However, whilst ever inflation remains above targets, there remains a risk that pay awards and the cost element of demand budgets may be higher than currently provided for which would increase the gap.

2.35 There are a number of significant budgets particularly in social care and certain income budgets which are subject to demand and demography changes. Whilst this plan tries to adequately reflect those pressures based on the latest information, there is a risk that these pressures are under or overstated.

2.36 There is a risk that interest rates remain at the current level which could add additional pressures to the revenue budgets. The MTFS currently assumes all new borrowing, including refinancing of existing loans is at 4.69%. Presently longer term rates remain above this level, although it is now possible to borrow short term at around or below this level. All borrowing undertaken will be made within the approved limits of the Treasury Management strategy. There is capacity within the existing Treasury Management strategy to take relatively more short term borrowing at this time.

Update of Medium Term Financial Strategy (Revenue) 2026-2031

2.37 Since the meeting of Council on 5th March 2025 work has continued to update the Council's MTFS for the period to 2030/31. A summary of the updated MTFS is provided in the Table 2 below with an analysis by Directorate shown at ***Appendix A***:-

Table 2: Medium Term Financial Strategy 2026/31

	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	2030/31 £m
Opening Balance	**-**	**17.9**	**35.5**	**45.0**	**52.5**
Funding & Reserves Changes	**(18.2)**	**(19.9)**	**(24.7)**	**(22.8)**	**(26.1)**
Add back savings fall out	0.1	-	0.3	0.3	-
Demand pressure	13.7	11.3	11.4	10.1	10.1
Inflation/pay pressure	18.2	15.8	15.3	16.8	17.0
Treasury management pressure	4.5	6.4	2.5	0.5	0.2
Other pressure - expenditure	1.4	4.5	12.0	2.8	2.8
Other pressure - income	1.7	1.1	0.9	-	-
Funding Fall-Out	0.8	0.4	2.1	-	-
Funding increase	-	(1.4)	(10.0)	-	-

Existing Approved Savings	(4.3)	(0.5)	(0.3)	(0.2)	(0.2)
Total Spend Changes	**36.1**	**37.5**	**34.2**	**30.3**	**29.9**
Funding 'Gap'	**17.9**	**35.5**	**45.0**	**52.5**	**56.3**
In Year Funding Gap	**17.9**	**17.6**	**9.5**	**7.5**	**3.8**

See Appendix A

2.38 As the table indicates, the forecast funding gap for the period to 2030/31 is now estimated to be £56.3m with the most immediate issue being a funding shortfall in 2026/27 of £17.9m. From a spend perspective, it is demand and inflation pressures that dominate, especially in the social care services. **Appendix A** provides a summary by Directorate.

2.39 To put these variations into context, for 2026/27 specifically, total available budget is forecast at £461.8m with an initial assessment of spending need identified by Directorates at £479.7m which creates 'the gap' of £17.9m. Further details of the assumptions and main pressures are outlined below.

Specific Funding Assumptions (£18.2m)

2.40 The Council's net revenue budget is primarily determined from the amount of Council tax collected and funding provided from the Government Settlement Funding Assessment (SFA) with adjustments made with either contributions to or from reserves to support the overall total base budget for service provision.

2.41 In respect of Council Tax and the Adult Social Care precept, this plan assumes an annual increase equivalent to 4.99%. This is based on the increases of core council tax (2.99%) and the social care precept of 2%. These assumptions are consistent with Government assumptions with regard to Core Spending Power increases in the FF2.0 consultation. A reduction of 1% would result in a reduction in council tax funding of c£2.5m per annum and would have a compounding effect if this was applied in the early years of the plan.

2.42 From 2027/28 onwards there is an assumed increase in the Council tax base of 0.7%, equivalent to circa 800 Band D homes per annum. This will be reviewed in discussion with Planning/Housing growth teams with regard to the expected growth over the MTFS. No growth is assumed in budget terms for 2026/27 as any growth realised in that year is assumed to be required to help fund the Collection Fund deficit rather than be used to provide for additional budget for services.

2.43 Business Rates income is inflated by approximately 1% per annum over the duration of the plan.

2.44 Updated plans for 2026/27 also include repayments to the collection fund of £3.2m and the contribution of £10.9m into earmarked reserves. (see para 2.69)

2.45 Increases in Government Funding are estimated to be in the region of £6.7m in 2026/27, and £5m per annum in 2027/28 and 2028/29. These uplifts include prudent estimates of additional funding due to Kirklees as a result of the funding reforms noted earlier in this

report. Increases after this point are linked solely to inflation, with updated plans reflecting uplifts of c.2% (£4m) per annum.

2.46 Given that the outcomes of Fair Funding 2.0 Review and Business Rates Reset are not fully known, there is an element of risk surrounding any government funding assumptions made at this time. The specific funding increases noted above in para 2.31 recognise this and reflect what is considered to be a reasonable estimate of the impact of the funding reforms on Kirklees - based on the information and modelling available to date. It should be noted that the figures illustrate just one of many possible outcomes, and more certainty will only be provided when the Local Government Provisional Finance settlement is published (expected to be late November 2025). The sensitivity analysis included later in this report (and at Appendix C) includes an indication of the range of likely outcomes in relation to any gains from the funding reforms.

2.47 The funding reforms also include the proposed realignment of various grants into SFA for 2026/27. This means that some grants previously recognised within services, will be rolled in and paid through RSG going forwards. The result of these changes means that approximately £56m of grant budgets currently held in services will be removed for 2026/27, with this income being recognised within government funding figures instead. The impact of this is cost neutral to the council, however the adjustments will artificially inflate the changes from 2025/26 to 2026/27 of both net directorate budgets and funding levels. It is important to understand these are technical adjustments and do not provide for additional spending power.

2.48 The table below summarises the total and assumed variations in funding available to support the budget next year.

2026/27 Funding Build Up	Council Tax Income £m	Business Rates Retained Income £m	Govern-ment Funding £m	Collection Fund Re-payment £m	Use of Reserves £m	Total Funding £m
2025-26 Funding	(252.9)	(64.1)	(82.4)	3.8	8.3	(387.3)
Grant Realignment - Directorates to SFA	-	-	(56.3)	-	-	(56.3)
Updated Baseline	**(252.9)**	**(64.1)**	**(138.7)**	**3.8**	**8.3**	**(443.6)**
Funding Increase	(12.6)	(0.8)	(6.7)	-	-	(20.2)
Other Changes	-	-	-	(0.6)	2.6	2.0
2026-27 Funding	**(265.5)**	**(64.9)**	**(145.4)**	**3.2**	**10.9**	**(461.8)**

Executive Director Portfolio Assumptions:

Children & Families

2.49 This Council has invested in early intervention in Children's Social Care which has meant the numbers of Looked After Children (LAC) are low in relative terms when compared to other 'like' Councils. However, recently Kirklees has seen an increase in numbers of LAC. This combined with the mix of placements and associated costs are creating pressures on the budget, as reported in the Q1 Financial monitoring report.

2.50 As part of the MTFS approximately £5m of additional funding is proposed to be invested into Children's Services for 2026/27 (prior to savings targets). A large part of this (£3.5m) is to support demand led sufficiency pressures relating to increasing numbers of LAC. In the first 4 months of 2025/26 there has been an increase in LAC from 635 to 645 and a subsequent increase in External Residential Placements numbers from 34 to 44 and based on these trends, the additional investment has been proposed. There is also an assumed uplift in fees of around 4% which adds £1.6m of costs to the LAC budget.

2.51 In future years, 2027/28 – 2030/31, investment of £2.4m p.a. is proposed. This is to reflect an assumed, but smaller, increase in demand and cost in relation to demand led Children's budgets.

Adults & Health

2.52 As part of the MTFS approximately £16m is added in relation to Adults demand led pressures for 2026/27. Of this, £8.4m is related to demand (volume increases) and c£7.6m is inflationary for uplifts in care fees (using CPI assumptions and the estimated impact of the National Living Wage (NLW). For 2026/27, the MTFS assumes a median point of the Low Pay Commission estimate of NLW at £12.71/hr, currently £12.21 p/hr).

2.53 A further £1.8m (£600k per annum) over the next 3 years of the MTFS is recognised as a pressure relating to client contributions. A target of £2.5m had been proposed in previous budgets, but having reviewed this is, it is now considered unlikely to be achievable as client contributions are based on an assessed ability to pay. This figure will be kept under detailed review as part of the Adult Social Care transformation project and later years will be reduced if income levels achieved are beyond these figures.

2.54 As part of last year's agreed budget, the Directorate had savings targets of c£2.4m to deliver in 2026/27, as well as c£14.4m to deliver in 2025/26, with the latter being tracked and reviewed to ensure they will be achieved, or whether alternative proposals are required. The MTFS makes no changes to this £2.4m assumption.

Place

2.55 Significant pressures have been identified in the Place Directorate which require additional budget provision to reflect ongoing demand pressures.

2.56 A total of £2m is proposed to be added to the Home to School Transport budget. £1.5m to correct the base budget and a further £0.5m for projected increases in demand for provision and cost increases in 2026/27. Future estimates of demand are difficult to predict and may be affected by forthcoming proposals from Government on SEND provision. Beyond 2026/7 a sum of £600k per annum is provisionally included in the financial strategy. The current year projected overspend is being funded by the use of the Budget Contingency reserve, but this is a one off source of funding and adjustments to the base budget are required.

2.57 The adverse weather base budget is currently c£1.5m. There have been a number of agreed budget savings including the Council acquiring its own fleet and a review of primary gritting routes. Despite these savings, the cost of responding to adverse weather events (ice, snow, storms etc) has typically outturned nearer than £2m mark. The financial strategy therefore recognises this and provides for a further £250k per annum for the next 2 years to reach a budget of £2m. It is also proposed, subject to the wider budget position of the Council at outturn, to transfer any adverse weather budget savings into an earmarked reserve. This ought to provide budget stability for the service to deal with a bad winter in any given year.

2.58 Parking services income has historically not achieved the base budget levels. Additional provision was made in the 2025/26 budget to reduce the income budget to recognise this and the financial strategy provides for a further £557k to bring the budget into line with actual income levels. Parking charges, as with other fees and charges, will remain subject to an annual review.

2.59 Within Parks and Greenspaces the budget for somewhile now has been partially funded by the use of S106 receipts and other short term funding. These balances are reducing and therefore a sum of £250k is added over 2 years to the base budget to remove the reliance on this funding.

2.60 Similarly, within the Climate Change team, some posts have been funded via WYCA grant. This funding was always short term in nature and the financial makes provision within the Council base budget of £167k for this team.

2.61 In Waste Management, the financial strategy reflects the estimated requirements of Simpler Recycling. The strategy assumes that Food Waste collections and associated capital costs will be funded by New Burdens and capital grants. DEFRA have previously announced capital funding grants, but no announcement has been forthcoming on revenue funding regarding food waste. Due to the current Waste contract, the Council has an extension to 2028 to implement Food Waste collections.

2.62 Any legislative changes that are enacted with regard to Emissions Trading beyond 2028 are expected to be net neutral to the Council.

Public Health and Corporate Resources

2.63 A total of around £700k over 3 years is proposed to be added to the Council's central software licensing budget to reflect increased costs and the movement for a Microsoft Enterprise (E3) license to an E5 license. The council has delayed this move in recent years in order to keep costs down, but the move is now required in order to ensure technology supports improvements in services to the public, productivity and efficiency in back office services. The E5 license will enable significant improvements in digital service provision, the storage and sharing of files across teams, the management and presentation of data, and further benefits to the management of cyber security measures, complementing the council's existing strengths. The final cost of the license upgrade, which will ensure Kirklees remains in line with the rest of the local government sector, will be finalised during negotiations with Microsoft at our annual contract renewal point in December.

2.64 Demand pressures within Legal Services are estimated at £300k mainly due to the need to provide additional support to Children's services.

Other Cost Pressures

Pay Awards

2.65 As the Cabinet may be aware, the pay award for 2025/26 was settled in July 2025 at a rate of 3.2%. This was slightly above the amount 3% provided for in the base budget and the additional ongoing impact of the 0.2% has been provided for in future budgets. Looking ahead, the MTFS assumes pay awards of 3.5% for each year of the plan. Each 1% costs broadly £2.5m per annum on the Council's existing payroll costs.

2.66 Budgets for pay awards and inflation continue to be held centrally until they are agreed nationally or are contractually committed within service. Where there are no known contractual commitments, all other budgets are assumed to be cash limited to the current level of provision with no inflationary uplifts.

2.67 The financial strategy also provides for a 3% uplift in the 2026/27 levy payable to West Yorkshire Combined Authority (WYCA) to help support bus franchising across the region. Future increases are expected to be 2% p.a.

Treasury Management

2.68 Updated Treasury management budgets assume that the Bank of England base rate of 4.00% (as at 1st September 2025) is estimated to fall to 3.75% by the end of 2025 and remain at that level through to mid 2028. The updated MTFS reflects an assumed an average consolidated borrowing rate of 4.69% in the plan. This is based on the continuation of current borrowing strategy, which combines the use of both short and long term borrowing as set out in the 2025/26 Treasury Management Strategy report so as not to expose the Council to significant changes in interest rates in any given year. Long term borrowing remains relatively expensive at 6.01% (August 28th) for a 25 year loan and therefore the Council will seek to use relatively more short term borrowing within the allowable limits of the approved Treasury Management strategy. Up to 20% of total borrowing can be short term, and at the end of 2024/25 around 14% of borrowing was classed as short term.

2.69 Treasury management budgets also take account of updated capital plan borrowing requirements and associated annual revenue resources to be set aside to service Council debt. Within the MTFS, an additional £4.5m in 2026/7 and £14m over 5 years is currently added. These assumptions can change from changes to interest rates, reprofiling and reductions in the elements of the plan that is funded from Council borrowing.

Balances and Reserves

2.70 Any consideration of the Council's MTFS needs also to consider what reserves and balances are available and whether they are adequate. The Council holds both "earmarked" and "general/unallocated" reserves. The strategy for the use of these is outlined below; with forecast reserves balances illustrated in Appendix B.

2.71 **Earmarked Reserves** (for discretionary use) will only be used for the purposes for which they have been set aside and will be subject to annual review. The updated MTFS assumes a net transfer of £10.9m into Earmarked Reserves in 2026/27, including a £10.7m contribution to Voluntary Revenue Provision (VRP) reserves. This reflects the policy for provision of repayment of debt (MRP) approved as part of the 2024/25 Annual Budget report to Council in March 2024. By the end of the updated plan, the balance on the VRP reserve is in the region of £50m. This balance will be required in future years to pay for increased MRP costs and remains a key element of the strategy to provide financial sustainability over the medium to long term.

2.72 **General Reserves** are balances held as contingencies against risks such as emergency events. A risk assessment of the Council's level of reserves is carried out each financial year, when setting the budget and updating the financial plan. It is updated regularly during the financial year as part of the formal financial management reporting process. The risk assessment is based on the following key factors and an underlying presumption that significant risks need an appropriate level of cover: -

a) a review of known provisions and contingent liabilities;
b) the likelihood of overspend for either revenue or capital;
c) the likelihood of any additional income that would be credited to reserves;
d) the robustness of the Council's revenue budget proposals;
e) the adequacy of funding for the Capital Programme; and
f) any potential significant expenditure items for which explicit funding has not yet been identified.

2.73 Appendix F provides the risk assessment of the Council's level of general reserves, which estimates the value of the risks at £22.0m. Therefore, a current **Minimum Working Balance** of at least £22.0m needs to be maintained throughout the life of the current MTFP. The **Desirable Balance** calculation is £31m. As part of the budget setting process the risk assessment on the level of reserves will be refreshed.

2.74 The below table shows the projected level of General/Unallocated Reserve over the duration of the MTFP and reflects an assumption of annual contribution of £1.0m to the reserve. These figures include the Minimum Working Balance as outlined above.

31st March 2025 £m	31st March 2026 £m	31st March 2027 £m	31st March 2028 £m	31st March 2029 £m	31st March 2030 £m	31st March 2031 £m
(25.0)	(26.0)	(27.0)	(28.0)	(29.0)	(30.0)	(31.0)

2.75 The Council will ensure the reserves remain at an adequate level to manage effectively all future risks and liabilities, in particular whilst operating in the current volatile and uncertain environment.

2.76 The assessment of general and usable reserves is used by MHCLG, CIPFA and the Council's external auditors as a key measure of the Council's ability to deal with

pressures that could not be reasonably anticipated when setting the budget. Whilst there is no prescribed £m / % of budget to be held as a General reserve, however it must be of a sufficient size for the S151 officer to be able to issue a S25 report as part of the final budget report for 2026/27.

2.77 It is worthwhile reiterating that the reserves are a finite source of funding and should not be relied upon to support the Council's budget other than as part of the clear strategy to achieve a sustainable budget in the medium term. Acknowledging this, the Cabinet should note that any use of reserves will only be permissible with the agreement of the Service Director Finance.

General Fund Revenue Budget - Scenario Planning (Sensitivity Analysis)

2.78 As mentioned above, the MTFS is based on a range of assumptions which impact on both income and expenditure. Changes in these assumptions can have a fundamental effect on the Council's budget gap and the level of savings the Council will be required to make.

2.79 The Cabinet will appreciate that it is good practice to model scenarios based on changes to some of the key assumptions in the MTFS. The purpose of this sensitivity analysis is not to predict or forecast the future, but rather test and understand the Council's sustainability into an uncertain future given alternative plausible scenarios for the key drivers of costs, service demands, funding and key risks to which the Council is exposed. Such 'stress testing' is considered to be good practice and acts as an indicator of the Council's financial sustainability.

2.80 The sensitivity analysis gives some indication of the likely range of the Council's deficit position bounded by realistic worst- and best-case scenarios. The key variables that have been modelled with the results of this analysis at are provided at ***Appendix C*** and summarised in Table 3 below:-

Table 3: Scenario Analysis

	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	2030/31 £m
Best Case	12.6	26.0	31.5	38.5	41.8
Base Position (Table 2 above)	**17.9**	**35.5**	**45.0**	**52.5**	**56.3**
Worst Case	23.3	45.4	65.0	74.2	79.7

See Appendix C

2.81 As the table indicates, the range of potential positions is a five year deficit of c£41.8m to a deficit of £79.7m. These scenarios are provided to reflect the level of potential volatility in the assumptions and reinforces the uncertainty with future budget estimates.

Update of Medium-Term Capital Plan 2025/33 (General Fund)

2.82 At Cabinet on the 9th September 2025, Members considered an update position on the Council's Capital Plan as part of the Q1 monitoring report. On the General Fund around £7.2m of spend had been slipped from 2025/26 into future years, alongside a net increase in the plan of £0.4m due to increased grants/S106 contributions, leading

to a budget of £246.1m.

2.83 Since then, £8m has been re-profiled from 2025/26 into 2030/31 for the Investment and Modernisation Fund, leaving £2m for drawdown in this financial year as part of the implementation of this new Fund. A further £2.2m (£1.1m 2025/26, £1.1m 2026/27) has been received from Network Rail for the Transpennine Route Upgrade Programme. This supports activities undertaken by Kirklees Council in discharging the requirements of the Transport and Works Act Order (TWAO) between Huddersfield and Westtown (Dewsbury) via the appointment of suitably qualified persons to specialist roles.

2.84 The current budget of £239.2m for 2025/26 remains under review and a revised Capital Plan will be included as part of the Proposed Budget report to Cabinet in December. The latest Medium-Term Capital Plan for 2026/27 onwards is summarised in the table below and the funding breakdown is provided in more detail at **Appendix D.** This is the 'as is' position and the plan has not had any additional items added yet as the review is not completed.

Table 4: Medium-Term Capital Plan 2025/26 (General Fund)

	2025/ 26 £m		2026/ 27 £m	2027/ 28 £m	2028/ 29 £m	2029/ 30 £m	2030/ 31+ £m	Total £m
Expenditure								
Children and Families	25.7		29.6	21.6	3.8	2.8	0.0	**83.5**
Adults & Health	4.2		8.5	3.0	0.0	0.0	0.0	**15.7**
Place	198.6		223.5	121.8	77.9	97.9	46.3	**766.0**
Public Health & Corporate Resources	10.7		11.6	11.9	11.6	10.9	8.2	**64.9**
Expenditure Total	**239.2**		**273.2**	**158.3**	**93.3**	**111.6**	**54.5**	**930.1**
Funding								
Capital Grants / Contributions	122.9		113.5	66.7	45.2	49.4	4.0	**401.7**
Earmarked Capital Receipts	8.9		11.0	0.3	3.4	3.4	0.0	**27.0**
Service Funded Prudential Borrowing	16.4		30.6	17.2	10.0	12.1	8.0	**94.3**
Non-Earmarked Capital Receipts	1.3		1.1	1.2	0.7	0.7	0.0	**5.0**
Corporate Prudential Borrowing	89.7		117.0	72.9	34.0	46.0	42.5	**402.1**
Funding Total	**239.2**		**273.2**	**158.3**	**93.3**	**111.6**	**54.5**	**930.1**

2.85 Notwithstanding the regeneration aspirations of the Council and the commitment under the Safety Valve agreement to fund the rebuild of 2 special schools with Council borrowing supporting that in excess of £27.8m, there is need for the Council's Capital Plan to remain prudent, affordable and sustainable. This is particularly in the context of the significant pressure on the Council's General Fund Revenue Budget as set out above and as described above. The MTFS currently provides for an increase in treasury management charges of over £14m in the MTFS arising from a combination the Corporate borrowing shown in the table above and refinancing of existing loans. In

2025/26 around 38% (£c90m) of the capital plan is funded by Corporate borrowing, and over the life of the plan c£402m this is c43%.

2.86 Although the General Fund Capital Plan remains broadly the same as reported previously to Cabinet and Council in July 2025, some of the funding assumptions have changed. The capital receipts assumptions have been reduced from a current figure of £6m in 2025/26 to £2m by p.a by the end of the plan. The Capital Receipts reserve c£12m remains to be used as planned over the period, primarily as the agreed match funding for the Dewsbury Town deal. The assumptions around the future realistic value of capital receipts will be reviewed as part of the Capital plan and taking into account the findings of the review of Council wide assets being undertaken as part of the Transformation programme. Should additional receipts be deliverable over the period, then these should be primarily used to reduce the reliance on borrowing.

2.87 Given the extent of general fund borrowing that underpins the plan (£402m), the current and forecast cost of that debt, together with the required refinancing of existing debt as part of day-to-day Treasury activities, all uncommitted lines that require corporate borrowing within the plan are currently subject to review. This is being balanced against the future investment needs of the Council, both in maintaining the delivery of essential services through baseline funding, providing match funding where it is necessary to leverage external funding and to deliver ambitions around growth and regeneration.

2.88 Without pre-empting the outcome of the review, it is inevitable that some projects within the Capital Plan will need to be reduced, deferred or even stopped. As part of the review, the Capital Assurance Board will consider all investment needs via a 'scoring matrix' (see **Appendix E**) to help evaluate competing projects and inform the Councils priority schemes. The scoring from the matrix is subjective in nature but is a useful guide to help inform funding decisions especially in relation to borrowing. It is recognised other factors will influence the decision and it is ultimately the decision for the Council to make.

2.89 The key stages in the Council's prioritisation and approval process are as follows:

a) All uncommitted schemes funded by corporate borrowing within the existing approved Capital plan will be scored against the Matrix and ranked. Schemes will be slipped or removed from the Capital Plan based on the evaluation.

b) All new bids for borrowing require a detailed Business Case to be submitted to the Chief Finance Officer (Service Director – Finance) for consideration and evaluation by the Capital Assurance Board. The bids will also be subject to scoring against the Matrix and ranked.

c) Proposals for invest to save schemes which deliver ongoing revenue savings against the base revenue budget require a detailed Business Case submission, with funds recommended to be drawn down from the existing Investment and Modernisation Fund. As with all capital schemes, these will be scored and ranked using the Scoring Matrix.

d) The Capital Plan will be updated to reflect Council Priorities within an affordable funding envelope, recognising that some schemes will need to be removed to facilitate the addition of any new schemes deemed a higher priority. All new schemes to be supported will be recommended to Cabinet and Council for approval, in accordance with Financial Procedure Rules.

e) There will be a reset of baseline capital expenditure required to ensure Council services remain able to operate effectively. Typically baseline expenditure will cover investment in assets to address backlog maintenance and vehicle and equipment replacement programmes.

f) Schemes recognised as being 'pipeline' in nature due to their limited maturity and need for further development, will be placed on the 'Pipeline'/'Reserve' list. These will be kept under review, and should the need arise, an updated more detailed Business Case submitted as and when capital resources become available.

2.90 Further details of the review incorporating both existing and new schemes for the proposed Medium Term Capital Programme for 2026-2033 will be brought forward for consideration as part of the proposed budget report in December 2025. This will also include the new year 5 Baselines for the General.

Collection Fund

Collection Fund – Council Tax

2.91 The Collection Fund – Council Tax accounts for the income and expenditure associated with the collection of Council Tax. Council Tax receipts from residents are paid into the Fund. Precept payments to the Council, Major Preceptors (Police, Fire) and Parish Councils are paid out of the fund. Any surplus or deficit on the Fund is distributed to the Council and Major Preceptors.

2.92 In relation to Council Tax, it is assumed that the Council Taxbase will grow by 0.7% (c800 Band D Properties) annually from 2027/28 through to 2030/31. This will be reviewed as more information becomes available around the impact of any changes in Government policy with regard to planning and housebuilding. The ultimate collection rate is assumed to remain constant at 98.5%.

Collection Fund – Business Rates

2.93 The Collection Fund – Business Rates accounts for the income and expenditure associated with the collection of Business Rates. Business Rates receipts from businesses are paid into the Fund. Payments to the Government (50% of net debit collected), the Council (49%) (otherwise known as locally retained rates) and Fire Authority (1%) are made from the Fund. Again, any surplus/deficit on the Fund is distributed to the aforementioned bodies in the proportions set out.

2.94 The Council's share of locally retained Business Rates is Business Rates income is inflated by approximately 1% per annum over the duration of the plan.

2.95 As at 31st March the total Collection Fund deficit was £10.2m. The 2025/26 budget repays a sum of £3.8m and a further sum of £3.2m is required in each of 2026/27 and 2027/28 to clear the deficit.

2.96 As Cabinet will be aware, the Council is currently part of the Leeds City Business Rates Pool in 2025/26. That arrangement applies for 1-year only given the Government's tendency to seek applications to renew such agreements as part of the annual Local Government Finance Settlement. The benefit of the Pooling arrangement to the Council is the opportunity to receive a share of the retained levy on business rates growth across all Councils in West Yorkshire (the Council's share is estimated to be £0.5m for 2025/26).

2.97 Whilst no such request for applications to renew the Pooling arrangement for 2026/27 has yet been published, and subject to other Councils in West Yorkshire agreeing, it is assumed for the purposes of the MTFS that the Pooling arrangement will continue in its present form. As this is the case, and to ensure the Council is in a position to respond accordingly if a request for applications is made, it is recommended that Cabinet given delegated authority to the Chief Executive and Service Director Finance, in consultation with the Leader and the Finance and Regeneration Portfolio Holder to consider options and determine whether (or not) the Council should continue as a member of the Pool in 2026/27.

Dedicated Schools Grants (DSG)

2.98 As Cabinet may be aware, Dedicated Schools Grant is paid to the Council in support of the Local Authority's Schools budgets. It comprises four blocks of funding – the Schools Block, the Central School Services Block, Early Years Block and High Needs Block. It is the responsibility of the Council, in conjunction with their local Schools Forum, to determine the split of funding between their own expenditure and the Individual Schools Budget.

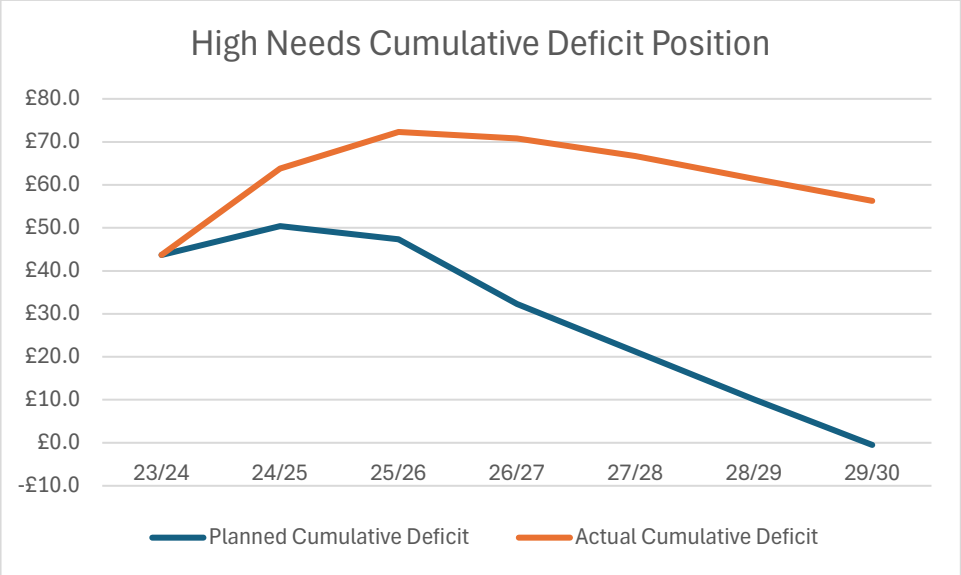
2.99 A more detailed report on Schools Funding arrangements will be presented to the Cabinet once details of the DSG Settlement are known for 2026/27.

2.100 In the meantime, in relation to the High Needs DSG Block and the Council's accumulated funding deficit, the Cabinet is aware from previous reports on this matter that the Council is part of the national Safety Valve Programme with the Department for Education. Under the Agreement with the DfE, which aims to bring back into balance the annual budget for High Needs provision and to reduce the historic deficit to nil, the Council will receive funding of £33.5m. The Safety Valve agreement for Kirklees has been extended from 2026/27 until 2029/30 as a result of increasing pressures relating to demand and complexity. Payments in relation to the agreement have been re-profiled to equal annual payments of £2.3m across 2024/25 – 2029/30 - £22m of safety valve funding has been received by 31/03/25. The DfE has recently confirmed that the Council will receive its next instalment for 2025/26.

2.101 The Council's SEND Improvement Plan includes significant capital investment in District SEND placement sufficiency over the next 5 years; including the re-location and placement expansion of two existing special schools to be funded through a mix

of prudential borrowing (£27.8m) and grant funding (£23.3m) totalling approximately £51m. Alongside this, further Government capital funding of £7m will be used to support the creation of more Specialist Provision across the District's maintained schools. The Improvement Plan also includes a Council-contribution of £10.6m and annual Council savings against High Needs spend. It was originally anticipated, as part of the Safety Valve Agreement, that by 2029/30 the budget would be in balance. As at Q1 2025/26, the projected deficit position at 2029/30 will be approximately £56.3m. The Improvement Plan resourcing assumptions described here are incorporated into the updated baseline MTFP and funding assumptions in this report as appropriate.

2.102 In 2024/25 the High Needs in-year deficit was £20.1m. This increased the cumulative deficit position to £63.8m. The graph below, indicates the trajectory of the cumulative deficit mapped against the planned deficit as detailed in the Safety Valve Agreement.



2.103 High Needs deficit positions remain a national issue and a significant number of Local Authorities are in a similar position with the cumulative deficit relating to High Needs expenditure now estimated at £5bn. This has doubled over the past 12 months (2023/24 – 2024/25) and it is clear that, based on trend information on demand and cost, the deficit figure will continue to grow in future years without Government action.

2.104 It is anticipated that the Government will publish a White Paper in Autumn 2025 and this will help to set out potential paths forward in relation to funding and reform for the SEND system. However, there will be a consultation phase and period of time to implement any changes and so it is unlikely there will be an immediate impact on the in year deficit position on the High Needs block. The Kirklees in year deficit is expected to reduce significantly from the capital investment and opening of 2 new special schools.

2.105 The DSG statutory override is a temporary accounting rule in the UK that allows local authorities to exclude Dedicated Schools Grant (DSG) deficits from their main revenue budgets. The override had been due to end in March 2026 but has recently been extended until March 2028.

2.106 It should be noted by Cabinet that DSG deficits at this scale have significant impacts on cash flows. Where cash is used to fund deficits, it has an impact on balances that could ordinarily have been used to fund capital in lieu of borrowing from the PWLB or other authorities. A deficit pf £63m costs around £3.5m to £4m to service. Kirklees and other Councils have raised this issue directly with the DfE.

2.107 It is still unclear what will happen to historic deficits if the override is removed but it is considered unlikely that in year deficits will have been fully addressed immediately even if there is reform within the system. At that point, deficits could become a further pressure on the General Fund for Councils and will need addressing in the same way existing pressures are managed. It is therefore imperative that the in-year deficits are significantly reduced with a clear aim of being removed in the next few years to ensure the risk to the general fund position is mitigated and the management of budgets and savings targets should be treated in the same way as other Council services.

2.108 Presently there is no additional provision beyond the commitments on the Safety valve (£10.6m) for additional general fund contributions to the High Needs Block. To do so would require the Council to find significant additional savings beyond those reported in this plan.

Kirklees Housing Revenue Account (HRA)

Background

2.83 The Council is required to maintain a self-financing Housing Revenue Account (HRA), which is ring-fenced from the Council's other budgets and is a record of all revenue expenditure and income relating to the authority's own housing stock. It is the responsibility of all councils with an HRA to ensure it sets a balanced budget and make provision for adequate resources to invest in council properties. This is to keep tenants safe and ensure that they are living in properties that meet a decent home standard including energy efficiency which will support tenants with the cost of living.

2.84 The Council regularly reviews and updates the HRA business plan with the aim to produce a self-financed and balanced budget position over the 30-year plan that delivers the key objectives. Over the next five years there is a cumulative revenue surplus of £9.9m which is to be used to fund capital expenditure.

Medium Term Financial plan 2026-2031

Service Activity	25-26 BUDGET AMENDED	26-27 BUDGET	27-28 BUDGET PROPOSAL	28-29 BUDGET PROPOSAL	29-30 BUDGET PROPOSAL	30-31 BUDGET PROPOSAL
	£m	£m	£m	£m	£m	£m
Total Expenditure	109.5	115.6	119.5	123.7	128.0	132.2
Total Income	(109.5)	(115.6)	(119.5)	(123.7)	(128.0)	(132.2)
Net Operating Expenditure	-	-	-	-	-	-

Key Income Assumptions

2.85 Rental Income – The Government sets rent policy for social housing and since April 2020, providers have been permitted to increase rents by up to CPI + 1% per annum (with the CPI rate taken at the previous September). This policy was suspended in 2023-24 and replaced by a 7% limit on annual rent increases and in its most recent policy update the Government committed to a 10-year settlement of CPI+1% from 1st April 2026.

2.86 The government received clear feedback in response to the previous consultation that the level of investment in new and existing social housing that is needed to deliver the government's ambitions will not be unlocked unless social rent convergence is implemented. A convergence mechanism was originally introduced in 2002, but was scrapped in 2015. The aim was to charge comparable rents for similar sized properties in similar areas, taking into account the value of properties and local earning levels and so a 'formula rent' was introduced. Formula rent refers to the formula that is used to calculate the rent that may be charged for a given property when it is let to a new tenant. Convergence would allow rents for social rent properties that are currently below 'formula rent' to increase by an additional amount, each year, over and above the CPI+1% limit, until they 'converge' with formula rent. The HRA MTFS assumes an average increase of £5.21 per week for 2026-27 taking into account CPI +1% and an assumption of £1/week relating to convergence..

2.87 Right to Buy (RtB) Sales – The Government introduced changes to the discount rates applied to right to buy sales, for applications received after 20th November 2024 and for 2024-25 Kirklees received 1,027 applications (2024-25, 332 applications). To reflect this increase in applications additional RtB sales have been assumed in 2026/27 at 180 sales, and then gradually declining to reflect the new less generous scheme with 140 sales for 2027/28, reducing to 90 sales per annum from 2028/29 to 2030/31 have been assumed. Right to Buy discounts remain an incentive for many people when considering whether to purchase their Council home, however due to recent discount rate changes it is anticipated that there will be diminishing Right to Buy sales in the future.

2.88 Other Income - The financial plan assumes service charges will rise by CPI+1% each year or where there is a plan to move to full cost recovery. A review of service charges is being carried out where the aim is, following consultation to move to a full cost recovery position over a three-year period, as previously approved in the budget.

2.89 PFI Grant - This grant remains fixed at £7.9m per annum over the life of the PFI contract.

Key Expenditure Assumptions:

2.90 Pay Award and Price Inflation - A pay award of 3.5% for the period 2026/27 to 2030/31 has been assumed. Price inflation is generally assumed at CPI levels in the plan.

2.91 Management Costs – Costs will be increased by 3.5% in 2026/27 and then will be linked to an increase of CPI each year. Energy Costs for gas and electricity are forecast based on the latest assumptions from the energy team as part of the Council contract for energy.

2.92 Repairs – An additional £3.8m has been added to the repairs budget to carry out stock condition surveys and retrofit assessments over a three-year period. The repairs

budget is to be inflated by CPI+1% each year and adjusted to reflect the forecast changes in stock numbers.

2.93 Disrepair Provision - Resolving disrepair remains a priority for the service. The financial plan assumes an annual budget of £1.5m for all legal costs including disrepair. Any repair costs following disrepair claims will be charged to the repairs budget. A provision has been set aside on the balance sheet, which will provide for the settlement of existing cases.

2.94 Provision for Bad Debt - A bad debt provision is provided for, based on 90% of former tenant arrears which at 31st March 2025 were £1.7m and 20% of current tenant arrears which at 31st March 2025 were £3m. Any write offs are made against this provision. A revenue budget of £1m is provided to maintain the provision at this level. This level of provision will be kept under review due to the number of tenants migrating from Housing Benefit to Universal Credit.

2.95 Capital Programme – The table below outlines the draft capital plan, however, this is subject to change following a review of works required to existing properties to achieve the decency standard. Any amendments will be reassessed and reprofiled based on affordability. The proposed capital investment requirement in the HRA over the next six years (including 2025/26) is £389m. This is broken down into Strategic Priorities and New Housing Supply of £118m and works to existing properties of £271m. There will be the requirement to borrow £125m over 5 years and to utilise £33m of RTB receipts, supported by transfer from HRA reserves.

CAPITAL PLAN - HOUSING REVENUE ACCOUNT	REVISED 2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	2030/31 £m	Total £m
Strategic Priorities/increased housing supply.	7.9	14.8	26.9	32.2	17.6	18.5	117.9
Works to existing properties	36.8	46.8	46.3	47.1	46.2	48.2	271.4
Overall Total	44.7	61.6	73.2	79.3	63.8	66.7	389.3
FUNDING SUMMARY							
Borrowing	-	25.0	25.0	25.0	25.0	25.0	**125.0**
Grants	2.0	3.3	6.2	8.5	3.9	5.2	**29.1**
Capital Receipts	2.1	1.7	9.6	14.1	2.2	3.0	**32.7**
Receipts from RTB allowable debt	3.9	3.3	3.6	2.4	2.3	2.3	**17.8**
HRA Revenue contribution to capital	12.7	2.8	2.5	2.3	2.5	2.5	**25.3**
HRA MRR (Depreciation)	24.0	25.5	26.3	27.0	27.9	28.7	**159.4**
Overall Total	44.7	61.6	73.2	79.3	63.8	66.7	389.3

2.96 Additional interest on borrowing charges - The plan reflects increased costs associated with servicing the HRA's debt to fund the Council's Housing Growth Programme (CHGP). The table shows the planned spend and the need to borrow circa £125m over the next 5 years. Maximum use of Right to Buy receipts will be made to minimise the impact of borrowing and where possible grant funding will be used instead of HRA borrowing. The HRA can benefit from discounted PWLB borrowing (0.4% reduction from standard rates). Whilst long term borrowing remains high, preference will be to use other funding sources funding first, however all new builds / buy backs remain subject to a business case to demonstrate they are viable over the life of the asset. Prolonged higher interest rates provide a risk that payback could be beyond the normal life but this is considered relatively low.

2.97 Recharges to the HRA - Recharges to the HRA relate to services provided from other parts of the Council on behalf of the HRA. These include, for example, back-office services such as HR, Finance, and IT as well as front facing services such as the

contact centre, hubs, community safety and environmental services. All these costs are subject to an annual review.

2.98 HRA General Reserve -The level of the HRA general reserve is forecast to be £10.9m on 31st March 2026, which is approximately 9.5% of total expenditure and averages circa £500 per property (Based on 21,599 properties on 31st March 2025). Discussion with a HRA Finance peer group indicates this figure is in line with other Councils. However, a review of the risk-based approach to the calculation of the required level of general reserve will be undertaken ahead of the more detailed budget proposals in December 2025. A separate repairs reserve of £1m has been set aside to address the ongoing pressures with demand.

HRA RESERVES	Balance at 31 March 2025	Contribution to reserves	Contribution from reserves	Balance at 31 March 2026
	£'000	£'000	£'000	£'000
Set aside for business risks	(10.9)	-	-	(10.9)
Repairs reserve	(1.0)	-	-	(1.0)
Set aside to meet investment needs	(18.8)	-	13.8	(5,0)
Total	**(30.6)**	**-**	**13.8**	**(16.9)**

2.98.Major Repairs Reserve – Capital works and component replacements to existing properties are forecast to increase over the next five years, as following the review of the capital plan, which aims to improve the decency of properties managed and owned by the Council a backlog of works has been identified, which will be completed on a worst first basis. To maintain this level of annual investment will require borrowing and budgets have been provided for increased financing costs.

2.99 Any surplus revenue income will be used to support the investment into capital expenditure. The strategy to mitigate any identified deficits on the Housing Revenue Account is to identify savings that can be generated from business-as-usual proposals in line with the rest of the Council. Those savings that require more specific service reviews to deliver savings will be considered through appropriate governance processes. All areas of HRA expenditure and income will be considered when finalising the detail of the 2026/27 budget with appropriate consultation:

- Proposed rent increases will be adjusted to reflect any changes in CPI and following the outcome of government consultation for rent convergence and following consultation with Elected Members.
- Service charges will be reviewed with an option to increase these above the CPI+1% to get closer to full cost recovery. This relates to tenants that benefit from communal services.
- The annual investment programme as part of the overall capital plan has been reviewed and is being finalised with options to be presented to invest further in stock condition and realign the programme. Should additional funding become available, following the outcome of the rent convergence consultation, then this could be used to reduce the HRA revenue contributions or reduce the borrowing requirement.
- A review of staffing levels and approved structures will be considered.
- All expenditure lines, including repairs, will be reviewed to ensure resources are directed into priority areas of the budget, especially considering the requirements of Awaab's Law and the regulators consumer standards.

- A review of HRA earmarked reserves will be completed as a mechanism to help smooth out specific one-off pressures to be managed later.

3. Implications for the Council

3.1 Council Plan
N/A.

3.2 Financial Implications
The financial implications for the Council are as set out in the report.

The report identifies a significant funding gap in 2026/27 (and over the medium term) that the Council must address. Given it is not prudent to use reserves to help meet the funding gap, the Council must identify ways of reducing its net expenditure either through less spending, more income or a combination of the two to comply with its statutory obligation of setting a robust balanced budget

3.3 Legal Implications

The Council is under a statutory obligation (s31A of the Local Government Finance Act 1992) to set a balanced budget on an annual basis. Considering the financial challenge described in this report, a proposed MTFS is set out which, if implemented, provides a framework for the Council to comply with its statutory obligation in this respect.

The Service Director Finance is required under s25 of the Local Government Act 2003 to provide the Council with a report on the robustness of estimates and adequacy of reserves when considering the Council's budget for the forthcoming financial year. As is normally the case, that report will be provided alongside the main report on the Budget for 2026/27 as part of the Budget/Council Tax setting for 2026/27.

Once the budget is agreed, s28 of the Local Government Act 2003 requires the Council to monitor its income and expenditure against the agreed budget. This legislation supports the requirement for the Council to monitor performance against budget during the year.

Section 65 Local Government Finance Act 1992 and regulations thereunder require the council to consult non-domestic ratepayers; and the Council's Budget and Policy Framework set out in part 4.3 of the Constitution further requirements about consultation with service users, residents and stakeholders on the budget proposals.

3.4 Climate Change & Air Quality
N/A

3.5 Other (eg Risk, Integrated Impact Assessment or Human Resources)

The development of the MTFS is set against a backcloth of a range of strategic, tactical and operational risks faced by the Council. The Council has in place good arrangements for both identifying and mitigating those risks. Details of the Council's Strategic Risk Register are reported to Cabinet on an ongoing quarterly basis.

Further work is required to develop and implement proposals that will allow the Council to bring its net expenditure in line with its income. There may be legal and staffing implications arising out of these proposals that will, as required, be

considered as part of the development and implementation of those proposals.

Where it is considered necessary to do within the bounds of the Council's Constitution, details of these legal implications will be shared with Cabinet as required. In particular, the Council has an obligation under s149 of the Equalities Act 2010 to comply with the Public Sector Equality Duty when developing budget proposals. To this end, Integrated Impact Assessments will be produced as required to ensure decision makers have due regard to the Council's equality duty.

4. Consultation

This report has been prepared by the Service Director - Finance, in consultation with the Executive Leadership Team.

5. Engagement

The Council's overall financial planning framework includes consideration of wider engagement, consultation and timetabling on residents and other stakeholder views on high level priorities in resource allocation, including consultation with representatives of non-domestic ratepayers.

In addition, there may be a requirement for more detailed service consultations, led by the relevant services, on specific service budget proposals. These will engage service users as early as possible and target the groups most likely to be affected

It is good practice for Councils to consult on proposals that may affect the delivery of services including those related to budget savings and/or income generation. Indeed, the Value for Money Assessment undertaken by the External Auditors specifically questions whether the Council has asked '*Are stakeholders consulted during the development of savings plans? Depending on the nature of the savings plans, stakeholders could include staff, local residents, service users, the voluntary sector and local businesses'*.

Further to that, the Budget and Policy Framework at Section 3 of the Council's Constitution does provide for the Cabinet to set out its arrangements for consultation of budget proposals and that at the end of any such consultation, the Cabinet will draw up proposals having regard to consultation responses.

In compliance with this requirement, and subject to budget proposals coming forward, it is proposed that, as in previous years, some form of public consultation on the budget proposals should take place later in 2025 with a view to informing decisions on the Council's budget for 2026/27. The form and content of such a consultation will be determined in due course.

6. Options

6.1 Options Considered

N/A

6.2 Reasons for Recommended Option

N/A

7. Next Steps and timelines

7.1 Subject to the Cabinet agreeing the MTFS as set out above, work will be undertaken on the identification and development of draft budget proposals and options (with supporting documentation) within the framework set out. Budget Planning Totals for Directorates will be developed to facilitate this work.

7.2 Where existing delegations set out in the Council's Constitution allow, and in consultation with relevant Cabinet Members as appropriate, early action will be taken to implement proposals to reduce the funding gap identified in this report. Where this is not possible, proposals will be developed in consultation with relevant Cabinet Members and will be brought forward for consideration by Cabinet and, where it is necessary to do so, ultimately by Council as set out in the Constitution.

7.3 The culmination of this work on the development of proposals will be that Cabinet will bring forward its initial budget proposals in December 2025 for consideration. The final budget report for 2026/27 will be presented at Budget Council in February 2026.

8. Contact Officer and Relevant Papers

Kevin Mulvaney	Service Director – Finance
James Anderson	Head of Accountancy
Sarah Hill	Finance Manager

9. Background Papers and History of Decisions

Annual Financial Outturn Report and Rollover Report 2024/25 (Item 8)
Annual Budget Report 2025/26 and future years (Item 7)
Quarter 1 Budget Monitoring Report 2025/26

10. Appendices

Appendix A – Updated Medium Term Financial Plan 2026/31
Appendix B – Balances and Reserves 2026/31
Appendix C – Best/West Case Scenario Analysis
Appendix D – Capital Programme to 2032/33
Appendix E – Capital Scoring Matrix
Appendix F – Minimum Working Balance

11. Service Director Responsible

Kevin Mulvaney Service Director – Finance

GENERAL FUND SUMMARY 2026/27 TO 2030/31

APPENDIX A

5 YEAR INDICATIVE BUDGETS	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	2029/30 £000	2030/31 £000
CHILDREN	87,513	95,714	97,993	100,272	102,551	104,830
ADULTS	111,211	177,326	193,577	210,220	225,264	240,308
PLACE	56,841	59,827	60,556	61,723	62,323	62,923
CORPORATE	60,115	60,850	61,336	61,932	62,082	61,982
CENTRAL	71,610	85,972	103,757	117,282	129,513	141,661
TOTAL NET BUDGET	387,290	479,689	517,219	551,429	581,733	611,704

ASSUMED FUNDING	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	2029/30 £000	2030/31 £000
COUNCIL TAX	(252,901)	(265,521)	(280,722)	(296,793)	(313,783)	(331,747)
RETAINED BUSINESS RATES	(64,115)	(64,958)	(65,666)	(66,433)	(67,193)	(67,945)
GOVERNMENT FUNDING	(82,382)	(145,462)	(150,574)	(155,807)	(160,199)	(164,682)
COLLECTION FUND	3,789	3,184	3,183	-	-	-
TOTAL FUNDING	(395,609)	(472,757)	(493,779)	(519,033)	(541,175)	(564,374)

RESERVES AND GAP	2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	2029/30 £000	2030/31 £000
NET CONTRIBUTION TO VRP RESERVE	4,819	7,426	8,545	9,064	8,376	5,449
CONTRIBUTION TO GENERAL RESERVE	1,000	1,000	1,000	1,000	1,000	1,000
CONTRIBUTION TO TRANSF'M RESERVE	2,500	2,500	2,500	2,500	2,500	2,500
BUDGET GAP	**-**	**17,858**	**35,485**	**44,960**	**52,434**	**56,279**

GENERAL FUND SUMMARY 2026/27

APPENDIX A

	2025-26 NET CONTROLL-ABLE BUDGET	FUNDING REFORM GRANT REALIGN-MENT	ADD BACK SAVINGS FALL OUT	RE-BASED 2025-26 CONTROLL-ABLE BUDGET	DEMAND PRESSURE	INFLATION / PAY PRESSURE	OTHER PRESSURE – EXPEND-ITURE	OTHER PRESSURE - INCOME	FUNDING FALL-OUT	FUNDING INCREASE	SAVINGS	2026-27 BUDGET PROPOSAL
	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
***DIRECTORATE BUDGETS*:**												
Children	87,513	3,000	109	90,622	3,494	1,550	-	-	500	(3)	(449)	95,714
Adults	111,211	52,411	-	163,622	7,892	7,640	-	600	-	-	(2,428)	177,326
Place	56,841	925	-	57,766	2,000	-	*(221)	795	167	-	(680)	59,827
Corporate	60,115	-	-	60,115	300	300	440	300	145	-	(750)	60,850
Central	71,610	-	-	71,610	-	8,690	5,672	-	-	-	-	85,972
TOTAL NET BUDGET	**387,290**	**56,336**	**109**	**443,735**	**13,686**	**18,180**	**5,891**	**1,695**	**812**	**(3)**	**(4,307)**	**479,689**
FUNDED BY:												
Council Tax	(252,901)											(265,521)
Retained Business Rates	(64,115)											(64,958)
Government Funding	(82,382)											(145,462)
Collection Fund Transfer	3,789											3,184
TOTAL FUNDING	**(395,609)**											**(472,757)**
TRANSFERS TO/(FROM) RESERVES:												
VRP** - Contribution	10,804											10,668
VRP** - Drawdown	(5,985)											(3,242)
Transformation Reserve	2,500											2,500
General Reserves	1,000											1,000
TOTAL RESERVES	**8,319**											**10,926**
BUDGET DEFICIT	**0**											**17,858**

** Negative figure due to net fall-out of prior year pressures **VRP = Voluntary Revenue Provision*

GENERAL FUND SUMMARY 2027/28

APPENDIX A

	2026-27 NET CONTROLL-ABLE BUDGET	ADD BACK SAVINGS FALL OUT	RE-BASED 2026-27 CONTROLL-ABLE BUDGET	DEMAND PRESSURE	INFLATION / PAY PRESSURE	OTHER PRESSURE – EXPEND-ITURE	OTHER PRESSURE - INCOME	FUNDING FALL-OUT	FUNDING INCREASE	SAVINGS	2027-28 BUDGET PROPOSAL
	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
***DIRECTORATE BUDGETS*:**											
Children	95,714	-	95,714	1,044	1,235	-	-	-	-	-	97,993
Adults	177,326	-	177,326	9,643	6,008	-	600	-	-	-	193,577
Place	59,827	-	59,827	600	-	1,100	70	400	(1,400)	(41)	60,556
Corporate	60,850	-	60,850	-	100	401	450	-	-	(465)	61,336
Central	85,972	19	85,991	-	8,410	9,356	-	-	-	-	103,757
TOTAL NET BUDGET	**479,689**	**19**	**479,708**	**11,287**	**15,753**	**10,857**	**1,120**	**400**	**(1,400)**	**(506)**	**517,219**
FUNDED BY:											
Council Tax	(265,521)										(280,722)
Retained Business Rates	(64,958)										(65,666)
Government Funding	(145,462)										(150,574)
Collection Fund Transfer	3,184										3,183
TOTAL FUNDING	**(472,757)**										**(493,779)**
TRANSFERS TO/(FROM) RESERVES:											
VRP** - Contribution	10,668										10,166
VRP** - Drawdown	(3,242)										(1,621)
Transformation Reserve	2,500										2,500
General Reserves	1,000										1,000
TOTAL RESERVES	**10,926**										**12,045**
BUDGET DEFICIT	**17,858**										**35,485**

GENERAL FUND SUMMARY 2028/29

APPENDIX A

	2027-28 NET CONTROLL-ABLE BUDGET	ADD BACK SAVINGS FALL OUT	RE-BASED 2027-28 CONTROLL-ABLE BUDGET	DEMAND PRESSURE	INFLATION / PAY PRESSURE	OTHER PRESSURE – EXPEND-ITURE	OTHER PRESSURE - INCOME	FUNDING FALL-OUT	FUNDING INCREASE	SAVINGS	2028-29 BUDGET PROPOSAL
	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
***DIRECTORATE BUDGETS*:**											
Children	97,993	-	97,993	1,044	1,235	-	-	-	-	-	100,272
Adults	193,577	-	193,577	9,778	6,265	-	600	-	-	-	210,220
Place	60,556	-	60,556	600	-	10,247	-	300	(9,980)	-	61,723
Corporate	61,336	250	61,586	-	100	241	300	-	-	(295)	61,932
Central	103,757	-	103,757	-	7,760	3,965	-	1,800	-	-	117,282
TOTAL NET BUDGET	**517,219**	**250**	**517,469**	**11,422**	**15,360**	**14,453**	**900**	**2,100**	**(9,980)**	**(295)**	**551,429**
FUNDED BY:											
Council Tax	(280,722)										(296,793)
Retained Business Rates	(65,666)										(66,433)
Government Funding	(150,574)										(155,807)
Collection Fund Transfer	3,183										-
TOTAL FUNDING	**(493,779)**										**(519,033)**
TRANSFERS TO/(FROM) RESERVES:											
VRP** - Contribution	10,166										9,064
VRP** - Drawdown	(1,621)										-
Transformation Reserve	2,500										2,500
General Reserves	1,000										1,000
TOTAL RESERVES	**12,045**										**12,564**
BUDGET DEFICIT	**35,485**										**44,960**

GENERAL FUND SUMMARY 2029/30

APPENDIX A

	2028-29 NET CONTROLL-ABLE BUDGET	ADD BACK SAVINGS FALL OUT	RE-BASED 2028-29 CONTROLL-ABLE BUDGET	DEMAND PRESSURE	INFLATION / PAY PRESSURE	OTHER PRESSURE – EXPEND-ITURE	OTHER PRESSURE - INCOME	FUNDING FALL-OUT	FUNDING INCREASE	SAVINGS	2029-30 BUDGET PROPOSAL
	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
***DIRECTORATE BUDGETS*:**											
Children	100,272	-	100,272	1,044	1,235	-	-	-	-	-	102,551
Adults	210,220	-	210,220	8,473	6,571	-	-	-	-	-	225,264
Place	61,723	-	61,723	600	-	-	-	-	-	-	62,323
Corporate	61,932	250	62,182	-	100	-	-	-	-	(200)	62,082
Central	117,282	-	117,282	-	8,930	3,301	-	-	-	-	129,513
TOTAL NET BUDGET	**551,429**	**250**	**551,679**	**10,117**	**16,836**	**3,301**	**-**	**-**	**-**	**(200)**	**581,733**
FUNDED BY:											
Council Tax	(296,793)										(313,783)
Retained Business Rates	(66,433)										(67,193)
Government Funding	(155,807)										(160,199)
Collection Fund Transfer	-										-
TOTAL FUNDING	**(519,033)**										**(541,175)**
TRANSFERS TO/(FROM) RESERVES:											
VRP** - Contribution	9,064										8,376
VRP** - Drawdown	-										-
Transformation Reserve	2,500										2,500
General Reserves	1,000										1,000
TOTAL RESERVES	**12,564**										**11,876**
BUDGET DEFICIT	**44,960**										**52,434**

GENERAL FUND SUMMARY 2030/31

APPENDIX A

	2029-30 NET CONTROLL-ABLE BUDGET	ADD BACK SAVINGS FALL OUT	RE-BASED 2029-30 CONTROLL-ABLE BUDGET	DEMAND PRESSURE	INFLATION / PAY PRESSURE	OTHER PRESSURE – EXPEND-ITURE	OTHER PRESSURE - INCOME	FUNDING FALL-OUT	FUNDING INCREASE	SAVINGS	2030-31 BUDGET PROPOSAL
	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
***DIRECTORATE BUDGETS*:**											
Children	102,551	-	102,551	1,044	1,235	-	-	-	-	-	104,830
Adults	225,264	-	225,264	8,473	6,571	-	-	-	-	-	240,308
Place	62,323	-	62,323	600	-	-	-	-	-	-	62,923
Corporate	62,082	-	62,082	-	100	-	-	-	-	(200)	61,982
Central	129,513	-	129,513	-	9,130	3,018	-	-	-	-	141,661
TOTAL NET BUDGET	**581,733**	**-**	**581,733**	**10,117**	**17,036**	**3,018**	**-**	**-**	**-**	**(200)**	**611,704**
FUNDED BY:											
Council Tax	(313,783)										(331,747)
Retained Business Rates	(67,193)										(67,945)
Government Funding	(160,199)										(164,682)
Collection Fund Transfer	-										-
TOTAL FUNDING	**(541,175)**										**(564,374)**
TRANSFERS TO/(FROM) RESERVES:											
VRP** - Contribution	8,376										5,449
VRP** - Drawdown	-										-
Transformation Reserve	2,500										2,500
General Reserves	1,000										1,000
TOTAL RESERVES	**11,876**										**8,949**
BUDGET DEFICIT	**52,434**										**56,279**

GENERAL FUND RESERVES

APPENDIX B

	Reserves position 31st March 2025	Budget report Approved Movements	Revised reserves position 1st April 2025	Estimated Movements In-Year	Estimated Reserves position 31st March 2026	Estimated Reserves position 31st March 2027	Estimated Reserves position 31st March 2028	Estimated Reserves position 31st March 2029	Estimated Reserves position 31st March 2030	Estimated Reserves position 31st March 2031
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Statutory (School Reserves)										
Schools Balances	(11,119)	-	(11,119)	-	(11,119)	(11,119)	(11,119)	(11,119)	(11,119)	(11,119)
Public Health	(896)	-	(896)	448	(448)	-	-	-	-	-
Total Statutory (School Reserves)	***(12,015)***	***-***	***(12,015)***	***448***	***(11,567)***	***(11,119)***	***(11,119)***	***(11,119)***	***(11,119)***	***(11,119)***
Earmarked										
Ward Based Activity	(577)	-	(577)	289	(288)	-	-	-	-	-
Place Standard	(402)	-	(402)	201	(201)	-	-	-	-	-
Sub Total (member led)	***(979)***	***-***	***(979)***	***490***	***(489)***	***-***	***-***	***-***	***-***	***-***
Transformation	(1,480)	(2,500)	(3,980)	2,500	(1,480)	(1,480)	(1,480)	(1,480)	(1,480)	(1,480)
Development Funding	(914)	-	(914)	457	(457)	-	-	-	-	-
Revenue Grants	(17,998)	-	(17,998)	3,000	(14,998)	(11,998)	(8,998)	(5,998)	(2,998)	-
Stronger Families	(688)	-	(688)	500	(188)	-	-	-	-	-
Other	(3,942)	-	(3,942)	1,139	(2,804)	(1,665)	(1,365)	(1,065)	(765)	(465)
Voluntary Revenue Provision	(6,504)	(4,819)	(11,323)		(11,323)	(18,749)	(27,294)	(36,358)	(44,734)	(50,183)
Strategic Budget Contingency	(3,500)	-	(3,500)	3,500	-	-	-	-	-	-
Earmarked reserves sub-total	***(36,005)***	***(7,319)***	***(43,324)***	***11,586***	***(31,739)***	***(33,892)***	***(39,137)***	***(44,901)***	***(49,977)***	***(52,128)***
General Balances	***(25,046)***	***(1,000)***	***(26,046)***	***-***	***(26,046)***	***(27,046)***	***(28,046)***	***(29,046)***	***(30,046)***	***(31,046)***
Total usable reserves	***(61,051)***	***(8,319)***	***(69,370)***	***11,586***	***(57,785)***	***(60,938)***	***(67,183)***	***(73,947)***	***(80,023)***	***(83,174)***
Grand Total All Reserves	***(73,066)***	***(8,319)***	***(81,385)***	***12,034***	***(69,352)***	***(72,057)***	***(78,302)***	***(85,066)***	***(91,142)***	***(94,293)***

Glossary of Reserves

RESERVE	DESCRIPTION
School Balances	Statutory reserves relating to both individual schools' balances/deficits carried forwards.
Public Health	Timing issues on Public Health grant spend commitments (Public health grant is statutorily ring-fenced)
Ward Based Activity	Set aside reflecting timing issues on ward-based activity spend commitments
Place Standard	Set aside to support the resourcing of emerging Place Standard action plans.
Transformation	Set aside for strategic transformation developments over the next 12 to 24 months.
Development Funding	To address the scale of development costs required to support targeted development and the upscaling of capital investment activity and major project activity over the MTFP.
Revenue Grants	Represents grants and contributions recognised in the Comprehensive Income and Expenditure Statement before expenditure has been incurred.
Stronger Families	Set aside reflecting timing issues on expenditure commitments supporting a range of Stronger Families activity, funded from external grant.
Other	A range of smaller reserves earmarked for specific purposes.
Voluntary Revenue Provision	To fund voluntary overpayments of Minimum Revenue Provision (MRP).
Strategic Budget Contingency	To fund budget pressures that may arise due to delays in implementing savings plans and/or issues that have arisen post the agreement of the budget.
Unallocated Reserves	General reserve to support Council working capital and cashflow requirements, and unbudgeted/financial resilience risks highlighted in the Council's corporate risk register.

BEST CASE SCENARIO	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	2030/31 £m
BASELINE BUDGET GAP	**17.9**	**35.5**	**45.0**	**52.5**	**56.3**
FUNDING					
Government Funding Increase – maximum modelled uplift (no scaling down)	(4.5)	(8.0)	(11.5)	(11.5)	(11.5)
TOTAL FUNDING	**(4.5)**	**(8.0)**	**(11.5)**	**(11.5)**	**(11.5)**
SPEND					
Adult Social Care demand pressures – 5% lower than baseline assumptions	(0.5)	(1.0)	(1.5)	(2.0)	(2.5)
Looked after Children demand pressures – 5% lower than baseline assumptions	(0.3)	(0.5)	(0.5)	(0.5)	(0.5)
TOTAL SPEND	**(0.8)**	**(1.5)**	**(2.0)**	**(2.5)**	**(3.0)**
TOTAL CHANGES FROM BASELINE	**(5.3)**	**(9.5)**	**(13.5)**	**(14.0)**	**(14.5)**
BEST CASE SCENARIO - BUDGET GAP	**12.6**	**26.0**	**31.5**	**38.5**	**41.8**

WORST CASE SCENARIO	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	2030/31 £m
BASELINE BUDGET GAP	**17.9**	**35.5**	**45.0**	**52.5**	**56.3**
FUNDING					
Government Funding Increase –baseline assumptions halved	3.4	6.0	8.6	8.6	8.6
Food Waste Collection Funding from Government not received	-	-	5.8	5.8	5.8
TOTAL FUNDING	**3.4**	**6.0**	**14.4**	**14.4**	**14.4**
SPEND					
Pay Uplift 2026/27 onwards: Increased to 4%; compared to 3.5% baseline level	1.2	2.4	3.6	4.8	6.0
Adult Social Care demand pressures – 5% higher than baseline assumptions	0.5	1.0	1.5	2.0	2.5
Looked after Children demand pressures – 5% higher than baseline assumptions	0.3	0.5	0.5	0.5	0.5
TOTAL SPEND	**2.0**	**3.9**	**5.6**	**7.3**	**9.0**
TOTAL CHANGES FROM BASELINE	**5.4**	**9.9**	**20.0**	**21.7**	**23.4**
WORST CASE SCENARIO - BUDGET GAP	**23.3**	**45.4**	**65.0**	**74.2**	**79.7**

Capital Plan Expenditure Summary

Capital Plan Expenditure Summary	2025/26 £'000	MTFS UPDATE 2026/27 £'000	2027/28 £'000	2028/29 £'000	2029/30 £'000	2030/31-2032/33 £'000	Total £'000
General Fund:							
Children & Families							
Learning & Early Support	25,177	28,911	20,989	3,827	2,750	0	**81,654**
Resources, Improvement & Partnership	550	662	621	0	0	0	**1,833**
	25,727	**29,573**	**21,610**	**3,827**	**2,750**	**0**	**83,487**
Adults & Health							
Communities & Access Services	413	3,047	283	0	0	0	**3,743**
Learning Disabilities & Mental Health	3,575	5,377	2,748	0	0	0	**11,700**
Adults Social Care Operation	235	0	0	0	0	0	**235**
	4,223	**8,424**	**3,031**	**0**	**0**	**0**	**15,678**
Place							
Skills & Regeneration	52,264	64,605	31,616	27,883	32,176	4,021	**212,565**
Development	108,220	111,243	66,031	30,494	37,470	32,554	**386,012**
Highways and Streetscene	36,608	36,155	20,316	19,530	26,243	9,681	**148,533**
Environment, Strategy & Climate Change	1,516	11,577	3,829	0	2,050	0	**18,972**
	198,608	**223,580**	**121,792**	**77,907**	**97,939**	**46,256**	**766,082**

Capital Plan Expenditure Summary

		MTFS UPDATE					
Capital Plan Expenditure Summary	**2025/26 £'000**	**2026/27 £'000**	**2027/28 £'000**	**2028/29 £'000**	**2029/30 £'000**	**2030/31-2032/33 £'000**	**Total £'000**
General Fund:							
Public Health & Corporate Resources							
Strategy & innovation	9,736	11,306	11,246	11,116	10,676	8224	**62,304**
Culture & Visitor Economy	909	375	665	453	200	0	**2,602**
	10,645	**11,681**	**11,911**	**11,569**	**10,876**	**8,224**	**64,906**
General Fund Capital Plan	**239,203**	**273,258**	**158,344**	**93,303**	**111,565**	**54,480**	**930,153**
Housing Revenue Account:							
Strategic Priorities	7,909	14,779	26,900	32,178	17,634	18,525	**117,925**
Baseline	36,775	46,780	46,344	47,119	46,180	48,227	**271,425**
HRA Capital Plan	**44,684**	**61,559**	**73,244**	**79,297**	**63,814**	**66,752**	**389,350**
TOTAL EXPENDITURE	**283,887**	**334,817**	**231,588**	**172,600**	**175,379**	**121,232**	**1,319,503**

Capital Plan Funding Summary

Appendix D

General Fund Funding Summary	2025/26 £'000	MTFS UPDATE 2026/27 £'000	2027/28 £'000	2028/29 £'000	2029/30 £'000	2030/31-2032/33 £'000	Total £'000
Capital Grants/Contributions	122,866	113,513	66,704	45,182	49,410	4,021	**401,696**
Earmarked Capital Receipts	8,899	10,969	390	3,390	3,390	0	**27,038**
Service Funded Prudential Borrowing	16,383	30,626	17,187	10,000	12,050	8,000	**94,246**
Non-Earmarked Capital Receipts	1,272	1,080	1,176	756	756	0	**5,040**
Corporate Prudential Borrowing	89,783	117,070	72,887	33,975	45,959	42,459	**402,133**
GENERAL FUND FUNDING	**239,203**	**273,258**	**158,344**	**93,303**	**111,565**	**54,480**	**930,153**

Housing Revenue Account Funding Summary	2025/26 £'000	MTFS UPDATE 2026/27 £'000	2027/28 £'000	2028/29 £'000	2029/30 £'000	2030/31-2032/33 £'000	Total £'000
Capital Grants/Contributions	1,998	3,169	6,226	8,507	3,981	5,193	**29,074**
Earmarked Capital Receipts	2,074	1,749	9,592	14,071	2,150	3,040	**32,676**
Flexible Capital Receipts	3,922	3,330	3,626	2,331	2,331	2,331	**17,871**
Reserves / Revenue Contributions	12,701	2,822	2,546	2,347	2,500	2,500	**25,416**
Reserves - MRR	23,989	25,489	26,254	27,041	27,852	28,688	**159,313**
Corporate Prudential Borrowing	0	25,000	25,000	25,000	25,000	25,000	**125,000**
HRA FUNDING	**44,684**	**61,559**	**73,244**	**79,297**	**63,814**	**66,752**	**389,350**

APPENDIX E

Prioritisation Matrix for Capital Schemes

CRITERIA	Scoring Method		Weighting
Statutory / Legal / Health & Safety Duties		**Does the project contribute to fulfilling a genuine statutory function? Is there a legislative requirement which underlies the project? Is there a Health & Safety need?**	
	10	Project has a specific immediate statutory or legal requirement and/or has immediate health and safety need	30%
	5	Services based on statutory/health and safety duties, but there is some degree of discretion about how the function is carried out	
	0	Services where the Council can exercise complete discretion, with no indication of status	
Council Plan Priorities		**How does this project fit within the priorities of the Council as set out in the Corporate Plan?**	
	10	Meets all Council Priorities	15%
	7	Meets 2 or 3 Council Priorities	
	3	Meets 1 Council Priority	
	0	Does not meet any Council Priorities	
Funding		**Is a substantial proportion of the cost covered by external funding, or does the Council need to fund the scheme from its own resources.**	
	10	Above 75% externally funded. Will generate a specifically identified capital receipt in excess of amount borrowed.	20%
	7	Above 25% and up to 75% external funded identified	
	3	0-25% external funding identified. Will generate a specifically identified capital receipt less than amount borrowed.	
	0	0-25% external funding identified. No identified capital receipts	
Service Impact		**Where failure to provide a project will have a significant adverse impact on service delivery or managing demand for services. If the scheme is not pursued or is delayed, is there likely to be a failure of a Council service? Reputational Risk**	
	10	Very High Risk – high level of impact. Essential to Council's Core business – can't function without it	15%
	5	Medium Risk. Loss of efficiencies/revenue or increased costs	
	0	No Risk. Doesn't affect Council's core business or infrastructure	
Revenue Implications		**What are the ongoing revenue costs associated with the development. Are the future costs sustainable? Does the scheme produce any long-term savings for the Council e.g. reduced repairs and maintenance/energy costs?**	
	10	Invest to Save scheme, delivering clear demonstrable income or revenue savings above capital charges and funding of future revenue costs identified	20%
	8	Capital charges equally offset by service savings	
	5	Some additional savings but capital charges are greater than operating costs	
	3	Capital costs are not covered but no additional operating costs identified	
	0	There are no revenue savings and no revenue funding identified, incurring both increased borrowing and operating costs	

Appendix F

Assessment of the level of the Council's General Fund Working Balance

1. Reserves are sums set aside to meet possible future costs where there is no certainty about whether or not the costs will actually be incurred. The requirement for financial reserves is acknowledged in statute. Sections 32 and 43 of the Local Government Finance Act 1992 require billing and precepting authorities in England and Wales to have regard to the level of reserves needed for meeting estimated future expenditure when calculating the budget requirement.

2. When reviewing their medium term financial plans and preparing their annual budgets local authorities should consider the establishment and maintenance of reserves. These can be held for three main purposes:

   - a working balance to help cushion the impact of uneven cash flows and avoid unnecessary temporary borrowing – this forms part of general reserves;

   - a contingency to cushion the impact of unexpected events or emergencies – this also forms part of general reserves;

   - a means of building up funds, often referred to as earmarked reserves, to meet known or predicted requirements; earmarked reserves are accounted for separately but legally remain part of the General Fund.

3. Local authorities also hold other reserves that arise out of the interaction of legislation and proper accounting practice. These are reserves, which are not resource-backed and cannot be used for any other purpose. An example is the Revaluation Reserve which is a reserve that records unrealised gains in the value of fixed assets. The reserve increases when assets are revalued upwards, and decreases as assets are depreciated or when assets are revalued downwards or disposed of. Reserves of this type do not form part of the annual review of the adequacy of reserves.

4. Section 25(1)(b) of the Local Government Act 2003 requires the Director of Finance to report to the Council on the adequacy of the proposed financial reserves. Guidance is published by the Chartered Institute of Public Finance and Accountancy (CIPFA) on the establishment and maintenance of local authority reserves and balances. The level and utilisation of reserves will be determined formally by the Council, informed by the advice and judgement of the Director of Finance.

5. In support of this requirement, and as part of the development of the budget for 2026/27, a risk assessment has been carried out to establish the minimum level of the General Fund Working Balance for Kirklees. Details of this assessment are provided below in **Table 1** which indicates that the minimum working balance should be **c£22.0m**. The balance, as per the approved budget, as at March 2026 is forecast at £26.0m

Table 1: Risk Assessment for General Fund Working Balance – 2026/27

Minimum £000	Desirable £000	Area of expenditure / Explanation of risk / Justification for Reserves
1,200	**2,500**	**Pay** – the opening MTFS included annual provision for a 3% pay award for 25/26 (recently settled at 3.2%) and 3.5% thereafter. As future pay awards within the MTFS period are not yet agreed, there is a risk of the current assumptions on pay being at variance to the MTFS assumptions. An increase of 1% in the annual pay award would result in an increased cost of c£2.5m. **Assessment: Degree of risk / reserve needed:** **Low £0-2.5m Medium £2.5m High £5m** **Likelihood of risk occurring: Medium** **Minimum reserve needed: £1.2m**
1,000	**1,500**	**Prices** – the budget assumes that, in the main, price inflation can be managed by Departments within a zero cash-limited increase or specific inflation allowances for designated expenditure (e.g. National Living Wage, IT software, Utilities and other known contractual uplifts). Inflation is currently expected to peak at 4% in late 2025 before falling back to the Bank of England target level of 2% in 2027. This should reduce the impact of the inflation within the sector. Inflation contingency in central budgets only covers the waste contract and energy inflation. **Assessment: Degree of risk / reserve needed:** **Low £0.5m Medium £1.0m High £1.5m** **Likelihood of risk occurring: Medium** **Minimum reserve needed: £1.0m**
500	**500**	**Litigation Claims** – as the Council faces reductions in resources for future provision of services, there is an increased risk of litigation beyond that which would otherwise be covered by insurance arrangements. **Assessment: Degree of risk / reserve needed:** **Low £0.5m Medium £1.0m High £2.0m** **Likelihood of risk occurring: Low** **Minimum reserve needed: £0.5m**
2,000	**3,000**	**Income from Fees and Charges** – With continuing impact of the cost of living pressures combined with a relatively benign outlook for economic growth, the Council's income streams may continue to be impacted. Whilst some budgets have been reduced to reflect more realistic income levels, it is the case that a number of services are also price sensitive and delivered in competition with other providers (e.g. trade waste / building control / parking / attractions). **Assessment: Degree of risk / reserve needed:** **Low £1m Medium £2.0m High £3.0m** **Likelihood of risk occurring: Medium** **Minimum reserve needed: £2.0m**

Minimum £000	Desirable £000	Area of expenditure / Explanation of risk / Justification for Reserves
3,000	**7,000**	**Demand Led Pressures on Services** – the most significant is likely to be the ongoing impact of demand for Council services, particularly in the social care sector, but more recently seen in Home to School transport and the provision of temporary accommodation. Both Adult and Children's Social Care can be subject to significant demand-led pressures. This can vary from one year to the next and both have been significantly impacted by the continuing backlog of pressures in the Health Service. Home to School Transport is also subject to significant demand-led pressures, especially over recent years. The Council is awaiting a Government White Paper on SEND which may impact demand. Both Housing and Council Tax Support may also come under pressure given the prevailing economy. The Council spends c£60m on Housing Benefits whereas the cost of Council Tax Support (applied as a discount on council tax bills) is estimated at c£36m. Qualifying expenditure on Housing Benefit is *generally* matched by Government subsidy in full, however, increases in, supported accommodation services (referred to below) or temporary accommodation at a lower rate of recovery, can increase the overall net cost to the Council. In recent years, the Council has experienced an increase in Supported Accommodation enquiries and applications. The rate of subsidy for this category of accommodation is 60% and not 100% if the landlord is not a Registered Provider. There has also been a very large increase over recent years in both the volume and cost for Temporary Accommodation. Notwithstanding, an estimate is provided in the budget, if this trend continues this additional provision will not be sufficient to cover the Council's financial risk exposure. **Assessment: Degree of risk / reserve needed:** **Low £1.0m Medium £3.0m High £7.0m** **Likelihood of risk occurring: Medium** **Minimum reserve needed: £3.0m**
500	**500**	**Grant income** – there is a risk that the MTFS is built on optimistic assumptions of income that may prove unsustainable over the life of the plan. **Assessment: Degree of risk / reserve needed:** **Low £0.5m Medium £1.0m High £2.0m** **Likelihood of risk occurring: Low** **Minimum reserve needed: £0.5m**

Appendix F

Minimum £000	Desirable £000	Area of expenditure / Explanation of risk / Justification for Reserves
3,000	**4,000**	**Non-achievement of Savings** – the scale of savings required by the Council to achieve a balanced budget in 2026/27 (and across the rest of the MTFS period) is such that it will require a fundamental shift in how the Council operates which may not be possible in the time available. Whilst arrangements are in place to manage the implementation of the savings it is recommended that additional cover be provided to mitigate the risk of some not being realised or implementation lead in times being longer. This recognises the amount of savings achieved since 2010 and the fact that decisions on budget savings may become increasingly difficult. It should be noted that this MTFS does not contain any future years where the core funding level of the Council is known yet, so increasing the degree of uncertainty within the budget assumptions made on high value budgets. **Assessment: Degree of risk / reserve needed:** **Low £2.0m Medium £3.0m High £4.0m** **Likelihood of risk occurring: Medium** **Minimum reserve needed: £3.0m**
500	**500**	**Unforeseen / emergency expenditure** – there is a risk that unexpected events may occur which require expenditure to be incurred or income to be foregone that has not been budgeted. Examples might include, adverse weather, flooding, business continuity linked to loss of key service/building (to the extent not covered by insurance) **Assessment: Degree of risk / reserve needed:** **Low £0.5m Medium £1.0m High £2m** **Likelihood of risk occurring: Low (assuming Bellwin scheme would apply in certain cases)** **Minimum reserve needed: £0.5m**
500	**1,000**	**Unbudgeted borrowing costs** – there is a risk that unbudgeted in-year overspends are funded by a reduction in reserves. This may necessitate the Council having to undertake external borrowing to fund its Capital Plan at a time when interest rates are relatively high (as the Council cannot borrow internally). There is also the risk of unbudgeted overspends on large regeneration projects, which would increase in-year external borrowing. The interest cost of a £20m loan at 5% would be c £1m per annum. **Assessment: Degree of risk / reserve needed:** **Low £500k Medium £1m High £2m** **Likelihood of risk occurring: Low** **Minimum reserve needed: £0.5m**

Minimum £000	Desirable £000	Area of expenditure / Explanation of risk / Justification for Reserves
1,500	1,500	**Delay in repayment or default on loans made by the Council or having to set aside additional sums for the provision for bad debts**– there is a risk on loans made by the Council to third party organisations potentially resulting in the need to write off the loans, or to agree to extend loan repayment period; and there is a risk that the amount provided for bad debt in services (in either the revenue budget or held on the balance sheet is insufficient). **Assessment: Degree of risk / reserve needed:** **Low £500k Medium £1.5m High £2m** **Likelihood of risk occurring: Medium** **Minimum reserve needed: £1.5m**
1,000	1,000	**Changes in fair value of Council long-term investments** – there is a risk that the deterioration in the capital value of the Council's investments (in the CCLA) that, without the statutory override, would otherwise have to be charged to the Council's revenue account. The cost on the initial investment was £10m. The Government has extended the statutory override to 29/30 when it will be removed. **Assessment: Degree of risk / reserve needed:** **Low £0 Medium £1.0m High £1.5m** **Likelihood of risk occurring: Medium** **Minimum reserve needed: £1.0m**
5,000	5,000	**DSG Deficit / Safety Valve Programme** – there is a continued risk that the DSG deficit continues to increase beyond the assumed level in the Safety Valve agreement and that the Government ends the Statutory Override in March 2028 without an adequate solution to SEND in place. Once the statutory override allowing Councils to carry the High Needs Budget deficit on the Balance Sheet (rather than charge it to revenue) expires, the Council will have to fund it. Depending on the scale of the deficit at the time and whether or not Government have provided funding for historic deficits, it could result in the need for an Exceptional Financial Support agreement with MHCLG (the expected year-end deficit balance at 31/3/26 is £76m – with an annual cost of carry c£4m. At £76m the deficit is beyond the Council's Usable Revenue Reserves. **Assessment: Degree of risk / reserve needed:** **Low £0m Medium £5m High £10m** **Likelihood of risk occurring: Medium** **Minimum reserve needed: £5m**
0	0	**Affordability of Capital Plan / Receipt of Capital Resources/ Capital Plan Funding – the overall capital programme assumes a level of income from asset disposals / grants – as the timing of these can sometimes be uncertain it is sometimes considered prudent to set provision aside for additional revenue to help offset any shortfall if expenditure cannot be delayed. The current Capital Strategy reflects substantial levels (over £30m) of receipts required for the General Fund Capital Plan. Further borrowing or revenue contributions could be required in lieu of capital receipts being realised (unless other funding sources can be found or expenditure delayed), with the risk that further borrowing is not prudent, sustainable or affordable as required by the Prudential Code.

Minimum £000	Desirable £000	Area of expenditure / Explanation of risk / Justification for Reserves
		Assessment: Degree of risk / reserve needed: **Low £0k Medium £1.0m High £2.0m** **Likelihood of risk occurring: Low** **Minimum reserve needed: £0k**
0	**0**	**VAT- Partial Exemption** – If the PE limits are breached there is a risk that c£3m could be potentially lost (based on £57m input tax in 2024/25 & a 5% PE limit). Anything above that would depend on the VAT incurred on the project(s) that was the cause of the partial exemption breach. There is the possibility a breach could be managed through HMRC's averaging rules which looks at partial exemption over 7 years (which can be a combination of actual and forecast) – if the average over 7 years is less than 5%, repayment to HMRC is not required. **Assessment: Degree of risk / reserve needed:** **Low £0m Medium £0m High £3m** **Likelihood of risk occurring: Low** **Minimum reserve needed: £0m**
2,500	**2,500**	**Collection Fund –** Business Rates: Given the volatility inherent in the current rates retention system and the regime's imminent overhaul, it is considered prudent to set aside a level of funding within the working balance to help manage the associated risks. Taking into account Collection Fund monitoring to date, the provisions made to cover the risk of appeals and bad debts and an amount held for the volatility in Business Rates, it is proposed to set aside a minimum amount for 2026/27. A 1% reduction in collection equates to c £0.5m for Business Rates. Council Tax: alongside potential shortfalls in new build projections in the Council Tax base there is an increased risk of bad debts as a consequence of the ongoing cost of living crisis. A 1% reduction in collection equates to c £2.5m. **Assessment: Degree of risk / reserve needed:** **Low £1.3m Medium £2.5m High £3.9m** **Likelihood of risk occurring: Medium** **Minimum reserve needed: £2.5m**
22,000	**31,000**	**Total**

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REPORT TITLE: Our Cultural Heart, part of the Huddersfield Blueprint, Phase 2 Gateway 4

Cabinet date	**9th September 2025**
Cabinet Member Portfolio: Finance and Regeneration	**Cllr Graham Turner**
Key Decision **Eligible for Call In**	**Yes** **Yes**

Purpose of Report

This report builds on the approvals and delegations previously given by Cabinet and seeks permission to draw down funding from the Our Cultural Heart budgets as allowed for in the council's capital plan.

Phase 2 (combined museum & art gallery, public realm and basement) is the main focus of this report where work continues on the Gateway 3 to Gateway 4 process, and further approvals and delegations are sought to sign off the conclusion of the Pre Contract Services Agreement (PCSA) and Gateway 4 and then to award the JCT construction contract and start construction works on site.

There is also an update on Phase 1 (library, food hall, public square/public realm, and basement) outlining the contractor's progress on site.

Proposals are also brought forward for the demolition of the remaining retail units in preparation for delivery of the park as the next phase (Phase 3) and this report seeks approvals and delegations to procure and award the retail demolition contract.

There is also an overview of the remaining phases of the master plan with work being funded from the previously approved feasibility budget including the ongoing review of the venue and the feasibility study to develop one of the options for the Queen Street plot as a multi storey car park.

With regard to the Capital Development Budget for project management, design and contractor costs (collectively the Construction Budget) and previous reallocations this report outlines further reallocations from this budget including the outcome of the Budget Council on 5th March 2025.

In addition to the construction activity there is an update on the budgets for the council's operational and support services pre and post-opening costs in preparing for the opening and ongoing operation of the facilities within Our Cultural Heart (OCH). These costs will continue to be reviewed and refined.

Recommendations:

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

2. **Conclusion of Phase 2 Gateway 4 & Enabling Works**
   To agree to delegate authority to the Executive Director of Place, in consultation with the Portfolio Holder for Finance & Regeneration to sign off the conclusion of Phase 2 Gateway 4 including the contractors design proposals, planning and listed building consent matters, the RIBA 4 design, the construction programme, the construction contract and the contract sum and if required to maintain the optimum programme and subject to approval of Recommendation 6 to instruct any necessary enabling works from the Phase 2 Construction Budget during the PCSA period prior to the conclusion of Phase 2 Gateway 4.

3. **Construction Partner, Phase 2, JCT Construction Contract**
   To agree to delegate authority to the Executive Director of Place, in consultation with the Service Director Finance and the Portfolio Holder for Finance & Regeneration to make the decision to award the JCT construction contract and start works on site. If the award would exceed the Phase 2 Construction Budget then the matter will be brought back to Cabinet.

4. **Demolition Partner, Retail Demolition Contract**
   To agree to delegate authority to the Executive Director of Place, in consultation with the Service Director Finance, the Head of Procurement and the Portfolio Holder for Finance & Regeneration to make all necessary preparations to secure vacant possession of the Piazza Shopping Mall including serving notice on the remaining tenants and occupiers and ending all contracts, procure and then award the demolition contract either as part of Phase 2 or as a separate contract and start works on site. If the award would exceed the Retail Demolition Budget then the matter will be brought back to Cabinet.

5. **SDP, Architect and Engineer Services, Extension of Appointments**
   Subject to agreement on fees and in line with the council's procurement process and Contract Procedure Rules to agree to continue the services being provided by the Client construction delivery team (SDP, architect and the engineer) to progress Phase 2 to Gateway 5 and the procurement and completion of the retail demolition. The same delivery team is providing the necessary services on Phase 1 and the rest of the feasibility work on the master plan.

6. **Construction Budget for, Phase 1 Gateway 5, Phase 2 Gateway 5, Retail Demolition & Master Plan Allowances**
   To approve subject to approval of the recommendations above the further draw down of £58.228m thereby increasing the committed funding for the programme from £78.957m to £137.185m.

7. **Reallocation of Budget to Operational Services**
   To approve subject to no other sources of funding being available the reallocation of funding from the Construction Budget to fund the West Yorkshire Archive Service (£265k) archive cleaning pre-opening capital costs as part of Phase 1 and IT costs (£200k) for Phase 2.

8. **Reallocation of Budget for Internal Staff Costs and Property Costs**
   To approve subject to no other sources of funding being available the reallocation of funding from the Construction Budget to fund the council's internal staff costs associated with the construction delivery (£2m) and property costs (£750k) as set out in Section 3.2.

9. **Deliver the Programme to Phase 1 Gateway 5 (end of construction), Phase 2 Gateway 5 (end of construction) , Retail Demolition & Develop the Master Plan**
   Subject to approval on the matters above to agree to delegate authority to the Executive Director of Place to work within approved budgets to deliver the project management, design and construction of the programme to Phase 1 Gateway 5, Phase 2 Gateway 5, retail demolition and develop the master plan.

10. **Complete the Agreement to Lease and the Lease for the Phase 1 Food Hall Tenant**
    To agree to delegate authority to the Executive Director of Place, in consultation with the Service Director Finance and the Portfolio Holder for Finance & Regeneration to conclude the tenant selection process, negotiate the commercial terms and complete the Agreement to Lease and the Lease.

11. **Operational Services Additional Budgets Phase 1 & Phase 2**
    In addition to recommendations in items 7 and 8 above and the requests in sections 2.1.2 and 2.2.2 of this report to agree that the Executive Directors of Place, Deputy Chief executive and Executive director Public Health and Corporate Resources in consultation with the Service Director - Finance to review and monitor the relevant service pre and post opening costs of the various phases of the Our Cultural Heart programme. The Service Director – Finance shall ensure that the requests and estimates are added to the Council's Medium Term Financial Plan and be further refined as updated information becomes available.

12. That authority be delegated to the Service Director – Legal, Governance and Commissioning to negotiate, agree, enter into all agreements and enter into and execute any documents necessary to enable the delivery of the Our Cultural Heart project to proceed.

Reasons for Recommendations:

At the outset of the Our Cultural Heart programme it was determined that at key points in the development delivery process (gateways) the programme would be brought back to Cabinet to consider the recommendations and decide the future direction of each of the phases.

As Phase 2 is now progressing towards Gateway 4 certain decisions are required from Cabinet in terms of agreeing to enter into the next stages of delivery for the design, contractor contract award, securing the ongoing services of the Client construction delivery team and the associated funding to be drawn down.

In parallel with the progress on Phase 2 construction continues on site for Phase 1 where there is a request to replenish the contingency, draw down is also requested to fund the demolition of the remaining retail units and feasibility work continues on the

remaining phases including the review of the venue to reaffirm the operating model within affordability limits and investigating the viability of the Queen St plot for the development of a multi storey car park.

Recommendation 9 is to allow day to day decisions to be made to progress the programme and Recommendation 10 is to allow completion of the letting/lease with the Phase 1 food hall tenant in a timely manner for a Summer 2026 opening.

Whilst there are proposals within this report regarding the service budgets for Phase 1 and Phase 2 it is recognised that some further discussions are needed to conclude the precise figures and Recommendation 11 provides for this.

Resource Implications:

With construction programmes of the scale of Our Cultural Heart a significant resource, outside the normal day-to-day business of the council, is needed and so the council's Client construction delivery team is made up of external consultants with the necessary range of skills. The cost of the delivery team is included in the budgets for each phase.

Previous approvals have secured the funding for this team to deliver Phase 1 to completion, Phase 2 to Gateway 4 and other work on the master plan. This report requests the necessary further draw down of construction funding to progress Phase 2 to the completion of construction, the demolition of the remaining retail units in preparation for construction of the park, and the continuing work on the master plan. All funding requested in this report is allowed for in the council's capital plan.

The programme has interfaces with many services and staff associated with the council's operational facilities and the built environment who the delivery team consult and engage with on the programmes design and construction. To support the services, it is proposed that up to £2m will be reallocated from the Construction Budget to cover these internal staff costs associated with the construction delivery.

In parallel the services are also preparing for the opening of the operational facilities to coordinate with the completion of construction of each phase.

The human resource and financial implications associated with this report are set out in more detail in sections 2.1.1, 2.1.2, 2.1.3, 2.2.1, 2.2.2, 2.2.3, 2.3, 2.4, 2.5 and 3.2.

Date signed off by <u>Strategic Director,</u> Executive Director for Place • Growth & Regeneration	**David Shepherd, 28th August 2025**
Is it also signed off by the Service Director for Finance?	**Kevin Mulvaney, 29th August 2025**
Is it also signed off by the Service Director for Legal Governance and Commissioning?	**Samantha Lawton, 28th August 2025**

Electoral wards affected: Our Cultural Heart is located in the Newsome ward. However, in terms of the council's strategic ambitions the programme is of importance to all wards in Kirklees.

Ward councillors consulted: As part of preparing for the public consultations for the master plan planning and listed building applications ward councillors were given a briefing and then a preview session of the public consultation material.

Public or private: Public Cabinet report with public and private appendices.

Certain appendices included in Section 9 are private in accordance with Schedule 12A Local Government Act 1972, as amended by the Local Government (Access to Information) (Variation) Order 2006 namely it contains information relating to the financial and business affairs of third parties (including the Authority holding that information). It is considered that the disclosure of the information would adversely affect those third parties including the Authority and therefore the public interest in maintaining the exemption, which would protect the rights of an individual or the Authority, outweighs the public interest in disclosing the information and providing greater openness and transparency in relation to public expenditure in the Authority's decision making.

The private appendices are numbers 2,4,6,9,10b,11 and 12.

Has GDPR been considered? Yes

1. Introduction

Despite the challenging financial context affecting Local Government, it is widely recognised that stimulating economic growth is vital, to not just create opportunities for local residents but increasingly to generate the future local tax base that can help meet the increasing cost of delivering local authority services.

The ambition of Our Cultural Heart, as part of the Huddersfield Blueprint, is to help with the delivery of many of the council's strategic social, economic, and cultural objectives by being a catalyst for change and regeneration in the town centre, creating a coherent, safe, inclusive, and family friendly cultural offer. Set on a central campus between King Street and Queensgate Our Cultural Heart will celebrate the heritage of Huddersfield while offering new cultural and leisure experiences for residents and visitors alike.

The council's investment in Our Cultural Heart is a fundamental part of the regeneration of the town centre and will create core facilities and encourage the provision of ancillary facilities, services, and opportunities by private, third and academic sectors, working in partnership with the council, helping to secure the future of existing businesses and attract new investment. This catalytic role will help in creating a platform to deliver inclusive economic growth and social vibrancy of Huddersfield and the wider Kirklees area for the benefit of all communities.

When the assets that make up Our Cultural Heart are operational and available for use by the residents of Kirklees, it is anticipated that a number of them will be free to use and being centrally located will be easily accessible by public transport. The campus style development,

which sits adjacent to Huddersfield University, the Town Hall, Lawrence Batley Theatre and Kingsgate Shopping and Leisure Centre, also means that there are many attractions/facilities in one place with a variety of offers that are family friendly and appealing to all age groups.

As well as a place for leisure Our Cultural Heart will also create a variety of new job opportunities that are accessible by bus and train and these new 'workers' in the town centre will need the services that already exist thereby increasing spend in the town and supporting those local businesses.

It is also encouraging that changes are already happening with the council's commitment to the blueprint and Our Cultural Heart being matched by Huddersfield University on their National Health Innovation Campus where one facility has opened, and construction is progressing on the second and will be significantly enhanced by the £11.5 billion Transpennine Route Upgrade works by Network Rail.

As a major transformational programme, progress on Our Cultural Heart is regularly reviewed by Cabinet through the gateway process with key milestones for progressing each phase of the programme. This approach allows Cabinet to take stock of progress and consider factors such as changing market conditions, phasing delivery and timing, the developing design, affordability, and stakeholder views. At each stage, Cabinet is invited to endorse the outcomes of the gateway and or approve delegated authority and decide whether and how to move forward.

Also to coordinate with the completion of construction the council's operational and support services are preparing (pre and post opening) for the fit out, operation, facilities management, maintenance, etc of the assets, service areas and public realm. This work and the associated budgets were previously being coordinated through the Town Centre Operational Management Board and are now being managed by the Our Cultural Heart Mobilisation Steering Group. Progress and updates on these budgets are set out below in sections 2.1.2 and 2.2.2 and will be subject to ongoing review.

The programme has previously been considered by the Cabinet on six separate occasions. Similarly, the programme has been the subject of consideration at the Growth and Regeneration Scrutiny Panel on several occasions, with the last update being considered in August 2025.

The previously approved Cabinet reports are available through the links in Section 8 of this report.

2. Information required to take a decision

Although the main subject of this report is Phase 2 the updates on the other phases and the rest of the master plan are set out in their chronological order.

2.1 Phase 1

2.1.1 Construction

Phase 1 is the repurposing and upgrading of the Grade II listed former Queensgate Market and adjoining Piazza Shopping Centre retail units following their closure and includes the delivery of,

- New library, including West Yorkshire Archive
- Food hall (operated by a tenant)
- Public square/public realm
- Basement service areas.

See Appendix 1, Phase 1 Red Line Boundary Plan (public)

BAM Construction Limited (BAM) were selected as the preferred design & build contractor and appointed under the Pre Construction Services Agreement (PCSA) in mid-2023 and then subsequently awarded the JCT construction contract for Phase 1 in August 2024 with construction completion due in Spring 2026 and opening in Summer 2026.

The initial focus of work that is now nearing completion included the demolition of the retail units and elements of the structure and basements. The substantive elements of this work took longer than expected and have delayed the contractor by nine weeks. After a review an extension of time was granted for the nine weeks with BAM taking responsibility for costs associated with three weeks.

Works in the current period include replacement of the drainage, casting replacement concrete floors and installing the high level glazing and the structural framing for the large glass perimeter and solid walls to the food hall.

The Clients construction delivery team continue to manage and monitor the progress of Phase 1 and report the same to the monthly Programme Board meetings.

The approved construction budget for Phase 1 from Gateway 3 (June 23) to completion of construction includes a contingency but due to unexpected costs on a number of items (further concrete repairs, commerce sculpture repairs/hanging, etc) this report requests a further draw down of £500k (included in Recommendation 6) to cover the cost of these known extras. This would take the approved budget for Phase 1 to £58.370m which is allowed for in the council's capital plan.

See Appendix 2, Phase 1 Construction Budget (private).

2.1.2 **Operational Services**

This section provides a review and refinement of the estimated additional budgets for Phase 1 that were approved at the last Cabinet in January 2025 and subsequently allowed for in the council's Medium Term Financial Plan (MTFP).

The costs set out below are included Recommendation 7 (capital) and Recommendation 11 (revenue).

The council services that will operate facilities in Phase 1 of Our Cultural Heart are,

- Libraries
- Creative Developments (Events)
- West Yorkshire Archives will also be hosted within the library.
- The food hall provider will be a third party as set out in Section 2.1.4.

Support services such as Corporate Landlord, IT, and Highways & Streetscene will provide their usual input as with any asset.

Phase 1 is expected to be operational in Summer 2026.

This report sets out the further additional budget requirements and revisions for Phase 1 as set out below. Also, for the figures in tabular form see Appendix 3, Phase 1 Services Additional Budgets (public).

2.1.2.1 **Libraries**

Post-opening costs,

- **Revenue** 80k contingency budget, spread across two financial years as set out below
  - 26/27 55k
  - 27/28 25k

2.1.2.2 **West Yorkshire Archive Service (WYAS)**

WYAS will be housed in the library with their operation including a new storage facility. At the moment WYAS keep the Kirklees archives in several different stores which would be vacated once this new facility is available.

Pre-opening costs,

- **Capital** WYAS requested £265k for the preparation of the archive to move into the OCH. This has been factored into the council's capital plan and is to be funded from the Construction Budget.

2.1.2.3 **Events**

Post- opening costs,

- **Revenue** An increase of £60k is requested in addition to the current events budget of £100k, this is to fund an Event Officer who will.
  - Enhance collaboration with other Huddersfield sites and partners.
  - Inform future requirements and planning.
  - Evaluate learning from the first 12-18 months of post opening to inform future budgets.
  - To note – the development of The Councils events offer has a dependency on our ability to deliver our wider cultural ambitions for Kirklees.

2.1.3 **Support Services**

Post-opening costs, annual.

- **Revenue** A revised Corporate Landlord budget of £412 k is required, an increase of 96k, due to the refinement of ongoing maintenance costs and an increase of the National Non- Domestic rates for the library.

2.1.4 **Food Hall**

Alongside the other facilities the food hall is another important part of Our Cultural Heart adding to the sense of community by creating a space for social interaction, collaboration and gatherings for families, friends and visitors alike.

The intention is that the food hall tenant will be a specialist company who will manage multiple independently operated food kitchens providing opportunities for local businesses to showcase their food offerings and be part of the economic growth and job creation.

A preferred tenant has been selected and the negotiations to conclude this property letting are currently ongoing with a target date for completion of contracts in Q4 2025.

This report requests delegated authority to conclude the tenant selection process, negotiate the commercial terms and complete the Agreement to Lease and the Lease.

The preferred food hall tenant's proposals are set out in Appendix 4, Food Hall Presentation (private).

2.2 Phase 2

2.2.1 **Construction**

Phase 2 is the repurposing and upgrading of the Grade II listed former library building following its closure and includes the delivery of,

- Combined museum & art gallery,
- Public realm
- Basement service areas.

See Appendix 5, Phase 2 Red Line Boundary Plan (public).

To carry out the works for Phase 2 it will be necessary to use the Queen Street plot (see Section 2.3 for the Our Cultural Heart Master Plan Layout) as a site compound.

As part of the last Cabinet report (21st January 2025) delegated authority was given to progress the Pre-Construction Services Agreement (PCSA) and pre-PCSA works for Phase 2 and BAM have been appointed using the Crown Commercial Services (CCS) framework. Phase 2 is currently in the pre-PCSA period and the delegated authority's already in place will be relied upon to award the PCSA contract.

The purpose of the pre-PCSA period is to de-risk the main construction works on site. As part of this the initial focus for BAM and their designers has been working with the museum & gallery service, to revisit the Royal Institute of British Architects Stage 3 design (RIBA 3) and carry out a value engineering(VE) exercise to mitigate the budget overage of £7m of which it has been possible to target a saving of £3m. The Leader (11/3/25) and the Portfolio Holder for Finance & Regeneration (18/3/25) were consulted on the sign-off of the VE proposals and the £4m budget allocation for the approved design.

Investigations of the building are also an important part of the pre-PCSA and therefore at the same time as the design work BAM carried out an intrusive asbestos and other deleterious materials survey which showed that there is more asbestos in the building than was

anticipated and needs removing prior to any further activity. Other surveys continue where possible including windows, etc.

Within the approved PCSA budget there was an allowance for some asbestos removal, but with the quantities discovered an extra £1,006,100 has been allocated to this task. The removal of the asbestos and associated works has commenced which will mitigate risk and disruption associated with further survey works and the execution of the future strip out, demolition and construction works.

Whilst this sum will apply to the overall cost of Phase 2, in the short term, the cost of the works has been funded from within the contractor portion (£5.413m) of the approved PCSA £8.152m budget. This has been achieved by reallocation and reprogramming of activities from the PCSA period into the main construction contract. Approval to reallocate the budget and progress the asbestos removal was given by the Executive Director of Place with the decision notice being published on the 5th June 2025.

The agreed design modifications are being incorporated into the revised RIBA 3 in parallel with the asbestos removal with the target to complete both by the end of November 2025 and then appoint BAM under the PCSA. Although the revisions do not significantly change the principles of the design they will require listed building and planning approval. Delegated authority's already in place (Cabinet report 21st January 2025) will be relied upon to sign off the RIBA 3 design.

Under the PCSA further surveys (structural, etc) will be carried out but it has already become evident that there are a number of potentially significant issues that will need dealing with and or mitigating. At the same time the RIBA 4 design will be progressed, and the JCT construction contract and the associated contract sum negotiated, with the target to conclude both during April 2026. In the interests of maintaining the programme it may be prudent to bring forward works (as enabling works) with match funding from the post PCSA period.

The appointment of BAM for the main construction works and the start on site is subject to the outcome of the PCSA and this report requests delegated authority to sign off the conclusion of Phase 2 Gateway 4 and then to award the JCT construction contract and the associated programme on the basis of not exceeding the Phase 2 Construction Budget. The target for completion of construction is Q1 2028 with opening in Q1/Q2 2029 after the museum & gallery fit out period.

This report requests further draw down for Phase 2 of £51.895m (included in Recommendation 6) as allowed for in the council's capital plan to fund the period from Gateway 4 to completion of construction. For the breakdown of this sum including contractors and delivery team costs etc see Appendix 6, Phase 2 Construction Budget (private). Included in this figure is £4m for the approved scheme, £1m for the asbestos removal and £5.5m extra contingencies to cater for the risks and any programme implications associated with the building. If the budget cannot be achieved the matter will be brought back to Cabinet.

2.2.2 **Operational Services**

As with Phase 1 this section provides a review and refinement of the estimated additional budgets for Phase 2 that were approved at the last Cabinet in January 2025 and subsequently allowed for in the council's MTFP.

The costs set out below are included Recommendation 7 (capital) and Recommendation 11 (revenue).

The council services that will operate facilities in Phase 2 of Our Cultural Heart are,

- Museum and Galleries

Support services such as Corporate Landlord, IT, and Highways & Streetscene will provide their usual input as with any asset.

The target for Phase 2 to become operational is Spring 2029.

This report sets out the further additional budget requirements and revisions for Phase 2 as set out below. Also, for the figures in tabular form see Appendix 7, Phase 2 Services Additional Budgets (public).

2.2.3 **Support Services**

Post-opening costs, annual

- **Revenue** A revised Corporate Landlord budget of £524k is required, an increase of £174k, due to the refinement of ongoing maintenance costs and an increase in the National Non-Domestic rates.

- **Capital** A provisional estimate of £200k is required for non-construction IT infrastructure and hardware costs, this would need to be accommodated by the reallocation of funds from the Construction Budget .

2.3 Master Plan

Planning and listed building consents for all the phases of the RIBA design stage 3 master plan were approved by the Strategic Planning Committee on the 2nd March 2023.

The timing and order of the phasing is flexible to accommodate the needs of the council and the programme and is reassessed regularly. Prompted by the venue review, and as development opportunities for the Queen Street plot continue to be investigated, the outcomes of the most recent phasing review is the proposal to demolish the remaining retail units and that the construction of the park is progressed as Phase 3. One of the added benefits of this strategy is that the ‘early’ delivery of the park offers free amenity for all.

A feasibility budget allowance of £500k has previously been approved for design fees and investigative work to develop the master plan and consider opportunities including work on the Queen Street plot and the venue.

For the layout of the master plan and the associated phases see Appendix 8 Our Cultural Heart Master Plan Layout (public).

2.3.1 **The Park**

Before the park can be built the remaining Piazza Shopping Centre retail units need to be demolished. The council can control the timing of vacant possession, subject to the service of the appropriate notices.

Subject to coordination with Phase 2 it is proposed that demolition of the retail units is brought forward to follow on as soon as possible after Boots vacate to minimise the empty business rates and other costs of looking after and securing the buildings totalling c£600k per annum that the council as landlord would incur. Then to maintain the council's wider capital budget commitments the construction of the park (Phase 3) would follow on twelve months after the completion of the demolition as previously planned, however ways of closing this gap will be investigated.

To make best use of the empty units as retailers have vacated and prior to redevelopment some of the units are occupied by meanwhile uses and if they require assistance the council is investigating opportunities to find relocation sites for them and any remaining retailers within the town centre.

The coordination of the demolition with the Phase 2 works may mean that it is instructed as part of the Phase 2 contract or if it is a separate contract will either be from a framework or possibly a single stage tender rather than the two stage process that has been utilised for the more complex Phase 1 and Phase 2 refurbishments of the Grade II listed Queensgate Market and the Grade II listed former library and will be in accordance with the Procurement Act 2023.

To maintain the programme this report requests delegated authority to instruct the necessary preparations including project management, surveys, design work, procurement and then the award of the demolition contract on the basis of not exceeding the demolition budget of £5.834m (included in Recommendation 6). For the breakdown of this sum including contractors and delivery team costs etc see Appendix 9, Retail Demolition Budget (private) as allowed for in the council's capital plan. An enhanced allowance has been included to accommodate risk associated with asbestos surveys and then removal.

Based on the current programme the target is to start demolition during May/June 2026 and complete by Q1 2027. If Boots vacate sooner the works may commence earlier. The construction of the park would then start in Q1 2028 with a target completion of Q2 2029.

2.3.2 **The Venue**

Due to the council's changed financial position and the reallocation of funds from the original Construction Budget (substantially from the venue phase) a review of the business case associated with the venue and car park is being carried out by IPW who developed the original Our Cultural Heart business case.

Stage 1 of the review revisited tenant/operator demand through soft market testing and also reassessed the catchment, competition and content. The findings confirm support for a flexible multi-purpose venue with a capacity of 1,200 in a fully seated mode and a maximum capacity of 2,000 using a standing floor and seated balcony, maintaining the ability to split the auditorium into two spaces and with the addition of flexibility to accommodate theatre productions to attract new touring content.

Stage 1 was completed and signed off in June 2025 and Stage 2 is due to conclude in Q4 2025. See Appendix 10a, Kirklees OCH Venue Feasibility Stage 1 Report (public). In the public appendix parts have been redacted including the names of the interested operators. For the private report see Appendix 10b.

Stage 2 is underway and will further test the interest from operators and will consider in more detail the mix, identity and quantity of content for a typical programme of events investigating the opportunity to bring regional audiences to Huddersfield who might not have otherwise come to the town. This will inform the concepts for the venue redesign, the associated costings, the customer numbers, business plan, the programme for delivery and operator selection process. Following Stage 2 the outputs of the full review will be brought back to Cabinet.

In the interests of achieving the most cost effective design and affordability any necessary car parking provision will need to be separate from the venue and be self-financing with the Queen Street plot being one possible option subject to viability assessments as set out below. Following the various reallocations from the original Construction Budget (as set out in Section 3.2) not enough budget remains to deliver the venue and new sources of funding/grants will be investigated.

2.3.3 **Queen Street Plot**

In parallel with the venue review a car park specialist is being engaged to further investigate proposals to develop the site for a multi storey car park including soft market testing to explore third party developer interest. There are, however, some challenges with the layout of the site and its setting within the master plan, which impact the car park footprint and design and the associated development costs. In addition, the basement servicing strategy will need reviewing.

To understand the car parking requirements of Our Cultural Heart a review of parking demand and capacity will be undertaken.

In addition to car parking the other potential uses for the plot are typical of a town centre site including residential, hotel and office. There is a budget allowance for clearing and preparing the site (infrastructure costs), but any development proposals will need to be supported by their own source of funding separate from the council's resources.

Also, all the options have a viability gap in their high level appraisals, but this improves with lower interest rates and the possibility of future rounds of strategic intervention funding (i.e., successors to levelling up, Town Fund, Future High Streets Fund) to assist in closing the gap for each of the options.

2.4 Client Construction Delivery Team

The council's commissioned Client construction delivery team working on the project management, design and construction capital delivery across all the phases and workstreams have worked on the programme from the beginning and is made up of the Strategic Delivery Partner (Turner & Townsend), Architect (FCB) and the Multi-Disciplinary Engineer (Arup). The team is supplemented with other specialists as and when required.

The delivery team are all separately appointed by the council under the NHS Shared Business Services Construction Consultancy Services Framework. Retaining this team, subject to agreement on fees for each phase and or stage within a phase and as approved through

previous Cabinet reports, is important to retain the knowledge gained and achieve efficient delivery for the council.

The fees associated with this team are included in each of the phase budgets and the master plan feasibility budget.

2.5 Our Cultural Heart Mobilisation Steering Group

To complement the work of the Town Centre Operational Management Board, that focuses on the whole of the Huddersfield Town Centre, the OCH Mobilisation Steering Group was established at the beginning of the year to specifically focus on coordinating the operational and support services preparations for the openings within Our Cultural Heart including the associated pre and post opening budgets. The details of these costs are set out in sections 2.1.2 and 2.2.2.

2.6 Sustainability

The Our Cultural Heart sustainability strategy has encompassed the council's 2038 Carbon Neutral Vision and policies encouraging sustainability and minimising the carbon footprint of the programme within affordability limits. It is recognised that a net zero economy, design, construction, and operation cannot be achieved overnight, but will be a process of incremental and positive actions to meet 2038 targets.

The established sustainability strategy for the master plan includes no gas on site, reduced rainwater run-off and the target for the built environment remains BREEAM Excellent.

2.7 Social Value

Social Value(SV) has been an integral element of the Our Cultural Heart programme from the outset both in terms of the outcomes and the process of getting there and SV outcomes have been embedded in contracts at all stages and embraced by the wider project team.

The SDP, architect and engineer continue to deliver their SV commitments across the programme and the Social Value Portal is being used to measure the outputs. Social Value Portal is endorsed by the Local Government Association and helps us to procure, measure, manage and report SV via a single platform.

Since starting the construction contract on site in August 2024 BAM have been delivering SV and making payments into the Our Cultural Heart SV fund. Quarterly meetings have been established with the council to facilitate BAM's activities and share knowledge. The fund will be administered through the One Community Foundation.

Subject to lessons learned the same approach to SV will be used on future phases.

3. Implications for the Council

3.1 Council Plan

The Kirklees Council Plan contains areas of focus to prioritise the business of the council. One of these areas of focus is 'Investment and Place' with Our Cultural Heart being one of the named programmes. In bringing forward the next steps and the recommendations for this

regeneration programme this report directly delivers against the council's plan to transform the experience within the town centre for residents and visitors alike and act as a catalyst for future investment.

3.2 Financial Implications

The council's existing multi-year revenue and capital medium term budget plans and financial strategies for 2025/26 and future years, approved at Budget Council on 5th March 2025, continues to acknowledge that Our Cultural Heart is a significant strategic investment priority commitment to deliver major long term sustainable regeneration for the borough.

Since the inception of the Our Cultural Heart programme, and as well documented, the council's overall financial position and the cost of borrowing for capital has worsened and continues to be under pressure. This has led to reduced budgets for capital delivery across the council and most of the council services that will operate in Our Cultural Heart.
To mitigate the situation, in the last Cabinet report dated 21st January 2025 defined amounts of funding were reallocated from the programme's original Construction Budget to support elements of the service's capital costs which meant that of the original £262.64m Construction Budget £237.94m remained following the January Cabinet.

In addition to these reallocations, on the 5th March 2025 Full Council approved the further reallocation of £37.36m from the Construction Budget for use in other capital projects across Kirklees. Also, in this report other reallocations are proposed to cover costs that were originally excluded from the Construction Budget including council staff resource associated with the construction delivery (£2m) and an allowance for property costs (£750K) associated with leases coming to an end etc. Together with the further reallocation to WYAS (£265k) for archive cleaning, this leaves a current Construction Budget of £197.56m.

For the overall master plan budget including the reallocations of budget see Appendix 11, OCH Master Plan Budget Summary (private) that sets out the construction budgets for each phase and the funding that remains to contribute to the construction costs of the venue.

The cashflow is regularly reviewed with the finance team for incorporation into the council's overall capital plan considering where any pressures can be smoothed out, which in the interests of affordability may impact on the timing of the later phases of Our Cultural Heart.

3.2.1 Budgets

3.2.1.1 Construction

The previously approved construction expenditure for the programme is a total of £78.957m for the period up to May 2026 and this report requests approval to the new draw down as set out below totalling £58.228m as set out in section's 2.1.1 and 2.2.1 and as allowed for in the council's capital plan.

£57.905m was previously approved for Phase 1 but then £35k of the fee budget was transferred to Phase 2 leaving £57.870m allocated to Phase 1 which is the figured used below.

	New Draw Down £	Previously Approved £	Total £
PHASE 1 **Library, food hall & public square** • To construction completion	500k	57.870m	58.370m
PHASE 2 **Museum & gallery** • Gateway 4 to construction completion	51.894m	8.152m	60.046m
MASTER PLAN • Gateway 3	--	12.435m	12.435m
• Retail demolition	5.834m	--	5.834m
• Feasibility work ➢ Venue review ➢ Queen Street plot	--	£500k	£500k
TOTAL	£58.228m	£78.957m	£137.185m

See Appendix 12, Construction Budget, Phase 1, Phase 2, Retail Demolition & Master Plan Allowances (private), which gives a breakdown of the £137.185m that, subject to approval, will be committed for project management, design and construction costs.

Whilst the Construction Budget for delivery of the assets within the master plan is budgeted to be funded from council prudential borrowing, phasing provides time for ways of replenishing the Construction Budget, following the reallocations, from third party investment or external funding applications but without increasing the council's capital borrowing commitments.

The reallocations from the Construction Budget have substantially been from the later phases and so subject to the conclusion of the ongoing venue review new sources of funding will be required to provide the total funds to deliver the venue and any associated car parking requirements.

3.2.1.2 Operational Services

The estimated total revenue budget for Phase 1 including the amounts approved in January and those included in this report is £673k in financial year 26/27, rising to £722k in 29/30.

Likewise, the indicative figures for Phase 2 are £127k in 26/27, rising to £1.314m in 30/31.

These are the current best estimates, and the operational budgets will continually be refined and reported at future gateways. Across all phases the opportunities to manage these costs also include working with partners and or attracting third party funding to offset a proportion of the council's direct costs.

See Appendix 13, Additional Revenue Budgets Phase 1 & Phase 2 (public)

3.3 Legal Implications

Legal Services are involved in the procurement process and appointment of the consultants and contractors.

Legal Services, and the external framework firm, are involved in the process to complete any relevant documentation in order to secure vacant possession of the Piazza Shopping Centre to enable delivery of the proposed programme through the gateway process.

There are also a number of occupiers outside the boundaries of the site who have certain rights including the use the access and service areas associated with the Piazza Shopping Centre. Legal Services, and the external framework firm, will provide any necessary advice in the process to complete any relevant documentation, including so that works can be carried out to these accesses.

Legal Services, and the external framework firm, are advising in the property letting process and contractual arrangements with the food hall tenant and will be involved with future tenants and other third parties.

The Council must comply with its duty under the Public Services (Social Value) Act 2012 as noted in Section 2.7 above the Council will consider how services/works are procured to improve economic, social and environmental wellbeing of the area.

The Council has a duty of Best Value under section 3 of the Local Government Act 1999 to make arrangements for continuous improvement in the way its functions are exercised, having regard to a combination of economy, efficiency and effectiveness.

The Council in carrying out its functions must comply with the Public Sector Equality duty under section 149 Equality Act 2010 before exercising any decision on a particular policy or strategy is taken ; namely it must have due regard to the need to eliminate unlawful discrimination, harassment, victimisation; advance equality of opportunity between persons who share protected characteristics and those who do not, and foster good relations between those who share protected characteristics and those who do not.

Section 1 of the Localism Act 2011 gives the Council a general power of competence to do anything that individuals generally may do, subject to specified restrictions and limitations imposed by other statutes.

The Council will comply with its Contract Procedure Rules and Financial Procedure Rules; and the Public Contracts Regulations 2015 and/or the Procurement Act 2023 in relation to Goods, Works and Services.

Section 123 of the local Government Act 1972 provides the legal power to enter into the agreement for lease and lease with the food hall operator for the best consideration reasonably obtainable

3.4 Climate Change and Air Quality

Both Climate Change and Air Quality are key parts of the Our Cultural Heart master plan and design. This in turn informed the planning application, the sustainability strategy and the detailed design work.

In addition, climate change initiatives are associated with the delivery and promotion of other projects and programmes for example sustainable transport modes that help to reduce adverse transport derived impacts on communities and public health. Public transport can be used to access Our Cultural Heart from both the railway station and the bus station.

3.5 Other (e.g. Risk, Integrated Impact Assessment or Human Resources)

3.5.1 Risk

The risk management strategy for Our Cultural Heart is supported by the programme gateway method of decision and delivery. At each gateway Cabinet are invited to review progress to date, reflect on the current and specific circumstances, and determine the most appropriate way forward for the overall programme.

As part of this process and to manage financial risks associated with debt servicing costs on new council borrowing, and so that overall borrowing can be managed, the adoption of phasing allows borrowing to be timed and matched with affordability.

As reported previously the SDP/project manager maintains a risk register for the construction programme and the active phases within it. Similarly, the OCH Mobilisation Steering Group maintains a risk register for the council services.

Subject to budget being reallocated and not being replenished or alternative sources of funding found there is a risk that the full master plan cannot be delivered without modifying the scope as set out in section 3.2.

3.5.2 Integrated Impact Assessment

A two stage Integrated Impact Assessment (IIA) was undertaken to assess the impact of the proposed Our Cultural Heart programme and what needs to be considered in the design of the master plan and the assets within it. The IIA considers equality impact, covering the nine protective characteristics set out in the Equality Act 2010, plus environmental impact and the effects on low earners and unpaid carers.

The IIA was previously included with the Gateway 3 Cabinet report (June 2023) and is considered appropriate for this report. It is included here at Appendix 14 (public).

4. Consultation & Engagement

A number of consultations took place in 2018 and 2019 as part of developing the Huddersfield Blueprint and then building on this work further consultations took place for the Our Cultural Heart master plan proposals and in preparation for the master plan planning and Listed Building applications in 2022.

Further consultation was also part of the design modifications process, and the subsequent planning and Listed Building applications associated with Phase 1 and more recently Phase 2 during 2024 and into 2025. This process will be repeated as and when any further modifications are required for planning.

There is regular consultation and engagement with the council services with regard to design development of the assets within each phase and for Phase 1, working with the OCH

Mobilisation Steering Group, this has now also moved into supporting the transition from construction to operational facilities.

A programme of this scale will continue to require regular engagement and consultation at various stages of the programme development and delivery of phases. This is supported by our public engagement including,

- the website Our Cultural Heart - Home
- regular newsletters with the recent summer edition OCH Summer Newsletter 2025 which also includes an online questionnaire to let the council know how you plan to use Our Cultural Heart
- and events like,
  - sponsoring the recent Kirklees Pride 2025
  - Huddersfield Unlimited Business Forum on site in June
  - upcoming Heritage Open Day in September where you will be able to see first-hand progress on site.

5. Options

The option around the preferred way forward and the built form and the scope of the master plan was approved at Cabinet in September 2022 with the associated £262m Construction Budget being approved in June 2023.

As the programme has developed and options arisen (as with this report) choices have been made and approved at the Cabinet reports preceding this one and the previous approved Cabinet reports are available through the links in Section 8 of this report.

Phase 1 is in the construction stage and Phase 2 is in the pre-construction stage with a target to start construction on site in April/May 2026 as set out in sections 2.1.1 and 2.2.1.

The concept and design for Phase 2 developed through the optioneering for the combining of the museum and gallery into one building. The principle of combining the operations was approved at Cabinet in June 2023. Then the option to utilise the already planning approved museum envelope was approved at Cabinet in December 2023 to provide the most cost effective solution in terms of capital spend and operational costs. During 2024 the internal layout of the building was significantly redesigned to maximise the available useable floor/wall and display space. Then again the design has been revisited during 2025 to make budget savings.

As set out in Section 2.3 the options for the next phase of construction have been considered and it is proposed that the park is progressed as Phase 3 and to prepare for this the remaining retail units need demolishing. The target date to start the demolition is May/June 2026.

The options associated with the venue (Section 2.3.2) are being considered through the ongoing review and the use of the Queen Street plot (Section 2.3.3) for a multi storey car park is being investigated.

As part of the design and budgeting process across all phases, it is natural to consider options and then discount or adopt them on the basis of meeting the brief, deliverability, value for money, affordability and mitigating budget overages.

6. Next steps and timelines

The current key milestones and gateways for Our Cultural Heart programme are set out below. As each phase is progressed gateways 3, 4 & 5 will be repeated.

The programme commenced on the 22nd June 2021 and achieved Gateway 3 including planning and Listed Building consents for the entirety of the master plan in June 2023. These consents have been re-submitted for phases as modifications have been incorporated into the designs.

Phase 1 Key Dates

Gateway 3	PCSA	PCSA starts	June 2023
		RIBA 4 design complete	December 2023
		Surveys & enabling works	March 2024
		Contract sum negotiation	
		PCSA concluded	July 2024
Gateway 4			
	D&B JCT construction contract award	Substantial start on site	August 2024
	Food hall letting		Q4 2025
Gateway 5	Construction completion		Q2 2026
	Open to public		Summer 2026 (target)

Phase 2 Key Dates

Gateway 3			Jan 2025
	Pre-PCSA	Procured D&B contractor	Q1 2025
		Asbestos survey	Q2 2025
		Asbestos removal and minor works start	June 2025
		Asbestos removal complete	November 2025
		Conclude RIBA 3 redesign	October 2025
	PCSA		Q4 2025
		RIBA 4 design	
		Contract sum negotiation	
Gateway 4	D&B JCT construction contract award	Substantial start on site	Q2 2026

Gateway 5	Construction completion		Q1 2028
	Open to public		Spring 2029 (target)

Retail Demolition Key Dates

	Preparation		Q3/Q4 2025
	Procurement		Q1 2026
	Retail demolition contract award	Substantial start on site	Q2 2026
	Demolition completion		Q1 2027
	Park construction		Q1 28 to Q2 29

7. Contact officer

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8. Background Papers and History of Decisions

- **March 2019 -** Cabinet Report - Assembling land and property – Huddersfield Town Centre (Piazza)
  https://democracy.kirklees.gov.uk/documents/s29122/Item%2014%20Land%20Assembly.pdf
- **August Oct 2019 -** Huddersfield Blueprint Place Standard Exercise – Results
  https://howgoodisourplace.org.uk/huddersfield-town-centre/

- **February 2020 -** Cabinet report - Huddersfield Blueprint - Next Steps.
  https://democracy.kirklees.gov.uk/documents/s34958/Item%2015%20CAB%20%2020%20-%20071%20-%202020-02-25%20Cabinet%20Huddersfield%20Blueprint%20-%20Next%20Steps%20Final.pdf

- **September 2020 -** Cabinet report Dewsbury and Huddersfield Town Centre Finance.
  https://democracy.kirklees.gov.uk/documents/s37506/Town%20Centre%20Finance%20 Cabinet%20Report%20-%20Final%20Version.doc.pdf

- **June 2021 –** Cabinet report – Cultural Heart, part of the Huddersfield Blueprint – Next Steps.

https://democracy.kirklees.gov.uk/documents/s41881/Delivering%20the%20Cultural%20Heart%20Cabinet%2022.6.21%20002.pdf

- **November 2021 -** Cabinet report, Cultural Heart, part of the Huddersfield Blueprint, Gateway 1. https://democracy.kirklees.gov.uk/documents/s43757/PUBLIC%20CUTLURAL%20HEART%20Cabinet%20Report.%20Final%2016.11.21.pdf

- **September 2022 -** Cabinet report – Cultural Heart, part of the Huddersfield Blueprint – Gateway 2. https://democracy.kirklees.gov.uk/documents/s48238/PUBLIC%20Cultural%20Heart%20Cabinet%20Report%2021.9.22.pdf

- **June 2023 -** Cabinet Report - Cultural Heart, part of the Huddersfield Blueprint - Gateway 3. https://democracy.kirklees.gov.uk/documents/s52438/Cabinet%20Report%2027.6.23%20public.pdf

  December 2023 - Cabinet Report – Our Cultural Heart, part of the Huddersfield Blueprint – Phase 1 Gateway 4. https://democracy.kirklees.gov.uk/documents/s54749/Signed.%20OCH%20GW4%20Cabinet%20Report%2021.12.23%20public.pdf

- **July 2024 –** Decision – Our Cultural Heart Phase 1, Structural works to former Queensgate Market. https://democracy.kirklees.gov.uk/ieDecisionDetails.aspx?Id=12075

- **January 2025 –** Cabinet Report – Our Cultural Heart, part of the Huddersfield Blueprint – Phase 2 Gateway 3 https://democracy.kirklees.gov.uk/documents/s61864/Our%20Cultural%20Heart.%20Cabinet%20Report.%2021.1.25.pdf

9. Appendices

The appendices to the Cabinet report are set out below.

Certain appendices are private in accordance with Schedule 12A Local Government Act 1972, as amended by the Local Government (Access to Information) (Variation) Order 2006 namely it contains information relating to the financial and business affairs of third parties (including the Authority holding that information). It is considered that the disclosure of the information would adversely affect those third parties including the Authority and therefore the public interest in maintaining the exemption, which would protect the rights of an individual or the Authority, outweighs the public interest in disclosing the information and providing greater openness and transparency in relation to public expenditure in the Authority's decision making.

In the public report where appendices are private parts may be redacted, or the appendix may have been withheld.

- App 1. Phase 1 Red Line Boundary Plan (public)

- App 2. Phase 1 Construction Budget (private)

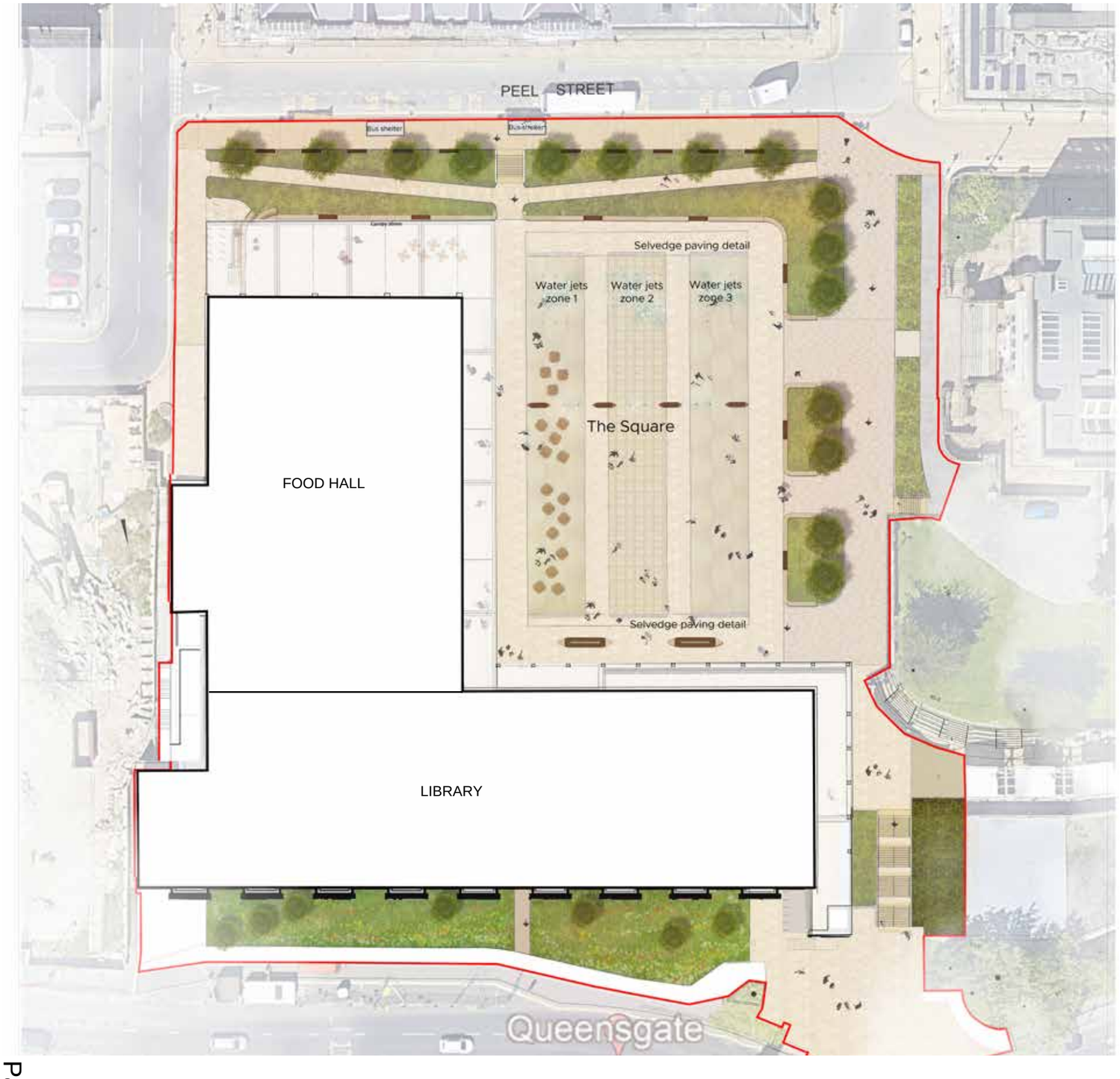
- App 3. Phase 1 Services Additional Budgets (public)
- App 4. Food Hall Presentation (private)
- App 5. Phase 2 Red Line Boundary Plan (public)
- App 6. Phase 2 Construction Budget (private)
- App 7. Phase 2 Services Additional Budgets (public)
- App 8. Our Cultural Heart Master Plan Layout (public)
- App 9. Retail Demolition Budget (private)
- App 10a. Kirklees OCH Venue Feasibility Stage 1 Report v3 (public)
- App 10b. Kirklees OCH Venue Feasibility Stage 1 Report FINAL (private)
- App 11. OCH Master Plan Budget Summary (private)
- App 12. Construction Budget, Phase 1, Phase 2, Retail Demolition & Master Plan Allowances (private)
- App 13. Additional Revenue Budgets Phase 1 & Phase 2 (public)
- App 14. Final. 220519 IIA stage-2 v3_Redacted (public)

10. Service Director responsible

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LANDSCAPE MASTERPLAN



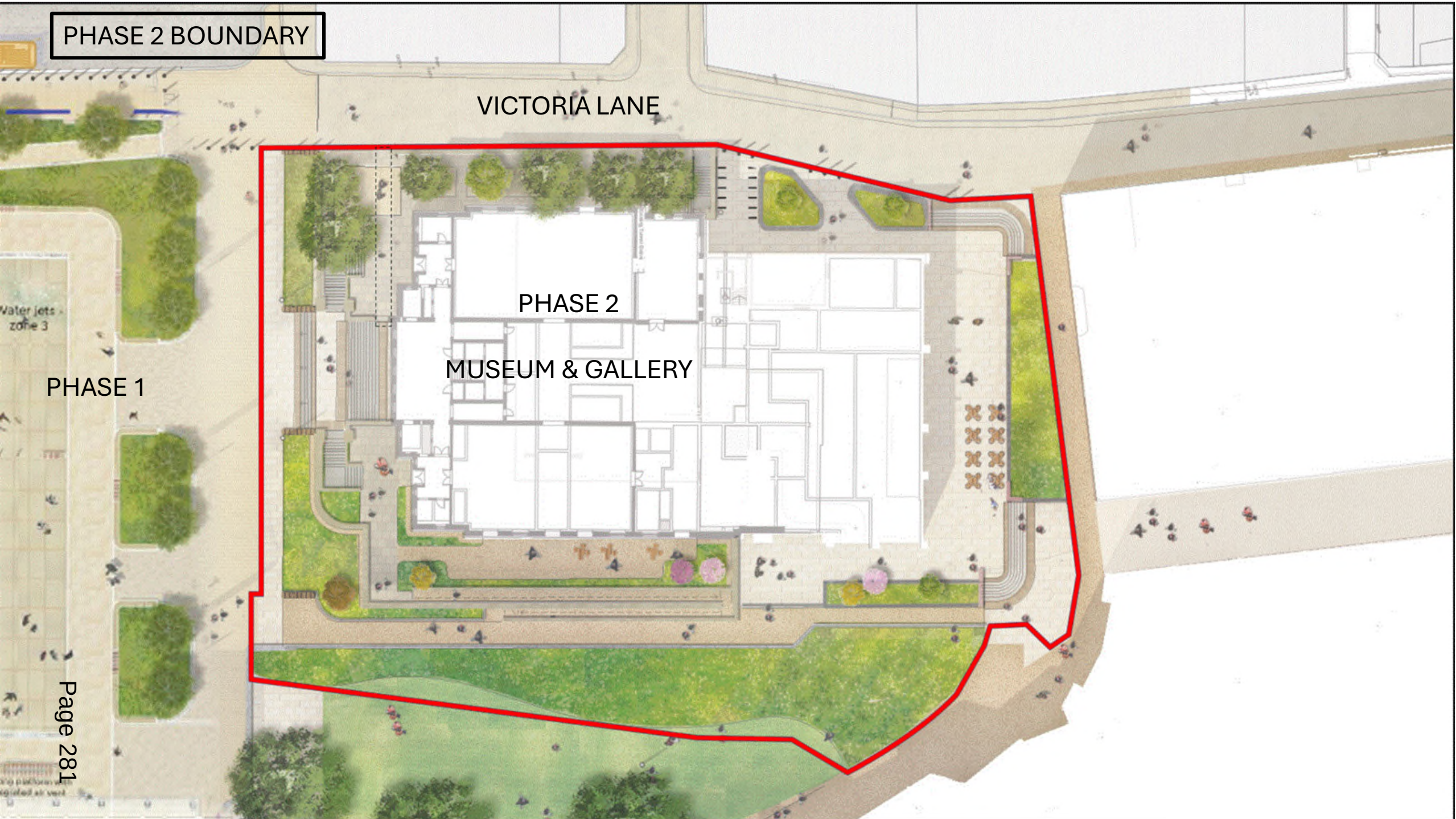
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OUR CULTURAL HEART SERVICES ADDITIONAL BUDGETS, PHASE 1

NOTE: These budgets are in addition to those approved in January 2025 that have already been incorporated into the council's capital and revenue budgets

Service	Type	Capital Pre-opening	Revenue Post-opening
Libraries	Post-opening	-	£80k over 26/27 & 27/28 only
West Yorkshire Archive Service (WYAS)	Pre-opening	£265k	-
Events	Post-opening	-	£60k pa
Support Services (Corporate Landlord)	Post-opening	-	£96k pa

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PHASE 2 BOUNDARY
VICTORIA LANE
PHASE 2
MUSEUM & GALLERY
PHASE 1
Water jets zone 3

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OUR CULTURAL HEART SERVICES ADDITIONAL BUDGETS, PHASE 2

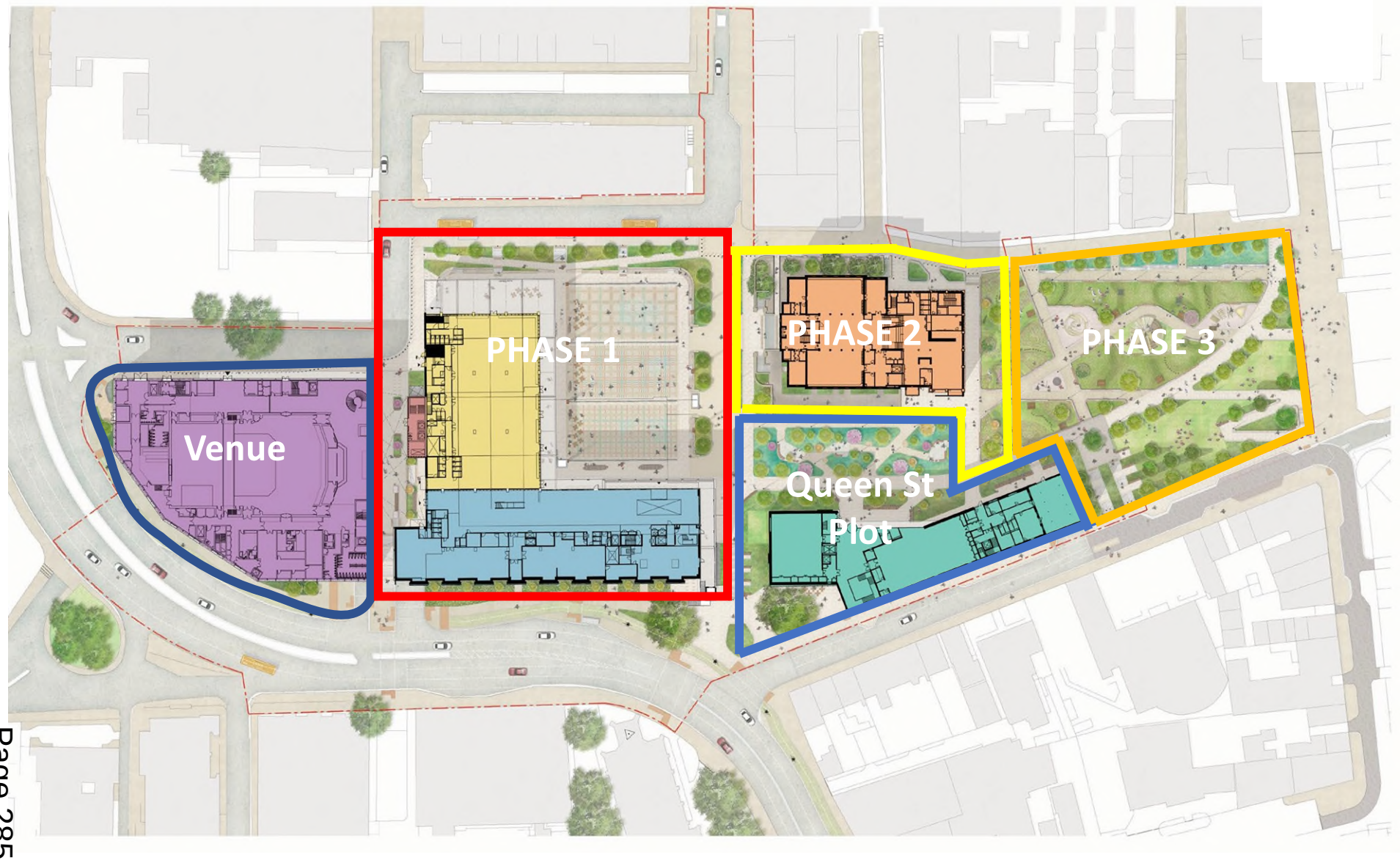
NOTE: These budgets are in addition to those approved in January 2025 that have already been incorporated into the council's capital and revenue budgets

Service	Type	Capital Pre-opening	Revenue Post-opening
Support Services (Corporate Landlord)	Post-opening	-	£174k pa
Support Services (IT)	Pre-opening	£200k (provisional estimate)	-

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MASTER PLAN LAYOUT

Approximate phasing boundaries



- LIBRARY
- FOOD HALL
- MUSEUM & GALLERY
- QUEEN STREET PLOT
- VENUE/MSCP
- PUBLIC REALM/PARK

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Integrated Impact Assessment – Stage 2 Assessment and Action Plan

Project Details

Name of project or policy:	
Cultural Heart, Huddersfield	
Directorate:	**Senior Officer responsible for policy/service:**
Growth and Regeneration	David Shepherd
Service:	**Lead Officer responsible for EIA:**
Economy and Skills	David Glover
Specific Service Area/Policy:	**Date of EIA (Stage 1):**
	25/01/2022
EIA (Stage 1) reference number:	**Date of EIA (Stage 2):**
	24/05/2022

Stage 1 Assessment Summary

Theme	Calculated Scores						Stage 2 Assessment Required
	Proposal	Impact	P + I	Mitigation	Evidence	Overall	
Equalities	10	1.7	**11.7**	0	0	**0**	Yes
Environment		0.8	**0.8**	0	0	**0**	No

A) Equalities Impact – Evidence from Engagement

CONSULTATION WITH KEY STAKEHOLDERS				COMPLETE THIS DETAIL WHEN YOU HAVE DONE YOUR CONSULTATION	
REF No.	**Which key stakeholders have you/are you consulted/ing with?**	**Why have you/are you consulted/ing them (or not?)** and what were you/are you looking to find out?	**How did you/are you planning to consult them?** Date and method of planned consultation	Actual Date of Consultation	**Outcome of consultation** What have you learned? Do you have actions to complete that will help mitigate any unnecessary negative impact on groups? [move to section B if you do]
1	Diversity and Inclusion Hub	To provide outline detail of the scheme and a reference point for future contact. Discussed the elements identified in the Stage 1 IIA	Online meeting	2 March 2022	Established contact point for ongoing engagement.
2	KC – Faith and Community Integration Manager	To discuss the provision of faith rooms in the Cultural Heart	Online meeting	4 April 2022	Identified one multi faith room would be appropriate rather separate faith rooms in each of the proposed buildings. Discussion around use, look, size, and feel of the space. Consideration to be given to examples elsewhere and site visits made if possible
3	KC- Partnership Commissioning Manager for Mental Health	To discuss how to ensure accommodation would be appropriate for people who are autistic	Online meeting	28 April 2022	Discussion around the range of issues faced with people with autism issues. Range of spaces could be provided inside the building

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					and a calm area outside would be good. Using aspects such as lighting, temperature control and opportunity outside to create less stimulating areas. Discussed planting, pop up external calm areas for when events are on Provision of different activities in the park could also cover improvements to mental health
4	Carers Group	To discuss how to ensure accommodation would be appropriate for people who are carers	Online meeting	28 April 2022	Discussion around need for blue badge parking, suitable gradient ramps for carers needing to push wheelchairs, location of frequent resting points. Changing places need to be large and accessible for duration of time activity is to be planned in this area of the town. It would be good for wayfinding to show where the accessible routes go and walking routes for promoting wellbeing and mental health. Various location of toilets. Site visit with carers and architect to be arranged to understand issues such as dropped kerbs.

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5	A site visit was completed to the new Changing Places Toilet at the Royal Armouries.			Date to be confirmed	
6.	Public Consultation	This will inform the public of progress to date on the project	There are drop-in sessions throughout the consultation period and details of the project can also be found here www.kirkleesculturalheart.co.uk	24 May-17 June 2022	See item 8 below.
7.	Co-design session	Opportunity to involve people in the design detail and for the design team to understand requirements in more detail. Lived experience of disability is invaluable, as regulations and guidance are based on averages and there will be variations in requirements.	Yes, meeting to invite input.	08 July 2022	Design and engagement teams understanding of local requirements, sensitivities and adjustments required to maximise inclusion.
8.	Phase 1 Consultation summary report	To collate consultation outreach and impact for stakeholders	Summary report	July 2022	Inclusive Design desires collated included: Improved access for disabled people. Making the town centre more welcoming, inclusive, and accessible for people with different needs - 230 strongly support, 163 support (90%). Parking accessibility - insufficient accessible bays / walking

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					distance. Blue badge parking required. Accessible changing places, including for adults. Design to include wheelchair swings in the playground, non-slip surfaces. Accessible public toilets required - numerous comments. Ample seating required. Ramped access with short travel distances, not the long way round. Mobility scooter hire within 40m of the Cultural Heart. Family areas. Youth zones for young people in the town centre. Specific town centre cycle parking to encourage more people to cycle. Spaces for different community groups required. Staircases and routes wide and accessible. Request to actively encourage participation from people with additional needs and accessibility groups. Defibrillator requested. Comments incorporated into the design.
9.	Outdoor consultation events	To further publicise the scheme on a busy warm weekend with	Wide range of exhibitions and events held over the weekend	25-27 August 2022	Wide variety of input from members of the public to

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		a range of events to attract further attention to the development and invite input.	to invite comment on the scheme. Engagement consultants, two access consultants and design team members were on hand to discuss with a wide range and age of people in the centre to invite input throughout the weekend. 270 people were engaged with during the weekend. Events included face painting, model making, photographs, discussions and exhibitions.		enhance designs. Inclusion, design and engagement teams understanding of local requirements, sensitivities and adjustments required to maximise inclusion greatly enhanced.
10.	Outlookers meeting	Opportunity to involve people with visual impairments in the design detail and for the design team to understand requirements in more detail. Lived experience of disability is invaluable, as regulations and guidance are based on averages and there will be variations in requirements.	Meeting held with Outlookers group, access consultants, design team and community engagement team. A short presentation was followed by group and individual conversations with team members to obtain input from Outlookers members. Extensive notes were collated and distributed after the event.	26 August 2022	Extensive design detail input from Outlookers was incorporated into designs. Outlookers group were not aware of the development prior to the meeting and offered a warm welcome to the engagement team. Previous history of not engaging and creating less accessible environments was mentioned, with reassurance that engagement would be ongoing, and input was welcomed. The design team learnt about alternative formats, such as large print, Braille, and the need for tactile models. When presenting images, the team learnt to describe

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					them to visually impaired people. This will help mitigate the negative impact of isolation and feelings of exclusion. It will also create more trust in the development considering the needs of visually impaired people.
11.	Carers group meeting	Opportunity to involve people who are carers in the design detail and for the design team to understand requirements in more detail. Lived experience of caring for people with an impairment is invaluable, as regulations and guidance are based on averages and there will be variations in requirements.	Meeting held with carers group, access consultants, design team and community engagement team. Conversations with team members to obtain input from Carers.	26 August 2022	Design detail input from carers was incorporated into designs. Carers group were not aware of the development prior to the meeting. A variety of issues such as parking, walking distances, level access routes and information were provided. Reassurance that engagement would be ongoing, and input was provided by the team. This will help mitigate the negative impact of isolation and feelings of exclusion. It will also create more trust in the development considering the needs of carers and disabled people.
12.	Public consultation, Phase 2	To increase the dissemination of information and feedback, ensuring that as many people as possible are invited to		15 August – 14 September 2022	Building on actions taken from Phase 1

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		contribute to the inclusive design.			
13.	Planning application submitted	To provide the planning authorities and members of the public with considerable detail on the level of inclusion targeted for the development. The planning application documents are available to the public and provide a wide variety of information on inclusion and consultation. Feedback into the design from engagement can also be evidenced at this stage.	Planning submission contained inclusion details in a variety of areas, including: Design and Access statement (A planning requirement) Access statement, particularly focusing on inclusion aspects. Landscape and Public Realm Strategy with outcomes of consultations. Statement of Community Involvement.	7 October 2022	Planning approval was gain on 2 March 2023. The provision of substantial information on inclusion helped foster good relations and promote equality of opportunity. It also demonstrated that the developers are open to positive comments, listen and respond.
14.	Meeting with Dementia Friendly Design representative	To ensure that people with dementia, their families, carers, and friends are included in the designs. Creating a dementia friendly city and development is essential to inclusion,	Consulted with [redacted] (Kirklees Dementia Strategic Partnership Manager) on dementia friendly design. Kirklees has adopted a design guide on Dementia for the City, produced in consultation with the centre of excellence at Stirling University. The design team and access consultants were aware of the design guide and had incorporated the recommendations into the design. The meeting further enhanced the inclusion of design detail and local preferences and requirements.	14 February 2023	The design team and access consultants were aware of the design guide and had incorporated the recommendations into the design.
15.	Liaison with newly formed Kirklees Disability Network	To ensure that all representative groups and individuals are involved in the	Presentation, with model to Kirklees Disability Network, followed by Q+A	7 March 2023	Fostered good relations with the new network and wider community. Ensured

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		creation of an accessible development.			that local and regional variations are included in the design.
16.	Access Consultant involvement	To create a development with exceeds current inclusion regulations and guidance and responds to local and regional needs.	Access Consultants Jane Simpson Access and Access Included have been involved in the project from the outset. Design details have been adjusted to be as accessible as possible, exceeding regulations and predicting demographic change where possible. The latest guidance, including neurodiversity, accessible vehicle charging, toilets and a range of other aspects have been adopted in the design by the design team.	Throughout	Ensured that the development is as inclusive as possible.
17.	Pegasus Planning Consultants involvement, post planning submission	Comment received from a member of the public in response to the planning application. A press article entitled 'Does the Kirklees Cultural Heart 'wilfully exclude disabled people'? emerged.	Analysis of comment made to the press, with description of inclusion consideration throughout the project, detailed outcomes, and design solutions. Report issued.	April 2023	Quick response to counter unexpected criticism and provide evidence to the contrary ensured public opinion was not swayed by incorrect information.

B) Equalities Impact – Action Planning

Equalities Impact - ACTION PLAN			Complete this section when you have actually carried out some actions		
REF.No [from section A]	**What actions are you going to do as a result of carrying out your consultation?**	**What do you think these actions will achieve? Will they mitigate any adverse impact on protected**	**What did you actually do?**	**When did you do this?**	**What was the actual outcome? Have you mitigated any negative impact? Have you ensured good relations**

		groups? Will they foster good relations between people? Will they promote equality of opportunity?			**exist? Have you promoted equality of opportunity?**
1.	Continue contact with the Diversity and Inclusion Hub.	Further the established contact and foster relationships.	Promoted relationships, increased awareness, enhanced design	March 2022-present	Enhanced inclusive design, identified barriers to inclusion, improved relationships and equality of opportunity.
2.	**Site visit / review of Multi Faith Room examples** Following the initial public consultation we are looking to pursue workshops with targeted groups consisting of parents and carers, older people, young adults, faith groups. A focused workshop for school children.	Faith room requirements vary considerably. Engagement can assist in assessing local and regional design details required, including the provision of an accessible Wudu. Involving people in the design fosters good relations and promotes equality of opportunity.	Suggested meeting and site visit, 4 April 2022. Details of design requirements – one room rather than two, look, size, and feel of space, passed to access consultants and design team for inclusion in later designs.	End of June 2022 TBC	There was no uptake for a further meeting and site visit after the 4 April engagement. Good relations have been created by offering further opportunities and demonstrating an awareness of and willingness to create multi-faith facilities. Further input will be welcomed during the later stages of development, when more design details are available for people to consider.
3.	Continue contact with KC-Partnership Commissioning Manager for Mental Health	Further the established contact and foster relationships.	Promoted relationships, increased awareness, enhanced design	April 2022-present	Enhanced inclusive design, identified barriers to inclusion, improved relationships and equality of opportunity.
4.	A focused workshop for disability groups incorporating the site visit as mentioned above following discussion with the Carers Group	Workshops can elicit a wide variety of information, with an opportunity to understand further detail with a skilled facilitator.	Suggested workshop 4 April 2022. No take up. Design details available passed to design team and access consultant.	End of June 2022 TBC	There was no uptake for a further workshop after the 4 April engagement. Good relations have been created by offering further opportunities and demonstrating an awareness of and willingness to create multi-faith facilities. Further input will be welcomed during the later stages of

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					development, when more design details are available for people to consider.
5.	Changing places toilet visit offer was not taken up – continue to offer visit and details of design of changing places toilet in the development	Further the established contact and foster relationships.	Promoted relationships, increased awareness.	Throughout	Identified barriers to inclusion, improved relationships, and equality of opportunity.
6.	**Public consultation, Phase 1 and 2** Continue public consultation, include comments and desires in the design, involve groups in design and development.	Continue commitment to inclusion issues, draw communities together, identify needs and create inclusive design.	Promoted relationships, increased awareness, enhanced designs.	Throughout	Enhanced inclusive design, identified barriers to inclusion, improved relationships and equality of opportunity.
7.	**Co-design session** Include details in the design, continue contact with participants.	Increase awareness of the design team of lived experience and needs beyond inclusive design technical guidance.	Promoted relationships, increased awareness, enhanced designs.	Throughout	Enhanced inclusive design, identified barriers to inclusion, improved relationships and equality of opportunity.
8.	**Contact with Outlookers, carers group, dementia friendly design representative, Kirklees Disability network, other groups, and individuals.** Continue contact throughout the design, preview, and opening stages.	Increase awareness of the design team of lived experience and needs beyond inclusive design technical guidance.	Promoted relationships, increased awareness, enhanced designs.	Throughout	Enhanced inclusive design, identified barriers to inclusion, improved relationships and equality of opportunity.
9.	**Inclusion of wide variety of information with the Planning application submission.** Ensure that the information is carried forward to the Building Control stage, developing the story of	Increase awareness of the requirement to continually consider inclusion throughout all stages of the development.	Developed knowledge of inclusion with a wider audience. Established a model for development proposals.	Throughout	All impact targets met and enhanced.

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	inclusive design and engagement.				
10.	**Access consultant involvement.** Continual attention to inclusive design issues throughout the project, collating information from consultees and development consultants.	Create a genuinely inclusive development, future proofing the environment for generations to follow.	Created an inclusive environment beyond regulations.	Throughout	All impact targets met and enhanced.
11.	**Media response to negative inclusion commentary, including Pegasus Planning submission to Planning department.** Corrected negative claims on inclusion.	Ensure that the consistent and extensive engagement work and inclusive design detail was valued and explained. Relationships will be fostered by immediate reaction.	Submitted a quick response to claim that Kirklees Cultural Heart excluded disabled people.	April 20223	Consultation groups were made aware of the detail of engagement and inclusion in the design, commitment to further enhancing equality of opportunity.

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C) Environmental Impact – Evidence from Engagement

CONSULTATION WITH KEY STAKEHOLDERS				COMPLETE THIS DETAIL WHEN YOU HAVE DONE YOUR CONSULTATION	
REF No.	**Which key stakeholders have you/are you consulted/ing with?**	**Why have you/are you consulted/ing them (or not?)** and what were you/are you looking to find out?	**How did you/are you planning to consult them?** Date and method of planned consultation	Actual Date of Consultation	**Outcome of consultation** What have you learned? Do you have actions to complete that will help mitigate any unnecessary negative impact on groups? [move to section D if you do]
1	Kirklees planning and development team inc highways	To determine if an EIA was required	Through the issue of a scoping report and meetings	Scoping report was issued on the 6th June 2022	The LPA did not require an EIA to be completed.
2					
3					
4					
5					

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D) Environmental Impact – Action Planning

Environmental Impact - ACTION PLAN			Complete this section when you have actually carried out some actions		
REF.No [from section C]	**What actions are you going to do as a result of carrying out your consultation?**	**What do you think these actions will achieve? Will they mitigate any adverse impact on protected groups? Will they foster good relations between people? Will they promote equality of opportunity?**	**What did you actually do?**	**When did you do this?**	**What was the actual outcome? Have you mitigated any negative impact? Have you ensured good relations exist? Have you promoted equality of opportunity?**
	EIA Screening undertaken with the LPA, the conclusion of which was that an EIA was not required. **Decision made by the project team that in order to propagate a robust decision making process that an EIA would be submitted on a voluntary basis.**	The decision to undertake a voluntary ES was made to ensure a robust approach to decision making, notably on the main environmental effects – highways, air quality, socio-economics and impacts upon cultural heritage assets. This approach will ensure a deeper assessment of environmental effects specific to the scheme and cumulatively (when applicable). Consequently, those interested parties, such as Civic Society and Historic England can become more engaged in the process in the lead up to the submission of the planning and listed building consent applications.	As part of its drafting, the EIA was subject to an EIA Screening and Scoping exercise to ensure a proportionate and appropriate assessment was undertaken. The EIA was then produced on this basis and formed part of the planning application.	January 2022 to December 2022	The EIA was found to be robust and required no amendment, aside from ensuring it captured updates necessitated by revised plans being submitted in response to consultation responses. Continuing dialogue with key consultees, such as Historic England carried through the determination process and established proactive relationships for the future.

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		Notably on cultural heritage and socio-economics, the EIA will allow for a far reaching assessment of the co-located benefits of securing the long term future of listed buildings within the site. This assisted the decision making process, which took into account the views of a wide variety of statutory and non-statutory bodies.			

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KIRKLEES COUNCIL

Kirklees Our Cultural Heart Venue Feasibility

Stage 1 Report by IPW...

June 2025

Basis of Information

It is not possible to guarantee the fulfilment of any estimates or forecasts contained within this report, although they have been conscientiously prepared based on our research and information made available to us at the time of the study.

Neither IPW..., nor the authors, will be held liable to any party for any direct or indirect losses, financial or otherwise, associated with any contents of this report.

We have relied in a number of areas on information provided by the client (and other organisations) and have not undertaken additional independent verification of this data in all cases.



Confidentiality

The contents of this paper are confidential to the parties it was prepared for only (Kirklees Council) and is not to be shared outside these organisations without the express permission of IPW... and Kirklees Council.

Executive Summary



Executive Summary

The Borough of Kirklees (the Council) has developed a vision for the regeneration of Huddersfield Town Centre, known as the Our Cultural Heart (OCH) project, which includes the development of a new venue, alongside new cultural facilities.

The Council has appointed IPW… to advise on the venue development, as part of the Delivery Team with Turner & Townsend (T&T).

IPW… is exploring the future feasibility of a new multi-use venue in Huddersfield Town Centre to support the Council's strategic, cultural, financial and regeneration aspirations. IPW… is undertaking an initial market assessment to identify a recommended venue facility mix/scale.

E.S.1 Project Objectives

The following project objectives were identified at the start of this study:

- Venue to **drive footfall** into Huddersfield Town Centre to maximise the economic benefits, especially in the evening
- Operationally **self-financing** scheme with no long-term subsidy requirement – Council may be prepared to offer initial support/rent free period, depending on scale and facility mix
- **Long-term lease** agreement with commercial operator – preference for a stable national/ international operator with relevant experience
- **Diverse programme** of events which appeals to local market
- **Enhancement of the cultural offer** of Kirklees.

E.S.2 Catchment, Competition and Content

- **Large catchment** around Huddersfield with 30-minute drivetime catchment of c.1.3million and 45-minute drivetime catchment of c.4.2million
- Propensity to consume events in line with the national average. **Propensity to consume theatre content** more than once a month significantly higher (15%) than national average, which suggests strong regional audiences for theatre content
- Huddersfield is located between major urban centres, Leeds, Sheffield, Bradford and Manchester, which results in Huddersfield having an overlap in catchment, with some access to a unique catchment at a 30-minute drivetime but lack of a distinct catchment at a 45-minute drivetime
- Local venues in Kirklees are smaller scale with a limited programme of events which is made up of mainly live music/tribute bands (46%), followed by Musicals (8%), Comedy (7%) and Family shows (6%)
- **Regional market is crowded**, with many of venues of varying capacities, so a new venue in Huddersfield will compete with venues in Leeds, Manchester, Sheffield and Bradford for content and audiences
- Significant **touring content in the region but little comes to Huddersfield** due to lack of appropriate venue. Touring theatre content goes to regional theatres - no venue in Kirklees that can host such events of scale currently
- **Operator and promoter** feedback suggests opportunity for managed multi-use venue with capacity and capability to host touring theatre content
- **Opportunity for a new venue in Huddersfield capable of hosting a large mixed programme of events including entertainment, e-sports, sports (boxing, snooker, darts), weddings, banquets, parties, conferences and exhibitions**
- A larger capacity venue bringing new content would further establish Huddersfield as a cultural heart and **improve opportunity for all of the existing venues** by bringing a new potential audience to the town

- Further analysis around **potential event programme and commercial arrangements would be undertaken in Stage 2** of the feasibility.

E.S.3 Wider Infrastructure

- **Good local transport links** and connections to regional hubs, with supporting services to encourage visitors
- **2 current hotels** in the immediate vicinity (10-min walk time from the site), accounting for over c.75 bedrooms and new George Hotel under construction with 108 rooms
- Visitors have potential to utilise the existing car park provision, however, this assumption needs to be tested further with a **car parking study** which would feed into the Stage 2 report

E.S.4 Consultations

- Soft Market Testing at this stage identified **three significant operators** with a genuine interest, with others suggesting they wouldn't consider until nearer a commissioning date
- A number of operators would be interested in operating the **venue subject to a fly tower and staging** being included in the design. This approach **might add 30-50 events** to the annual calendar and bring significant footfall and audiences to the Town
- Further **operators are looking for venues to complement their wider portfolio** of facilities in the UK and the North.
- A number of operators have commented that a venue proposition would potentially be **more attractive to the market if the phasing of the venue could be brought forward**
- There was some **nervousness from existing venues** that a new venue in Huddersfield with theatrical capability might impact on their own outputs. However, it might be anticipated that a complementary facility to existing ones would encourage a new audience to the smaller and existing facilities. A new venue would enable audiences to view Huddersfield as destination for more theatre content benefiting all providers
- Parties have raised some **concern regarding comedy content** which could play in a number of venues in the town. A purpose-built multi use facility would maximise the content in the Town for all content types.

E.S.5 Venue Recommendation

Following the market assessment exercise and the soft market testing conducted with the selected venue operators, we would recommend the following be tested at Stage 2:

- **A venue with capacity of 1,200 in a fully seated mode and a maximum capacity of 2,000 using a standing floor and seated balcony which would best meet the OCH project objectives**
- Design should also accommodate the **ability to split the main auditorium into two spaces** so that a smaller capacity secondary space can be created
- A **fully flexible venue** with the ability to accommodate as many event types as possible including entertainment, theatrical content, business events, public events, sports and e-sports
- The inclusion of a **Fly Tower and staging** (subject to further testing with potential operators in Stage 2)
- Potential to be equipped to be able to run an **immersive attraction** based upon Council's own IP and dovetail with the Museum and Gallery programmes
- An **exterior digital advertising and content screen**.

E.S.7 Next Steps …

- A **Multi Use Venue with a theatre capability has the potential to be successful in Huddersfield** due to commercial demand from venue operators and a catchment with a strong propensity for theatre content
- There is a window of opportunity to test the recommended venue mix and identify and quantify the programming and content **opportunity to bring regional audiences to Huddersfield who might not have otherwise come to the town**
- IPW… believe that market conditions mean this is **potentially a better opportunity than the Council's previous investigation**; while there are challenges to be considered around catchment and competition this is a proposition where content is the driving feature when considering the three C's of content, catchment and competition
- IPW… recommends that the Council should **test the venue opportunity further during Stage 2** to confirm the market interest with detailed venue specific discussions
- Stage 2 works would include developing the **venue planning, siting, venue costing, programming and business plan which will establish the throughputs for the venue and financial viability.** This analysis will provide the necessary robust and rounded analysis of the commercial and strategic implications of the recommended venue
- We will then have **clarity on whether this window of opportunity is deliverable and whether this is a major opportunity** as part of Our Cultural Heart to change perceptions of Huddersfield and bring in people and improve the economics of the scheme and the region.





Contents

1. Introduction
2. Project Background & Objectives
3. Catchment, Competition & Content
4. Wider Infrastructure Review
5. Consultations
6. Market Assessment Findings
7. Venue Recommendation
8. Summary & Next Steps

Appendix A – Regional Entertainment Venues

1. Introduction



1.1 Introduction

The Borough of Kirklees (the Council) has developed a vision for the regeneration of Huddersfield Town Centre and has a multi-year capital budget plan of c.£262 million for new cultural facilities known as the Our Cultural Heart (OCH) project, which includes the development of a new venue.

The Council has appointed IPW… to advise on the venue development, as part of the Delivery Team with Turner & Townsend (T&T), who are undertaking the project management and cost management for the scheme.

IPW… is exploring the future feasibility of a new multi-purpose venue in Huddersfield Town Centre to support the Council's strategic, cultural, financial and regeneration aspirations. IPW… is undertaking an initial market assessment to identify a recommended venue facility mix/scale.

1.2 Structure of this report

The structure of this report is as followed:

- Section 2: Background & Context
- Section 3: Catchment, Competition & Content
- Section 4: Wider Infrastructure Review
- Section 5: Consultations
- Section 6: Market Assessment Findings
- Section 7: Venue Recommendation
- Section 8: Summary & Next Steps.



2. Project Background & Objectives



2.1 Project Background

The OCH project is a key Council led regeneration scheme in Huddersfield Town Centre. OCH is the flagship development within the Council's wider Huddersfield Blueprint which provides a 10-year vision to create a thriving, modern-day town centre. The OCH project is set to transform Huddersfield Town Centre into a vibrant cultural hub of leisure, heritage, music and arts.

The role of town centres is changing nationally, with residents and visitors seeking more experiences through leisure and culture. OCH is seen as a catalyst for change in the town centre, by bringing together Kirklees Council's current cultural services into a holistic experience. The project has the potential to enhance the existing leisure and cultural offer available and attract more residents and visitors to the town centre, especially in the evening.

The Council has approved plans for the first phase of OCH, which is now currently on-site and under construction. This first phase of the masterplan concentrates on the major refurbishment of the historic former Queensgate Market building, which will be transformed into a vibrant new food hall. A brand-new library will be incorporated within the existing east wing of the same building, with a new glass-fronted extension to the north. This phase is due for completion in summer 2026.

Both the food hall and new library will directly feed out to a new public square, with enough space for 3,000 visitors. The square will bring people together and suit a range of community and cultural events – from food festivals and live music to outdoor cinema and theatre.

The second phase of OCH will see a new art gallery and museum brought together under one roof in the striking Grade II Listed building off Princess Alexandra Walk, which previously housed the town's library. Funding has been approved for this phase, with a construction starting by Spring 2026 and the new facilities are due to open by Q1 2029.

Figure 2.1 Nighttime aerial view of OCH site



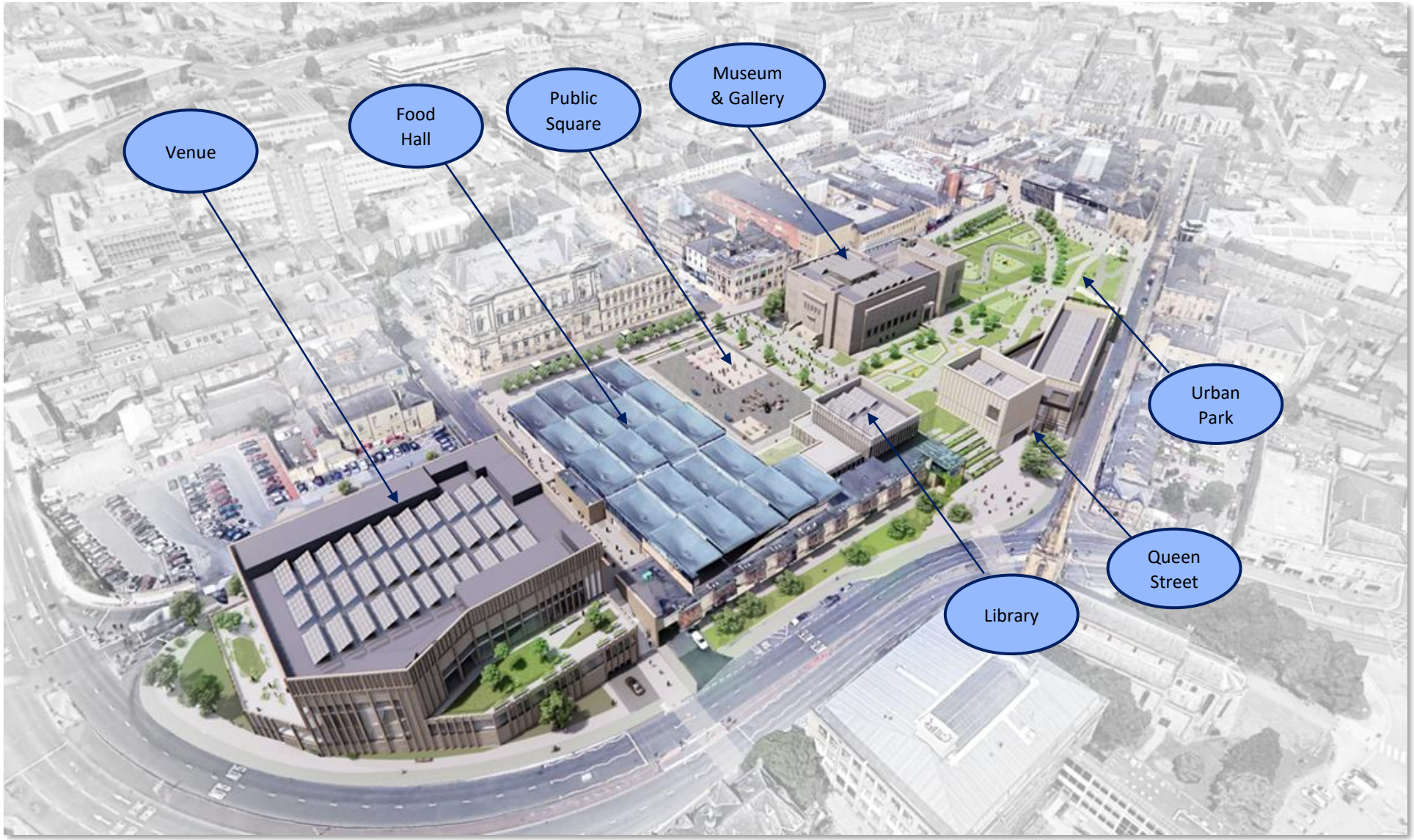
The new venue will be developed as part of the subsequent phases of the OCH project. There is a long-term ambition for Huddersfield to deliver a brand-new live entertainment venue. A vacant parcel of land to the south of the site, formerly occupied by a municipal car park before its demolition in 2021, has been earmarked for the new venue. The capacity of the venue and the scale of the facility mix is still to be determined.

The subsequent phases will also consider various enabling development options on a plot of land on the edge of the site adjacent to Queen Street, with options including educational facilities, residential, a hotel or offices. It will also see the development of an urban park and public realm which will act as a key link between the scheme and the wider town centre.

Figure 2.2 overleaf outlines the masterplan for OCH project and shows the adjacencies of the various elements of the scheme.



Figure 2.2 OCH Masterplan



2.2 Council Objectives

A number of project objectives were developed by the Programme Board during the last iteration of this study. We re-engaged with the Council to understand if their strategic priorities were still the same or if they had changed over time.

Following conversations with the Council, the objectives identified were:

- Venue to drive footfall into Huddersfield town centre to maximise the economic benefits, especially in the evening
- Operationally self-financing scheme with no long-term subsidy requirement – Council may be prepared to offer initial support / rent free period, depending on scale and facility mix
- Long-term lease agreement with commercial operator – preference for a stable national/ international operator with relevant experience
- Diverse programme of events which appeals to local market
- Enhancement of the cultural offer of Kirklees.

There were no specific timeframes proposed for the development to be either commenced or completed.



3. Catchment, Competition & Content



3.1 Industry Dynamics – what drives demand?

As part of identifying demand for entertainment events in Kirklees, it is important to consider the key interrelated factors that impact upon the demand for an entertainment venue. These are:

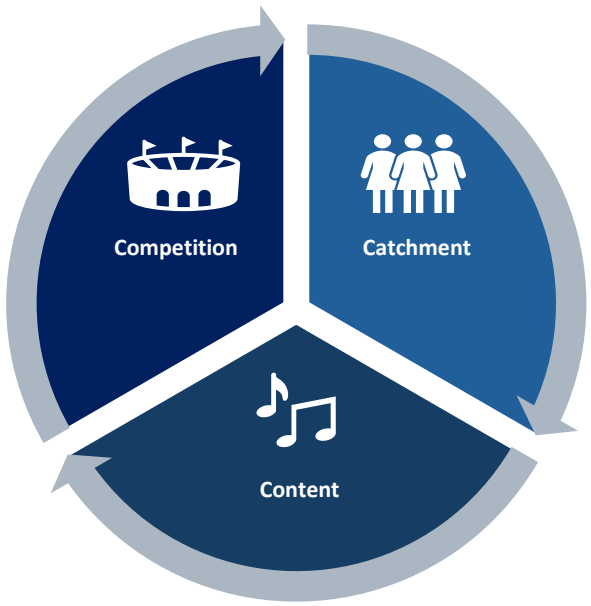
- ***Catchment:*** a venue requires a strong population catchment in order to maximise ticket sales and attendances. This is both in terms of the number of people that can access the venue within an acceptable travel time and also the propensity for people to attend and pay for events/ tickets.

  The strength of the business and academic communities is also typically very important from a business events perspective.
- ***Content:*** a venue requires 'content', i.e. events to fill its annual calendar, which could include theatre shows, concerts, conferences and exhibitions, banquets etc. As a general rule the more content a venue can secure, the more commercially successful it will be (subject to the quality and commercial appeal of the events) and the more indirect benefits it can drive for the city and its people and businesses.
- ***Competition:*** competition for a venue applies to both the catchment and the content.

  Example of content competition: there are a finite number of shows, musicians etc. touring in one year, playing a certain number of concerts in a geographical area (which could be Europe-wide or across the UK).

The venues the shows/ artists choose to play is heavily dependent on the promoter view of the potential to maximise ticket sales. Factors affecting promoters' choice of venue are shown below right.

Figure 3.1 The Dynamics of Demand



Key factors affecting venue choices

- Facilities
- Location
- Cost
- Ambience & Genre
- Configuration
- Reputation & Quality
- Capacity

3.2 Catchment

The catchment range varies depending on the scale of the venue in question (and the overall geography of specific locations) with larger venues typically attracting audiences from greater distances. The view that catchment size increases by seat number/ capacity is also supported by data reported by the Audience Agency.

Based on our experiences nationally, we would typically assume that mid-scale entertainment venues (i.e. below a large arena level) in a location like Huddersfield would draw the vast majority of their audiences from within a 45-minute drivetime (subject to scale and product), though some events will attract audiences from beyond this.

On this basis, we have analysed the catchment demographics for 30 and 45-minute drivetimes from Queensgate Market (Huddersfield), compared with the national average (England).

Figures 3.2 and 3.3 graphically demonstrate the scale of the 30 and 45-minute drivetime catchments.

The **30-minute drivetime catchment for Huddersfield is c.1.3million**, with the adult population (15+) being c.1.1million.

Looking further afield, the **45-minute drivetime catchment is c.4.2million** with the adult population at c.3.4million.

Both the 30-minute and 45-minute drivetime catchments are considered to be large in relation to mid-scale venues.

Figure 3.2 30-minute drivetime population from Queensgate Market

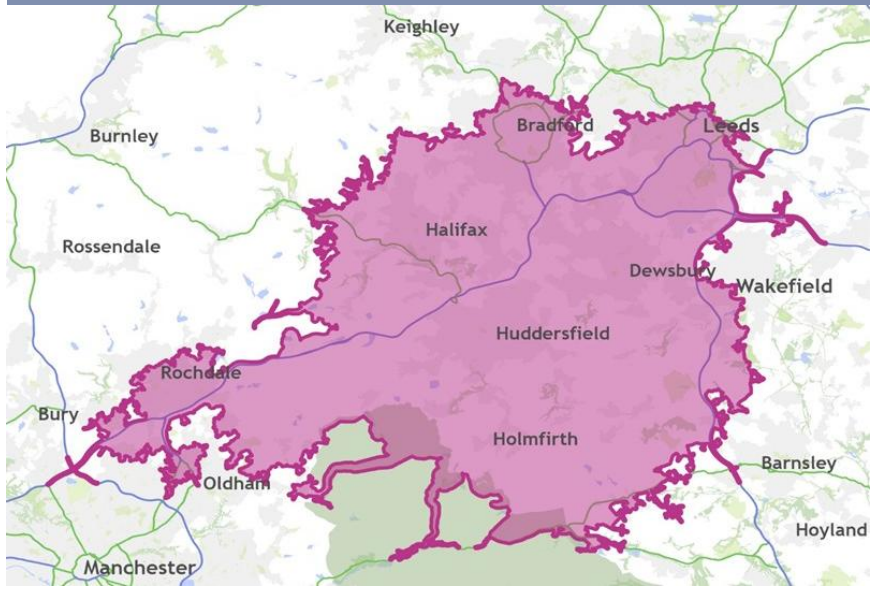
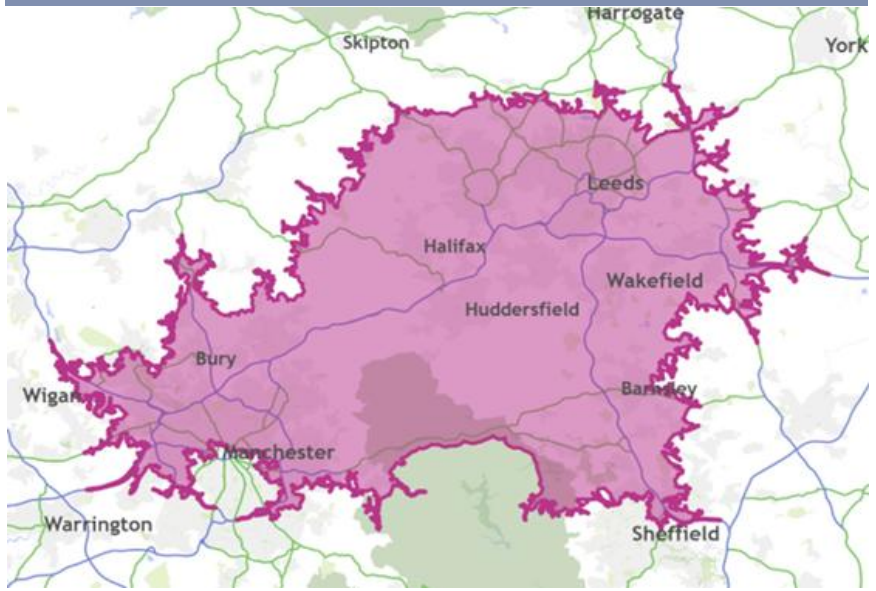


Figure 3.3 45-minute drivetime population from Queensgate Market



Source: Audience Agency

3.2.1 Distinct Catchment

Huddersfield is located between two major urban centres, Leeds and Manchester, each with its own established market and venue infrastructure. As a result, while Huddersfield benefits from a theoretically large 30-minute and 45-minute catchment, there is overlap with neighbouring markets. Figure 3.4 and Figure 3.5 illustrate the extent of this overlap.

At the 30-minute drivetime, Huddersfield's catchment area (highlighted in red) overlaps with about half of Leeds 30-minute catchment, and to a much lesser extent, has some minor overlaps with the fringes of Manchester's 30-minute catchment.

At the 45-minute drivetime, Huddersfield's catchment has significant overlaps with the catchments of both Leeds and Manchester, with little distinct audience reach at this level.

This indicates that **Huddersfield has some access to a unique catchment at a 30-minute drivetime but lack of distinct catchment at a 45-minute drivetime**.

It is also relevant to note that Bradford Live, a new 3,800-capacity venue scheduled to open later this year (2025) in Bradford, will further increase regional competition for both audiences and touring product.

Huddersfield's geographic location offers access to a large regional audience but a new venue in Huddersfield will operate within a competitive market, drawing from the same audience base as existing venues in Leeds, Manchester, Bradford and to a lesser extent Sheffield.

Figure 3.4 30-minute drivetime Overlapping Catchments

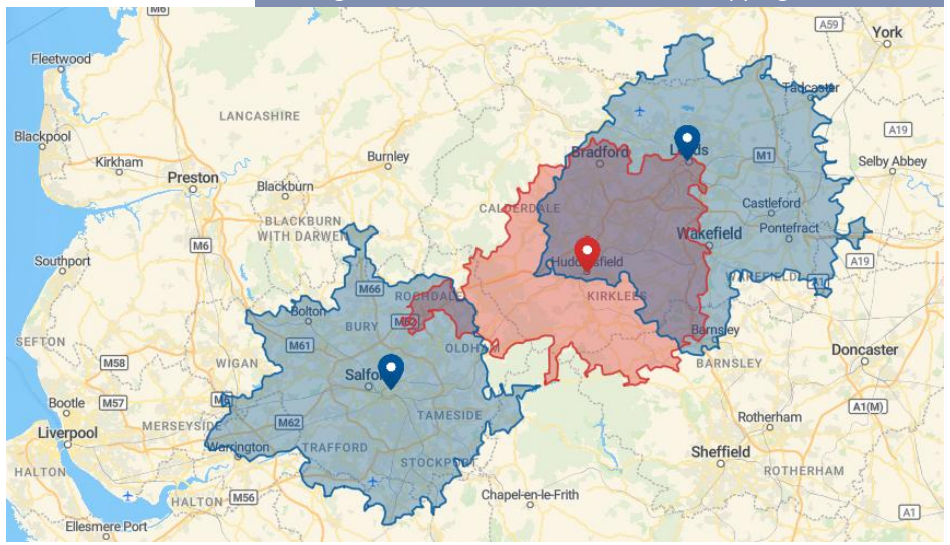
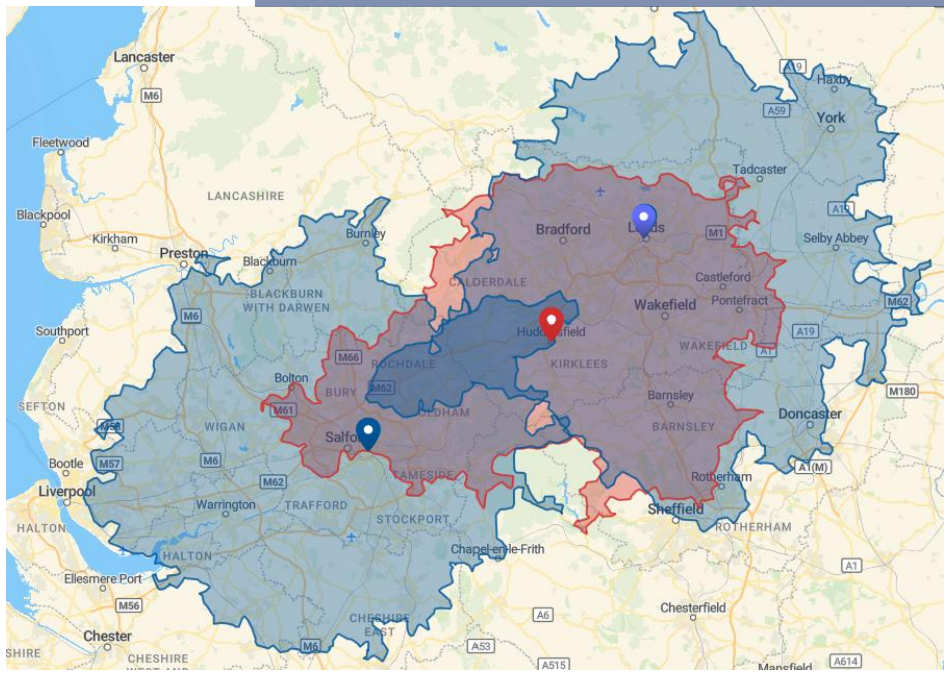


Figure 3.5 45-minute drivetime Overlapping Catchments



3.2.2 Propensity to attend arts events

The Audience Agency Area Profile reports contain data on resident populations and provide insight into the demographics and cultural engagement of specific areas, using information derived from Experian population data, BMRB International's Target Group Index Survey and the Census. The report gives an overview of the size and demographic characteristics of the population and, the number of adults with a propensity to attend live music performance, go to the theatre or visit other cultural events.

Tables 3.1 and 3.2 shows the attendance levels for each event activity within the 30-minute and 45-minute catchments, compared to the attendance level for that activity in England.

At 30 and 45-minute drivetime catchments, the **population exhibits similar levels of cultural and arts engagement to the national average**. The most popular forms of live entertainment, relative to the national average are:

- ***Theatre: 44%*** **-** *3% lower than the national average*
- ***Popular/ rock concert: 43%*** **-** *2% higher than the national average*
- ***Musicals: 37%*** **-** *in line with the national average*

The index figures show whether each activity is over or underrepresented in the catchment area compared to the UK population. Any index findings within +10/-10 of the national level (100) are considered in line with the national average.

When considering the index, at 30-minutes whilst all the activities are considered in line with the national average, **popular/rock concerts (106), comedy (103) and contemporary dance (102) are the strongest performers**. This also correlates when looking at the 45-minute catchment.

For both catchments, **attending the theatre at least once a month is shown to be above the national average (+15%)**, with the remainder of the activities, including those that a new venue would likely programme are in line with the national average. This demonstrates the population has a desire to engage in culture and the arts which will benefit the new venue.

Table 3.1 Propensity to consume arts events, 30-min drivetime

Attended in past 12 months	30-minute drivetime from HD1 2UJ		England		Index	
	Count	%	Count	%	Value	Indicator
Art galleries	342,795	30%	15,242,106	32%	94	-6
Art gallery once a month or more	54,075	5%	2,031,488	4%	112	12
Ballet	215,772	19%	9,405,562	20%	96	-4
Classical concerts	215,540	19%	9,816,203	21%	92	-8
Comedy shows	350,875	31%	14,339,371	30%	103	3
Contemporary dance	207,731	18%	8,560,889	18%	102	2
Jazz concerts	188,034	17%	8,741,088	18%	90	-10
Musicals	420,946	37%	17,707,746	37%	100	0
Opera	193,892	17%	8,627,076	18%	94	-6
Plays	387,034	34%	17,140,027	36%	95	-5
Popular/rock concert	491,854	43%	19,529,917	41%	106	6
Theatre	494,419	44%	22,261,617	47%	93	-7
Theatre once a month or more	119,730	11%	4,369,407	9%	115	15
Adults 15+ estimate 2023	**1,132,043**		**47,494,117**			

Table 3.2 Propensity to consume arts events, 45-min drivetime

Attended in past 12 months	45-minute drivetime from HD1 2UJ		England		Index	
	Count	%	Count	%	Value	Indicator
Art galleries	1,042,037	30%	15,242,106	32%	94	-6
Art gallery once a month or more	148,555	4%	2,031,488	4%	100	0
Ballet	670,026	19%	9,405,562	20%	97	-3
Classical concerts	670,208	19%	9,816,203	21%	93	-7
Comedy shows	1,061,408	31%	14,339,371	30%	101	1
Contemporary dance	630,038	18%	8,560,889	18%	101	1
Jazz concerts	591,617	17%	8,741,088	18%	93	-7
Musicals	1,271,265	37%	17,707,746	37%	98	-2
Opera	602,693	17%	8,627,076	18%	96	-4
Plays	1,184,323	34%	17,140,027	36%	95	-5
Popular/rock concert	1,475,518	43%	19,529,917	41%	103	3
Theatre	1,514,973	44%	22,261,617	47%	93	-7
Theatre once a month or more	358,291	10%	4,369,407	9%	112	12
Adults 15+ estimate 2023	**3,471,121**		**47,494,117**			

Source: Audience Agency

3.2.3 Audience Spectrum

Audience Spectrum is a population profiling tool which describes attendance, participation and engagement with the arts, museums and heritage, as well as behaviours, attitudes and preferences towards such organisations. Figure 3.6 outlines key findings from the audience spectrum profile

The most prominent Audience Spectrum segments in the 30-minute drivetime catchment area are Trips & Treats, Frontline Families and Kaleidoscope Creativity - 53% of adults in the catchment area belong to one of these three segments, compared with 38% of adults in the base population.

- **Trips & Treats 22% (medium engagement):** Suburban households, often with children, whose cultural activities usually are part of a day out or treat
- **Frontline Families 17% (low engagement):** Harder pressed suburban and semi-urban households for whom arts and culture plays a small role
- **Kaleidoscope Creativity 14% (low engagement):** Urban and culturally diverse, their arts and cultural activity happens in their community and outside

The target area contains **lower 'high engagement'** people (11% compared to 26%) and a **greater number of 'low engagement'** people (48% compared to 33%). The percentage of 'medium engagement' people is in line with the base area (41%).

This shows that 52% of the target area has a medium to high level of engagement, below that of the base area (67%), whilst also having a greater percentage of lower engagement people than the base area. Overall, the **level of participation and engagement is slightly lower when compared to the national average**. These figures are also consistent with findings from the 45-minute catchment.

Figure 3.6 30-minute catchment Audience Spectrum segment breakdown



Source: Audience Agency

3.3 Entertainment Competition

For most leisure and cultural facilities, competition can be defined within a specific geographical area. However, this is not strictly the case for performance venues. Whilst attendance will be impacted by geography (accessibility, catchment size) and the competing facilities within a defined radius, securing product and events is subject to local, regional and national competition.

3.3.1 Local Competition

There are a number of small-scale local entertainment venues in Huddersfield and the surrounding areas. Local competitor venues were identified as venues within the Borough of Kirklees and that have a capacity of at least 400. Each venue is detailed in Table 3.3 and located Figure 3.7. It should be noted there are multiple smaller venues (<400 capacity) that contribute to the live entertainment landscape in Kirklees, but venues of this scale won't compete for content due to their size.

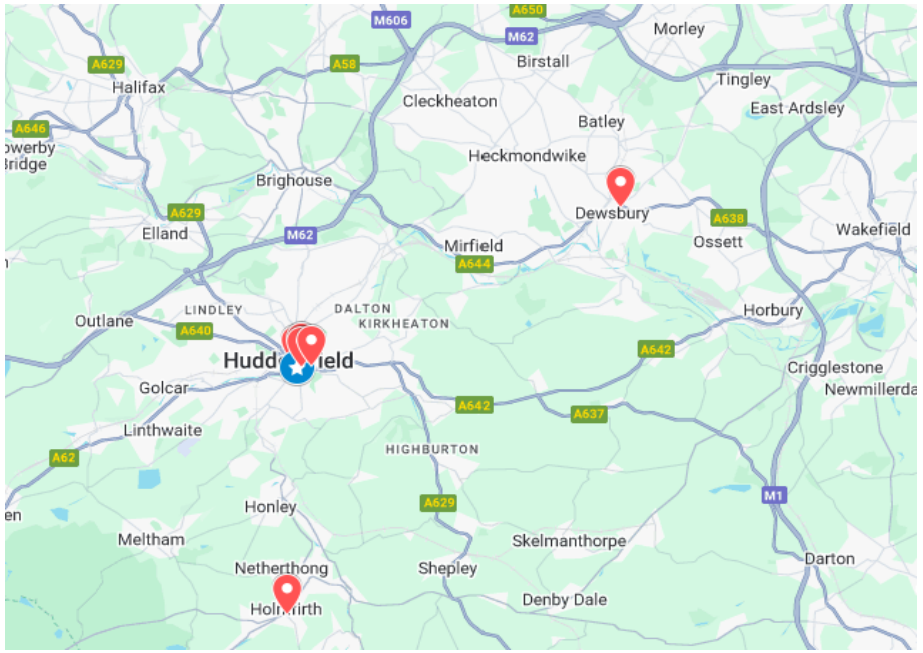
Huddersfield Town Hall is an orchestra hall which holds up to 1,100 people and is the largest entertainment facility in Huddersfield. It hosts events ranging from comedy, live music, weddings, conferences, award ceremonies and multi-cultural events. Despite its size and location (adjacent to Queensgate Market), this venue is not seen as a direct competitor to a new venue in Huddersfield. The Town Hall is considered not fit for purpose for large standing concerts and the venue has other limitations. It is seen as a facility that can support the entertainment infrastructure in Huddersfield alongside a new multi-purpose venue.

The Lawrence Batley Theatre is a small-scale theatre based in the centre of Huddersfield, housed in a Grade II* listed building, that presents a wide-ranging year-round programme of in-house and visiting productions from drama and contemporary dance to circus and pantomime attracting over 70,000 people a year. The building has three performance spaces – the Main House seating 460 people, the Cellar Theatre with up to 120 seats, and the Attic Theatre, with up to 60 seats. This is another venue that is adjacent to the OCH site and is considered to be an important facility which will support the wider entertainment infrastructure of Huddersfield and should be considered as part of the Cultural Heart project.

Table 3.3 Local Competitor Venues

Local Venues	Drivetime from site (mins)	Capacity
Huddersfield Town Hall	1	1,100
Lawrence Batley Theatre	2	460
St Pauls Hall, Huddersfield University	2	400
Smile Bar and Venue	5	750
Holmfirth Picturedome	15	650
Dewsbury Town Hall	22	700

Figure 3.7 Local Competitor Venues



St Paul's Hall is located within Huddersfield University's campus and is a converted Georgian church built in 1829 that now provides a 400-capacity venue for a range events. In November, each year the Hall also hosts many events as part of the Huddersfield Contemporary Music Festival.

Smile Bar and Venue opened its doors in 2022 as a new live music option in Huddersfield. Online radio station Smile Radio are based at the site aiming to provide a platform to upcoming and unsigned artists. The performance hall has a capacity of 750 for standing live music events. The current programme features predominately tribute acts and other live concerts.

The Holmfirth Picturedome is an entertainment venue with a capacity of around 650. The venue hosts live music and touring bands, DJ nights and stand-up comedy.

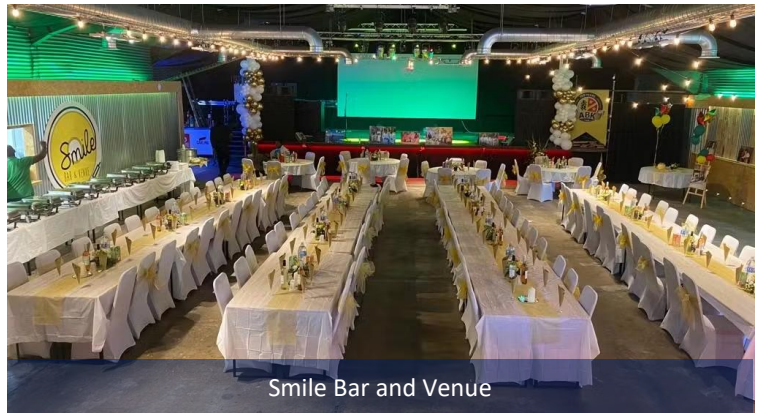
Dewsbury Town Hall is a Victorian town hall that stands in front of the old marketplace in the centre of Dewsbury. The venue contains a 700-seat concert hall, function and meeting rooms, and an old court room. It is a Grade II* listed building.



Huddersfield Town Hall



Lawrence Batley Theatre



Smile Bar and Venue

3.3.2 Regional Competition

Alongside the local competition, there are also numerous mid to large-scale venues in West Yorkshire and the wider region, with venues concentrated mainly around Leeds and Manchester.

27 key regional entertainment venues, with a capacity of over 750, have been identified. These are summarised below and further detailed in Appendix A.

As shown in Table 3.4, of the 27 venues identified, 14 are in Manchester with the remainder split between Huddersfield's West Yorkshire neighbours Leeds (7), Bradford (3), Halifax (2) and Wakefield (1).

Just over half of the venues identified land in the 1,000 – 2,000 capacity range, with seven falling in the mid-scale venue range (2,000 – 5,000). From the venues identified as having 5,000+ capacity, three are large scale arenas (two in Manchester and one in Leeds), one is a multi-purpose venue in Manchester (Aviva Studios) and the other one is a large outdoor events space in Halifax (Piece Hall).

Figure 3.8 shows the split between different types of venues that exist within the region. There are seven theatres with a capacity of over 750, which attract touring content, with their programme also supplemented by other events and acts.

The closest regional theatre to the OCH site is the Alhambra Theatre (1,400) in Bradford and Victoria Theatre (1,875) in Halifax. There are also two theatres in Leeds, the Leeds Grand Theatre (1,466) and Leeds Playhouse (1,100), and three theatres in Manchester, Palace Theatre (2,000), Opera House (1,900) and Lyric Theatre (1,700).

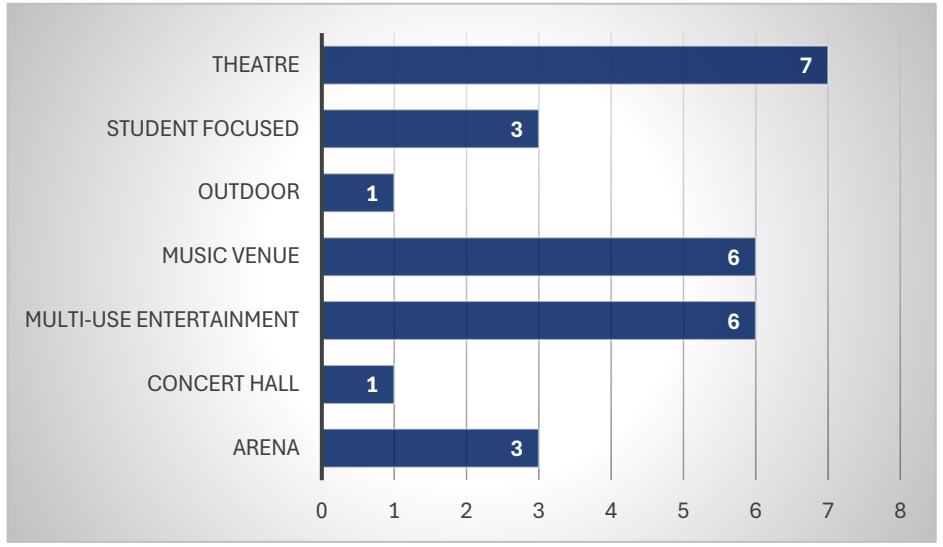
There are six dedicated music venues in the region, with the closest ones located in Leeds, O2 Academy Leeds (2,300), and Wakefield, Venue 23 (850). The remaining four are located further afield in Manchester, O2 Victoria Warehouse (3,500), O2 Ritz (1,500), Manchester Academy (2,600) and New Century Hall (1,300).

There are also six multi-use entertainment venues in the region which have a diverse programme of events. There are two in Bradford, including the highly anticipated Bradford Live (3,800), which will open in 2025 and St Georges Hall (1,500). There is one in Leeds, Leeds Town Hall (1,500) and three in Manchester, Aviva Studios (5,000), O2 Apollo (3,500) and the Albert Hall (1,900).

Table 3.4 Regional Competitor Venues by Location and Capacity

Location	Capacity			
	750 - 999	1,000 - 1,999	2,000 - 4,999	5,000+
Bradford	-	2	1	-
Halifax	-	1	-	1
Leeds	-	5	1	1
Manchester	-	6	5	3
Wakefield	1	-	-	-
Total	**1**	**14**	**7**	**5**

Figure 3.8 Regional Venue Types



Some of the key competing facilities identified as part of our audit are listed in Table 3.5 and further detailed below.

Bradford Live is the redeveloped former Odeon and is set to open later this year (2025). The 3,800 capacity multi-purpose venue is expected to attract 300,000 visitors each year and will host a calendar of 200+ music, comedy and family entertainment events as well as providing conference, meeting and banqueting spaces, including a 500-capacity ballroom.

St George's Hall (1,500) is a Grade II* listed Victorian building. It is one of the oldest concert halls still in use in the United Kingdom. The venue was refurbished in 2019 and hosts one of the UKs longest running Orchestral Seasons, with the Hallé described as the venue's 'resident' orchestra. St George's Hall also hosts other entertainment events, children's shows and amateur productions.

The Alhambra Theatre (1,400) is another entertainment venue in Bradford and hosts a range of events including international dance, musicals, drama and pantos. It is also a member of The Dance Consortium, a group of theatres who work together to bring the best in international dance to the UK.

Victoria Theatre was originally built in 1901 as a concert hall before being converted for theatrical use in 1960. The theatre has the capability to host a wide range of events creating a varied programme. Its maximum capacity is 1,875 standing whilst also able to accommodate a seated capacity of 1,512. The Grade II listed building has undergone several renovations to bring it up to modern audience and performance standards.

Leeds Grand Theatre is a theatre and opera house and was opened in 1878. The theatre is a large-scale receiving house and hosts touring productions of West End and Broadway musicals and plays as well as comedy and music events. The theatre is also home to Opera North and is regularly visited by Northern Ballet.

The Grade I listed Leeds Town Hall (1,200), is currently undergoing £17million refurbishment. When it reopens, it will continue to host live music, comedy, film screenings, other live entertainment and many of the city's renowned arts and cultural events.

Leeds Playhouse (1,100) is one of the leading producing theatres in the UK. Since 1970 the playhouse has strived to support and develop new theatre productions, developing a high-quality programme for its audience.

Table 3.5 Regional Competitor Venues

City	Venue	Type	Capacity	Operator	Drivetime from OCH
Bradford	Bradford Live	Multi-use	3,800	Trafalgar Entertainment	25
Bradford	St George's Hall	Multi-use	1,500	Bradford Theatres	28
Bradford	Alhambra Theatre	Theatre	1,400	Bradford Theatres	25
Halifax	Victoria Theatre	Theatre	1,500	Calderdale Council	24
Leeds	Leeds Town Hall	Multi-use	1,200	Leeds City Council	25
Leeds	Leeds Grand Theatre	Theatre	1,466	Leeds Heritage Theatres	30
Leeds	Leeds Playhouse	Theatre	1,100	Leeds Theatre Trust	40
Manchester	O2 Apollo	Multi-use	3,500	Academy Music Group	54
Manchester	Palace Theatre	Theatre	2,000	ATG	57
Manchester	Opera House	Theatre	1,900	ATG	54
Manchester	Lyric Theatre	Theatre	1,700	Lowry Arts Centre	50
Manchester	Albert Hall	Multi-use	1,900	Trof	55

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The O2 Apollo Manchester is a Grade II listed Art Deco concert venue. The venue has both seated and standing areas, with a capacity of 3,500 for standing events and 2,693 for seated events. The venue hosts a wide range of popular music-based concerts, comedy shows and other events throughout the year.

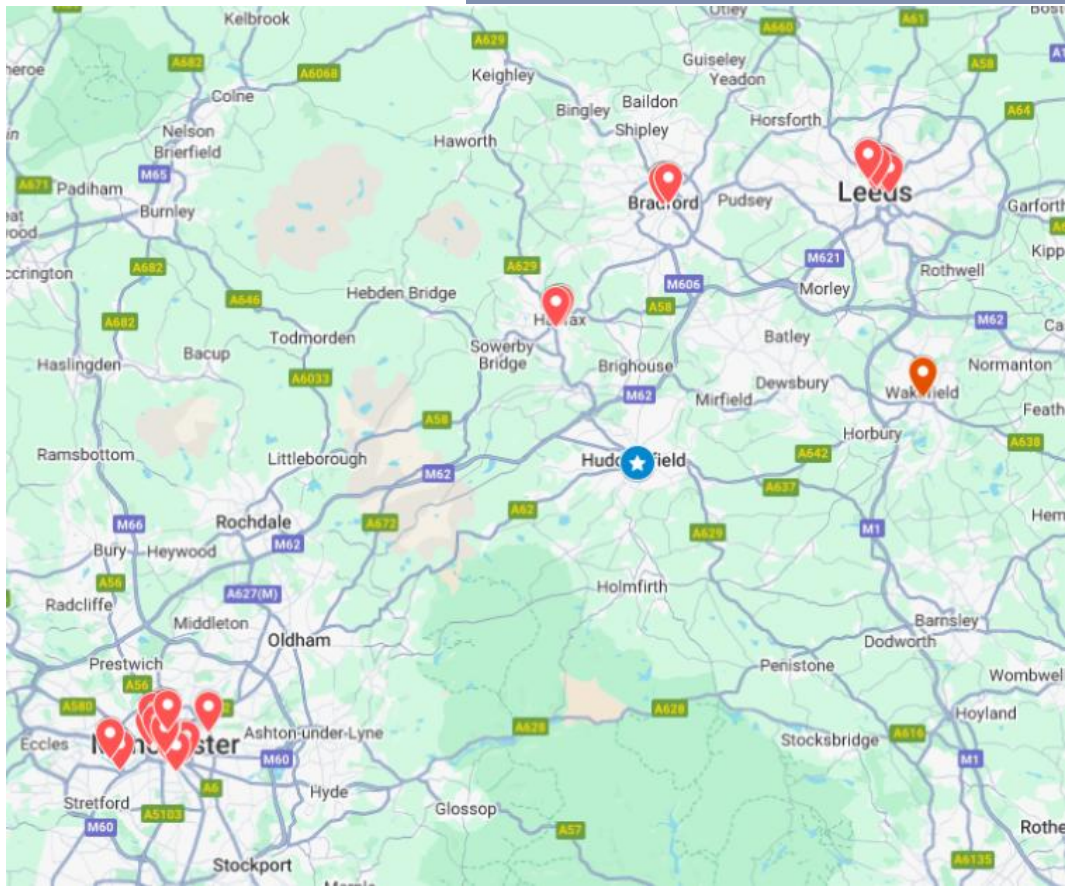
Palace Theatre Manchester opened in 1891 has a capacity of 2,000 seats. It is owned and operated by ATG, along with its sister venue the Manchester Opera House, which has a capacity of 1,900. Both theatres are prominent venues in Manchester for live entertainment, hosting a wide variety of musicals, opera, plays, comedy, dance, concerts, Christmas pantomime and children's shows. They are both some of the largest and well-equipped theatres outside London. They have hosted numerous landmark productions over the years and continue to be a receiving house for major touring product.

The Lyric Theatre at The Lowry in Salford is a prominent venue for live performances, events, and conferences, offering a capacity of up to 1,700 guests. The theatre hosts touring plays, comedy, musical events and Opera North. It features a large stage, modern design, and state-of-the-art facilities, including tiered seating and adaptable lighting. The Lyric Theatre is a central part of The Lowry, a popular theatre and gallery complex in Manchester.

Manchester's Albert Hall has a maximum capacity of 1,900. The Grade II listed former chapel in central Manchester was closed for 40 years before being reopened in 2013. It now hosts a variety of music and club events whilst also having the capacity to host corporate and other business events.

It should also be noted that there is a new venue under construction in Doncaster as part of the Hex complex at Yorkshire Wildlife Park. The Hex complex is a conferencing, retail and social hub that includes a 104-room hotel. Construction of the venue is currently paused whilst an operator for the 2,500-capacity venue is sourced. The selected operator will input into the final design and take over once the venue is operational. It is expected that the venue will become operational in late 2026.

Figure 3.9 Regional Competitor Venues



3.4 Business Events Competition

When assessing the options for development of an entertainment or multi-use venue, it is important to consider whether there is any potential to generate additional usage of the facilities through business events. The additional usage, revenue and economic benefits of attracting these events, can be achieved at a comparatively low cost when making specific adjustments to a multipurpose venue to ensure it is attractive to business events.

The term business events covers a wide range of events, including conventions, association conferences, conferences and corporate events, meetings, exhibitions, and trade shows, consumer exhibitions and incentive programmes.



3.4.1 Local Competition

There are a number of existing business event facilities in close proximity of the new proposed venue. The key competing local business event venues are detailed in Table 3.5 and illustrated in Figure 3.10, which is colour coded to show the different types of venue being used, which includes conference and exhibition facilities, hotels, sports venues, educational sites, unique and other venues.

Thers are two facilities with dedicated conference and/or exhibition space within a 15-minute drivetime of the OCH site, with a range of differing capacities.

The largest in terms of maximum capacity is Cathedral House with a c.1,250sqm exhibition space capable of hosting 1,500 delegates, with five other spaces catering for capacities from 40 to 160. Bertie's is capable of hosting 250 delegates in its crystal ballroom space.

Currently there are two hotels within a 15-minute drivetime of Huddersfield which provide conferencing facilities. The largest of these is the 4* Cedar Court Hotel, which offers a range of conferencing facilities in 15 versatile spaces, capable of hosting up to 400 delegates. Holiday Inn Leeds Brighouse is a 3* Hotel, providing conferencing facilities for up to 200 delegates and is suitable for meetings, product launches and corporate events.

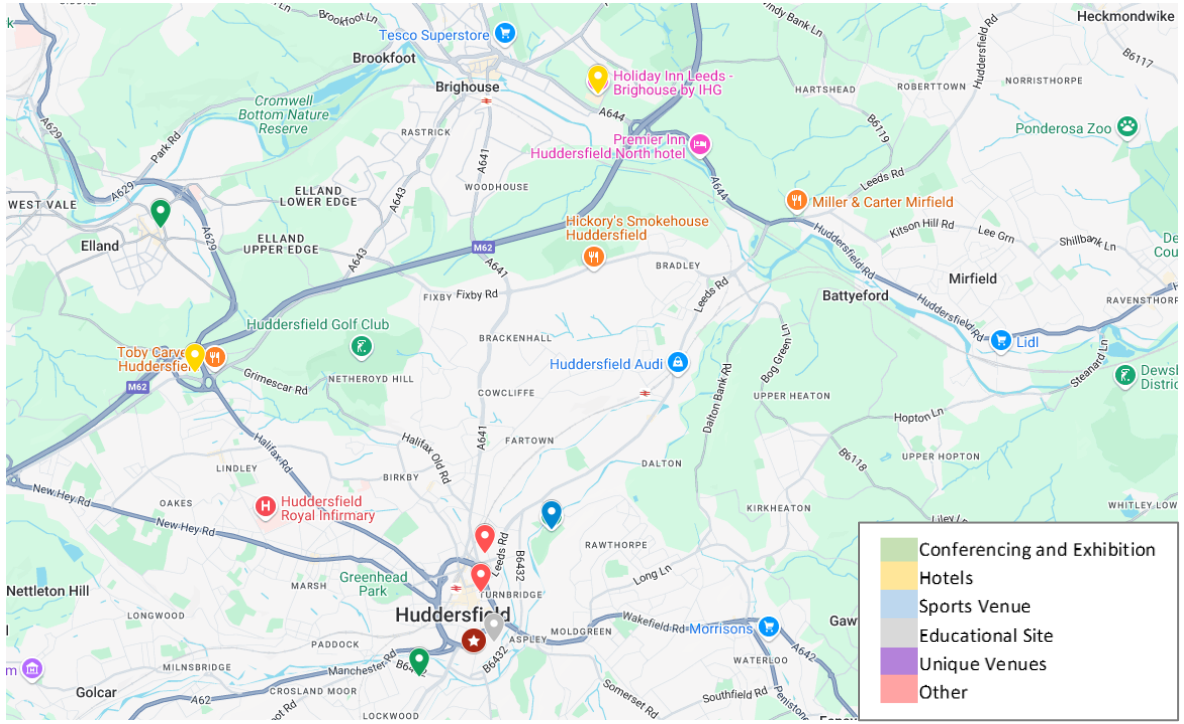
Conference and exhibition spaces are also provided by Huddersfield University and John Smith's Stadium. Located under a mile from the site, Huddersfield University offers a range of meeting rooms and lecture theatres, providing conferencing facilities for up to 280 delegates. John Smith's stadium is home to Huddersfield's professional sports teams, Huddersfield Town Football Club and Huddersfield Giants Rugby League. The stadium has multiple space the largest of which can host up to 750 guests.

Other venues with meeting facilities include Huddersfield Mission (180 delegates) and spaces at the Hudawi Centre (200 delegates).

Table 3.5 Local Competitor Business Event Venues

Local Venues	Type of venue	Drivetime from site (mins)	Capacity (max)
University of Huddersfield	Educational	3	280
Hudawi Centre	Other	4	200
Huddersfield Mission	Other	5	180
Cathedral House	Conference and exhibition	5	1,500
John Smith's Stadium	Sports	9	750
Cedar Court Hotel	Hotel	12	400
Bertie's	Conference and exhibition	15	250
Holiday Inn Leeds Brighouse	Hotel	15	200

Figure 3.10 Local Competitor Business Event Venues



3.4.2 Regional Competition

Due to the nature of the conference and events market, not only will a new multipurpose venue in OCH compete locally for events but also regionally and to an extent nationally. This section summarises the existing regional business event facilities in the market presented in Figure 3.11.

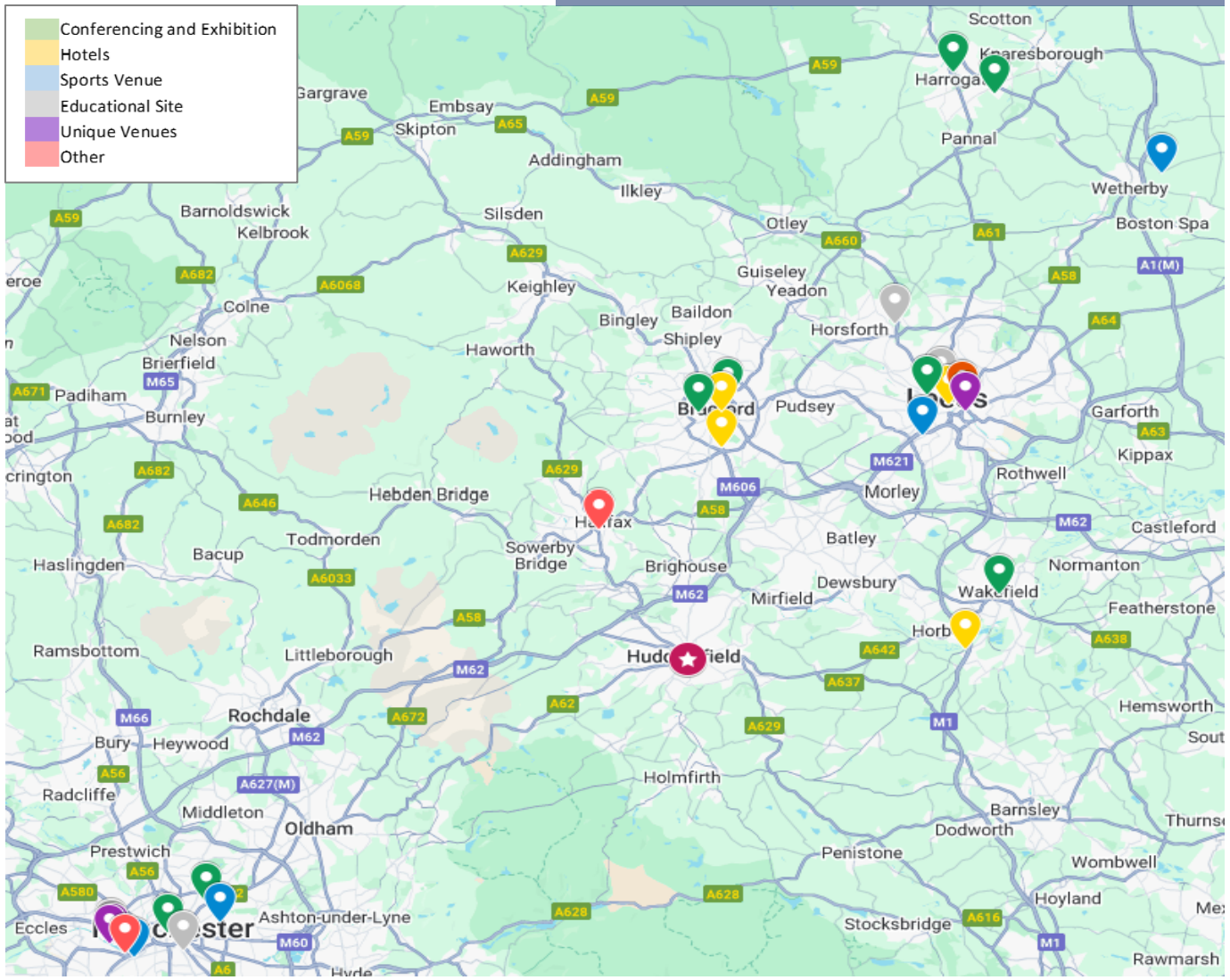
For the regional audit, only venues with a capacity of more than 500 delegates, within a 60-minute drivetime of OCH were considered. The regional venues have also been categorised in the same way as the local competitor venues.

There are nine purpose-built conference and exhibition centres facilities. The largest of these is Manchester Central, capable of hosting 10,000 delegate though the venue is primarily used for large exhibitions. Yorkshire Events Centre in Harrogate has the next largest capacity (3,000) though again is primarily intended for exhibition style events. Harrogate convention centre is more versatile, capable of accommodate up to 2,000 delegates. It has 10 event halls and provides 16,500m2 of exhibition space. However, Harrogate is c.1-hour drivetime from Huddersfield and is arguably less well connected. Other smaller dedicated conference facilities are available in Manchester, Leeds, Bradford and Wakefield.

There are four hotels (3* to 4*) captured in the audit that offer conferencing facilities, with seating capacities ranging from 500-800 delegates. The hotel providing the largest delegate capacity is the Cedar Court Hotel Bradford (800), with The Bradford Hotel (700) and The Queens (Leeds), and Cedar Court Hotel Wakefield (500) also providing business event spaces.

Often sports venues offer various hospitality spaces to be used on non-matchdays as conference and exhibition facilities. There are three professional football stadiums in the region that offer such facilities in addition to one cricket stadium and one horse racing course.

Figure 3.11 Regional Competitor Business Events Venues



The largest sports venue conferencing offer is provided by Leeds United Football Club at Elland Road (1,600), followed by the Etihad Stadium (1,500) of Manchester City Football Club and Old Trafford of Manchester United Football Club (1,200). The other offerings is at the Emirates Old Trafford (1,200), home to Lancashire County Cricket Club and Wetherby Racecourse (500).

There are four educational sites providing conferencing facilities. The largest conferencing offers are provided by the University of Manchester campus and the University of Salford campus, both can host up to 1,000 delegates. Then there is the University of Leeds campus (850) and finally the Grammar School at Leeds (600).

Also in the region are more unique venues that provide a conferencing offer. These venues are not traditional sites for business events but due to their distinctive offers, they will attract audiences. In the region there are three such sites captured by the audit including the Royal Armouries and its adjacent New Dock Hall has the flexibility to host up to 2,500 delegates. The Lowry Salford Quays, can hold up to 1,700 delegates in its large array of flexible event spaces, whilst the Imperial war Museum North has capacity for 500 delegates.

There are three other venues within the region that offer conferencing facilities in some capacity, though their primary purpose is to host live entertainment events. The largest of these other venues is the Victoria Warehouse which is adjacent to the O2 academy music venue of the same name. It has the flexibility to host up to 5,000 delegates by combining its array of spaces and is capable of hosting all types of corporate events. Next, the Victoria Theatre in Halifax can host 1,500 delegates whilst the Leeds Playhouse has capacity for 750.


Manchester Central


Harrogate Convention Centre


Cedar Court Hotel, Bradford

3.5 Content

A venue requires 'content', i.e. events to fill its annual calendar – typically concerts and entertainment shows in the case of large arenas; meetings, conferences and exhibitions in the case of confex facilities and, in the new wave of Mid-Scale Venues, a mixed programme of events. Theatres typically also host a more varied programme of different types of entertainment and community events.

We have assessed the current content provision of the local venues in Kirklees as well as some regional venues that could compete with a new venue in Kirklees given their size and typical programming.

St Paul's Hall has been excluded from the local venues list given there is not a readily available programme of events, but it's noted that it predominantly hosts student concerts as well as several events during the annual Huddersfield Contemporary Music Festival every November.

Table 3.6 shows the different venues analysed for this content assessment. When assessing the content provision, we have considered all events that were on sale online for each venue from March 2025 through to the end of the year.

Table 3.6 Comparable Venues for Content Analysis

Local		
Venue	**Drivetime from site (mins)**	**Capacity**
Huddersfield Town Hall	1	1,100
Lawrence Batley Theatre	2	460
Smile Bar & Venue	5	750
Holmfirth Picturedrome	15	650
Dewsbury Town Hall	22	700
Regional		
Venue	**Drivetime from site (mins)**	**Capacity**
Alhambra Bradford	25	1,400
St Georges Hall, Bradford	28	1,500
Victoria Theatre, Halifax	24	1,875
Leeds Grand Theatre, Leeds	30	1,466
O2 Apollo, Manchester	54	3,500

3.5.1 Content Analysis

Figure 3.12 provides an overview of the current content provided by the local venues in Kirklees from March through to the end of 2025.

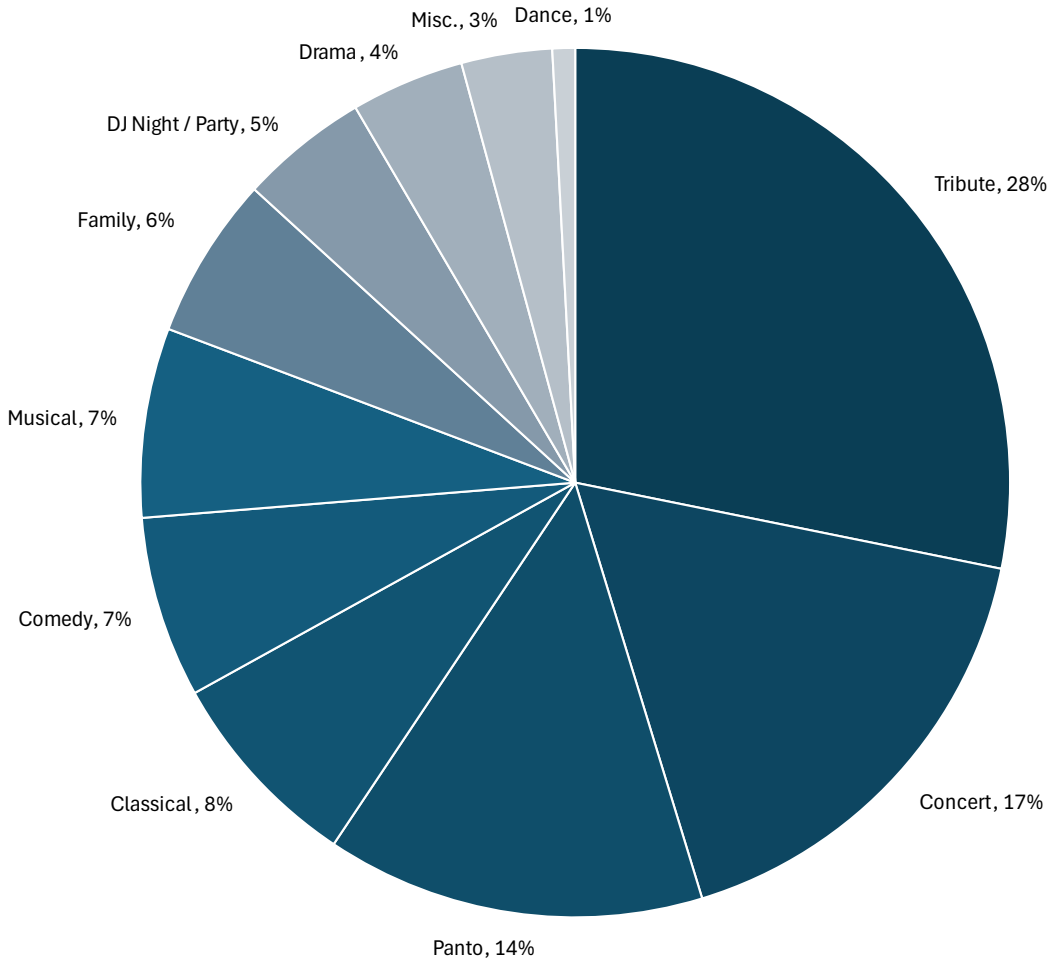
It's clear that live music events make up the majority of content in the local venues in Kirklees. In particular, tribute bands account for 28% of total content with other concerts next at 17%. Excluding the Lawrence Batley Theatre's Christmas pantomime run, Classical (8%), Comedy (7%) and Musicals (7%) are the next most prominent genre of live entertainment put on by venues in Kirklees.

Table 3.7 overleaf shows that The Lawrence Batley Theatre (LBT) puts on the most events and also has the most variation in terms of different genres. This in part will be down to the venue having three different spaces available which increases the amount of, and types of, content it can host, highlighting the potential importance of the facility mix and flexibility of a new venue in Huddersfield to maximise the amount of content it can attract. The LBT is the current major provider of comedy shows in Kirklees.

Huddersfield Town Hall (58) and Dewsbury Town Hall (21) have the fewest number of events remaining this year. Both these venues play a prominent role during the annual Kirklees Concert Season that runs between September and June, and thus classical music events account for the majority of their programming.

The Holmfirth Picturedome is the preeminent venue in Kirklees for live music. Currently 81 shows are on offer for the rest of 2025, and these are exclusively made up of Concerts (46%), Tribute shows (43%) and DJ events (11%). The venue however is 15 minutes from the centre of Huddersfield and its capacity will also limit the types of artists that it could attract.

Figure 3.12 Spread of Content in Local Kirklees Venues



Smile Bar's top genre of content is live music, though unlike the Picturedome, Tribute shows account for a large majority of this at 73% of the total programming. The venue also occasionally hosts family and other miscellaneous events such as special guest quizzes.

Analysing the local content offer, there would appear to be a gap in the market for a larger venue in Huddersfield capable of hosting a large number of events encompassing multiple genres.

A larger venue would be able to capture touring content that currently wouldn't play existing venues in Kirklees. Comedy and higher-profile concerts would especially benefit given the restrictions of current local venues.

Table 3.7 Content Comparison in Local Kirklees Venues

Genre	Lawrence Batley Theatre		Holmfirth Picturedome		Smile Bar & Venue		Dewsbury Town Hall		Huddersfield Town Hall	
Classical	2	1%	-	-	-	-	6	29%	23	40%
Comedy	19	13%	-	-	1	2%	3	14%	2	3%
Concert	8	5%	37	46%	4	6%	3	14%	12	21%
Dance	3	2%	-	-	-	-	-	-	-	-
DJ Night / Party	2	1%	9	11%	4	6%	3	14%	-	-
Drama	16	11%	-	-	-	-	1	5%	-	-
Family	17	11%	-	-	5	8%	-	-	1	2%
Misc.	7	4%	-	-	4	6%	-	-	3	5%
Musical	22	14%	-	-	-	-	4	19%	1	2%
Panto	52	34%	-	-	-	-	-	-	-	-
Tribute	5	3%	35	43%	48	73%	1	5%	16	28%
	153		**81**		**66**		**21**		**58**	

3.5.2 Regional Content

Based on our analysis of the local content offer, we've decided to focus on regional venues suited to hosting a varied schedule of events and that are a step up in terms of capacity from what is currently available in Kirklees. These venues will provide a good picture of the types of content that a new, similar scale of venue in Huddersfield could seek to attract.

Table 3.8 shows a breakdown of the content on show in the chosen five regional comparator venues.

3.5.3 Theatre Venues

Bradford's Alhambra Theatre and the Leeds Grand Theatre have the highest number events. Whilst predominantly theatrical productions (drama, musicals and pantomime) other event genres including comedy, live music and dance contribute to their content mix, adding more diversity to their respective programmes.

A new venue in Huddersfield could benefit from having the capability to host touring theatre shows that are too large for the LBT though other theatres like the Alhambra and Leeds Grand are in close-proximity and are both in larger markets with already established audiences and reputations.

With this in mind, an events programme akin to that of the Victoria Theatre in Halifax might be more successful, still attracting theatrical shows but supplementing these with more comedy, concerts and other events.

Including the aforementioned venues, in the wider region there are seven theatres in the 1,000 – 2,000 capacity range.

Table 3.8 Content Comparison of Regional Venues

Genre	Alhambra Theatre		Victoria Theatre		Leeds Grand Theatre		St. George's Hall		O2 Apollo	
Classical	-	-	2	2%	1	1%	6	10%	3	4%
Comedy	-	-	18	17%	11	6%	3	5%	10	15%
Concert	2	1%	14	13%	6	3%	17	27%	45	67%
Dance	15	8%	3	3%	25	14%	3	5%	-	-
DJ Night / Party	-	-	-	-	-	-	3	5%	-	-
Drama	22	12%	1	1%	47	26%	3	5%	-	-
Family	9	5%	6	6%	-	-	2	3%	4	6%
Misc.	5	3%	9	9%	10	6%	11	18%	4	6%
Musical	89	47%	14	13%	77	43%	1	2%	-	-
Panto	43	23%	26	25%	-	-	-	-	-	-
Tribute	4	2%	11	11%	1	1%	13	21%	1	1%
	189		**104**		**178**		**62**		**67**	

3.5.4 Multi-Use and Music Venues

St George's Hall is an example of multi-use venue that doesn't specialise in theatrical content. It predominantly hosts concerts (27%) and tribute shows (21%) with miscellaneous events such as live podcasts and talk shows accounting for the next largest event genre. The Hall hosts all genres of events, with the exception of a pantomime.

The O2 Apollo has 67 shows currently on offer for the remainder of 2025. It is largely focused on hosting live music concerts accounting for 45 shows. The remaining events consist of 10 comedy shows, four family shows, four miscellaneous events, three classical and a tribute show.

The Apollo is the largest venue compared here at 3,500 capacity which will influence some of the content that it receives, especially when it comes to concerts. However, there are an abundance of other regional venues whose sole focus is live music.

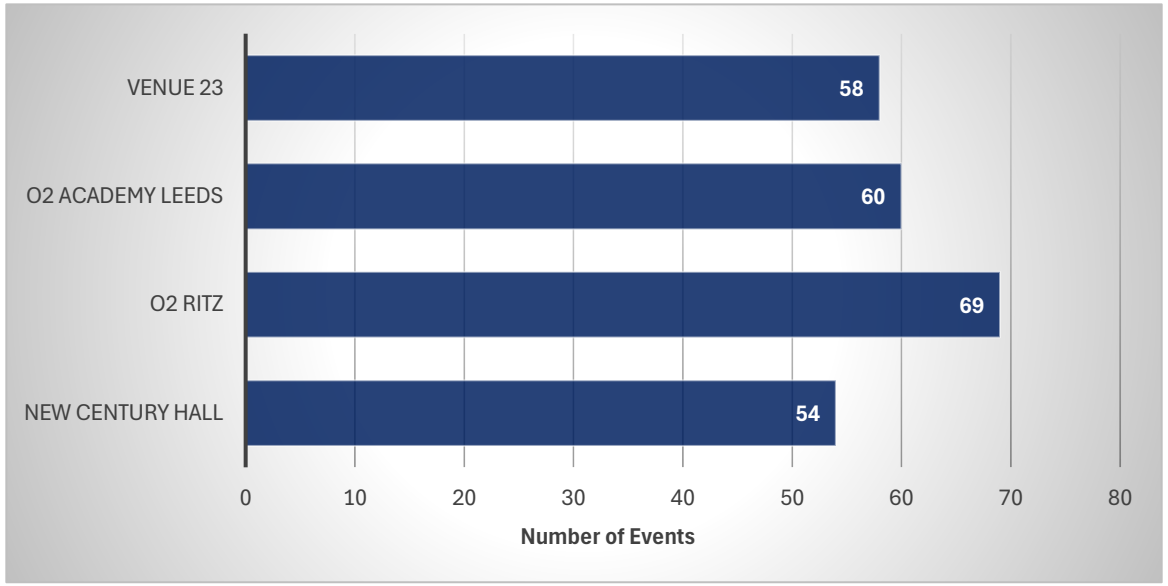
These venues include Venue 23 in Wakefield (850), O2 Academy Leeds (2,300) and in Manchester there is the O2 Ritz 1,500 and New Century Hall (1,300). These venues are more comparable to a new venue in Huddersfield from a capacity perspective than the O2 Apollo or O2 Victoria Warehouse which are both 3,500 capacity.

On average for these venues there are 60 shows currently on sale in 2025 consisting almost exclusively of concerts, tribute shows and DJ/ Club Nights. This shows there is an abundance of live music acts touring that could play Huddersfield provided there is a suitable venue to play. The number of shows in these venues is displayed in figure 3.14.

Table 3.8 Content Comparison of Regional Venues

Genre	Alhambra Theatre		Victoria Theatre		Leeds Grand Theatre		St. George's Hall		O2 Apollo	
Classical	-	-	2	2%	1	1%	6	10%	3	4%
Comedy	-	-	18	17%	11	6%	3	5%	10	15%
Concert	2	1%	14	13%	6	3%	17	27%	45	67%
Dance	15	8%	3	3%	25	14%	3	5%	-	-
DJ Night / Party	-	-	-	-	-	-	3	5%	-	-
Drama	22	12%	1	1%	47	26%	3	5%	-	-
Family	9	5%	6	6%	-	-	2	3%	4	6%
Misc.	5	3%	9	9%	10	6%	11	18%	4	6%
Musical	89	47%	14	13%	77	43%	1	2%	-	-
Panto	43	23%	26	25%	-	-	-	-	-	-
Tribute	4	2%	11	11%	1	1%	13	21%	1	1%
	189		**104**		**178**		**62**		**67**	

Figure 3.14 Number of events at Regional Live Music Venues



As part of our analysis, we have also considered the type of touring acts and events that are currently playing the regional venues, and that Kirklees currently misses out on. Table 3.9 shows events which toured Leeds, Bradford and Manchester but did not visit Huddersfield.

Table 3.9 shows that of the two or more of the acts playing regional venues, only one has played a night in Kirklees - Chris McCausland at Huddersfield Town Hall. Five other acts play one of the regional venues plus a show in Kirklees; four are tribute acts as well as a comedy show.

The table shows that Kirklees is missing out on three touring comedy shows and one touring concert. These are the types of act that could play in Huddersfield should there be a suitable venue. The other venues these acts are playing are larger than what is currently available in Kirklees, and although Huddersfield Town Hall is over 1,000 capacity, it is not considered as fit for purpose for large standing concerts.

Kirklees also misses out on touring theatrical content going to the regional theatre venues. A new venue could tap into this market providing it had the technical/ design capability to do so.

Though Manchester, Leeds and Bradford are more primary markets than Kirklees, if there is sufficient and excess demand, then artists and promoters could look to play an additional night.

A new premier venue in Huddersfield would hope to host these types of major touring acts, specifically comedy and concerts, whilst having the flexibility to host other event genres and possibly theatrical shows dependent on the design, facility mix and operator aspirations.

Attracting more high-profile events, would shift the local content offer away from tribute shows, creating more diversity for local residents. A larger capacity venue would also reduce the competition for content between a new venue and the existing venues, providing a complementary offer to the borough's arts and culture scene and allowing the other local venues to operate with minimal interference. It is not uncommon for a range of venues, in scale and type, to coexist and thrive in the same town.

Appendix B outlines two case studies for venues of similar capacity and market position.

Table 3.9 Touring Events

Event	Genre	Alhambra Theatre	O2 Apollo	Leeds Grand	St George's Hall	Victoria Theatre	Kirklees
Chris McCausland	Comedy			✓	✓		Huddersfield Town Hall
Dara O'Brien	Comedy			✓		✓	
Jason Manford	Comedy			✓	✓	✓	
Mo Gilligan	Comedy		✓				Huddersfield Town Hall
Paul Chowdhry	Comedy		✓		✓		
Matt Goss	Concert		✓	✓			
Cirque: Reimagined	Misc.	✓		✓		✓	
Calamity Jane	Theatre	✓		✓			
Chitty Chitty Bang Bang	Theatre	✓				✓	
Matilda	Theatre	✓					
Miss Saigon	Theatre			✓			
Six	Theatre	✓		✓			
The Book of Mormon	Theatre	✓		✓			
Illegal Eagles	Tribute				✓		Huddersfield Town Hall
Luke Combs UK	Tribute					✓	Smile Bar
Rob Lamberti: Perfectly George	Tribute					✓	Smile Bar
TaylorMania	Tribute				✓	✓	Huddersfield Town Hall

3.6 Catchment, Competition and Content Summary

Having considered the key interrelated factors that will impact upon the demand for a new venue in Huddersfield, we would conclude the following:

- Large catchment around Huddersfield with 30-minute drivetime catchment of c.1.3million and 45-minute drivetime catchment of c.4.2million
- Propensity to consume events in line with the national average but propensity to consume theatre content more than once a month significantly higher (15%) than national average, which suggests strong regional audiences for theatre content
- Huddersfield is located between the major urban centres Leeds, Manchester, Bradford and Sheffield which results in Huddersfield having an overlap in catchment, with some access to a unique catchment at a 30-minute drivetime but lack of a distinct catchment at a 45-minute drivetime
- Local venues in Kirklees are smaller scale with a limited programme of events which is made up of mainly live music/tribute bands (46%), followed by Musicals (8%), Comedy (7%) and Family shows (6%)
- Regional market is crowded, with lots of venues of varying capacities, so a new venue in Huddersfield will compete with venues in Leeds, Manchester, Sheffield and Bradford for content and audiences
- Lots of major touring content in the region but currently very little comes to Huddersfield, which also misses out on touring theatrical content which goes to the regional theatre venues – no venue in Kirklees can currently host such events
- Opportunity for a new premier venue in Huddersfield capable of hosting a large number of events with a varied programme encompassing multiple genres
- With the right facility mix and offer, a new venue in Huddersfield would be able to capture more major touring content that currently wouldn't play existing venues in Kirklees – if there is sufficient and excess demand, then artists and promoters could look to play an additional night
- A new venue would be capable of attracting more higher-profile comedy events and concerts, which would especially benefit given the restrictions of current local venues. It could also tap into more touring theatrical content, given market demand, providing it had the technical/ design capability to do so.
- The venue will also have the flexibility to host other event types including e-sports, sports (boxing, snooker, darts), weddings, banquets, parties and more
- Attracting more high-profile events would shift the local content offer away from tribute acts, creating more diversity for residents and drawing in audiences to Huddersfield
- A larger capacity venue would reduce the competition for content between a new venue and the existing local venues, providing a complementary offer to the borough's arts and culture scene and allowing the other local venues to operate with minimal interference
- Further detailed analysis around potential event programme for a new venue in Huddersfield to be undertaken in Stage 2 of this study.

4. Wider Infrastructure Review



4.1 Wider Infrastructure Review

When developing a new entertainment venue in a town, it is crucial to consider the town's wider infrastructure, as these factors significantly impact the venue's success and overall visitor experience.

Efficient transport infrastructure, including public transport, roads, and parking facilities, ensures that guests can easily access the venue, attracting a wider audience from both local and distant areas.

Adequate hotels and accommodations are essential for visitors travelling from outside the town, encouraging overnight stays that boost the local economy.

Additionally, business event supporting services, such as destination management/ marketing and convention bureaus enhance the venue's appeal for corporate events, concerts, and exhibitions, increasing its revenue potential.

By carefully planning these elements, the entertainment venue can thrive as a popular and sustainable destination, benefiting both the local community and the economy.

These elements are explored further in Figure 4.1 overleaf.



Figure 4.1 Wider Infrastructure Review

Transport



Rail
- TransPennine Express and Northern operate regular train form Huddersfield
- More than 100 stations can be reached in less than an hour
- There are four trains per hour to Leeds with 5 trains an hour running west from Huddersfield to Manchester
- Plans for improved connectivity for the region in the future

Drivetimes
- Approx 25 minutes to Bradford
- Approx 30 minutes to Leeds
- Approx 50 minutes to Manchester
- Approx 55 minutes to Sheffield

Car Parking
- Over 2,300 spaces across various council owned car parks and on-street locations in Huddersfield
- Additional private car parking available including 650 spaces at Kingsgate Shopping Centre

Hotels/ Accommodation



Hotels
- Two current hotels in the immediate vicinity (10-min walk time from the site), accounting for over c.75 bedrooms
- At five-minute drivetime from the site there are 7 hotels accounting for over 300 bedrooms
- 4* - One hotel, accounting for approx. 25 rooms
- 3* - Six hotels, accounting for approx. 285 rooms
- Huddersfield's iconic George Hotel is undergoing renovation works and is set to become a Radisson Red hotel with 108 rooms
- More variety of hotels with varying ratings to accommodate both business and leisure events at 15-minutes drivetime from the site

Supporting Service Functions



West Yorkshire Local Visitor Economy Partnership (LVEP)
- Part of Visit England's national portfolio of LVEP's and are recognised as the official body for the region's visitor economy
- The LVEP encourages partnership across all West Yorkshire destinations including Kirklees, providing strong local leadership and governance with a vision of adding value and delivering exciting projects to engage and attract visitors whilst supporting the region's tourism sector

West Yorkshire Destination Management Plan (DMP)
- Developed by West Yorkshire LVEP, the DMP establishes frameworks to better the regions visitor economy
- It sets out their ambition to increase the awareness and appeal of the region as a destination, develop product and places, and collaborate to grow its £5.77 billion visitor economy
- A new venue in Kirklees can help achieve these goals with the hosting of events (entertainment and business) cited in the DMP as fundamental to the visitor economy

4.2 Car Parking

There are two primary considerations in relation to the provision of car parking for entertainment venues:

- Planning obligations in terms of minimum number of parking spaces required based on the type and scale of development
- Sufficient car parking spaces within walking distance to cater for the likely parking demand generated by events

Based on our experience of other projects, including operator survey data on car trips and occupancy, and assumptions adopted for Planning Applications, we would apply the following parameters to determine likely traffic generation for each of the venue scales. Assume that for a maximum capacity event, c.75% of people will travel by car and there is an average occupancy per car of 2.5 people. These figures result in the car parking requirement set out in Table 4.1.

It should be noted that not all events that take place at the venue would serve the maximum capacity with only a few shows per year hitting this mark. Visitors could utilise the existing car park provision, however, this assumption needs to be further tested with a car parking study.

Table 4.1 Likely level of car parking demand generated by venue size

Max capacity of a show	1,200	1,600	2,000
Percentage of audience by car	75%	75%	75%
Average passengers per car	2.5	2.5	2.5
Number of cars	360	480	600

4.3 Rail Travel

The propensity for audiences to travel by rail is heavily impacted by the proximity of a rail station to the venue. Based on IPW… benchmarks, between 3% and 36% of audiences travel by rail to events at a venue that has a nearby station, with an average of 16%.

If you assume that between 10% and 20% of audiences will travel by train, this creates the passenger demand for a full capacity event in the potential venue sizes as can be seen in Table 4.2.

There are currently four trains per hour to Leeds with five trains an hour running west from Huddersfield to Manchester. There are plans for improved connectivity for the region in the future. There are currently five trains running to Leeds after 10pm and the last is at c.11.50pm. There are seven trains scheduled to depart post 10pm to Manchester with the latest at c.12.45am.

Further considerations will relate to the capacity of the station and the platforms with regards to crowd control. This is unlikely to present any issues for people travelling to the venue as this is typically a dispersed timeframe, but this will need to be carefully managed at the end of shows/events where a larger number of people will be leaving at the same time. There are a range of management strategies that can be applied to alleviate major issues.

Table 4.2 Train Passenger Generation

Venue Capacity	1,200	1,600	2,000	1,200	1,600	2,000
Max capacity of a show	1,200	1,600	2,100	1,200	1,600	2,100
Percentage of audience by train	10%	10%	10%	20%	20%	20%
Number of passengers	120	160	200	240	320	400

5. Consultations



5.1 Operator Consultations

As part of this process IPW… reached out to industry leading operators and promoters to gain their perspective on the appropriate scale/facility mix for a venue in Huddersfield, what content it may be able to attract and the potential interest in operating the venue. A summary of questions put to operators are set out below.

Eight operators were approached and three of those operators showed an interest in the Kirklees proposal. An overview on the interested operators is provided as an addendum in Appendix C.

Emerging themes and trends from the consultations are summarised in Figure 5.1 on the following page.

- Do you have a view on the appropriate scale/ capacity or facility mix for a venue in Huddersfield?
- How do you think a new venue would fit within the local, regional and national event context from both an entertainment and conferencing perspective?
- In your opinion what kind of content could the new venue attract and programme?
- Are you interested in operating the proposed venue? If so on what basis?
- What kind of contract structure and term would you be looking for?
- There is potential to programme content into an outdoor events space (3,000 capacity). Would this interest you and any thoughts on potential content?
- Any views at this Stage on what the potential financial return to the Council might look like?

Table 5.1 Operators approached for Consultation

Operators
OVG Oak View Group
Trafalgar Entertainment
Broadwick
Ghostwriter Consultancy & Events
AEG Presents
ATG Ambassador Theatre Group
Live Nation
ASM Global

5.2 Local Consultations

At this Stage of the work, a detailed consultation exercise with all the local stakeholders was not undertaken (as was included the previous study).

However, alongside the Soft Market Testing exercise, IPW… did undertake consultations with some of the key local stakeholders, to understand their perspective on a new venue being developed as part of the OCH project.

The key local stakeholders who were consulted included:

- Lawerance Batley Theatre (LBT)
- Huddersfield Town Hall (HTH)
- University of Huddersfield (UoH)

These local stakeholders were consulted due to their very close proximity to the OCH site, and therefore the likelihood that a new venue will impact on these venues.

The key points raised by the key local stakeholder consultations are summarised in Figure AC.1 in Appendix C.



5.2.1 Impact on Local Venues

As identified in the consultations with the key local stakeholders, a new venue in Huddersfield will have an impact on local venues including the Lawrence Batley Theatre and Huddersfield Town Hall. Both these venues have expressed concern that a new venue would have a negative effect on their business.

The Lawrence Batley Theatre and Huddersfield Town Hall both host a range of events throughout the year, but their current offers are not seen as a direct competition for the new venue being proposed at the OCH site.

The Lawrence Batley Theatre is a small-scale theatre (400 capacity) and does not have the infrastructure to attract major touring acts, so is limited in its scope of events.

Huddersfield Town Hall is not considered fit for purpose for large standing concerts due to its acoustic limitations and the venue being on the first floor (which also comes with challenges when it comes to loading and unloading).

Due to the close proximity of both venues to the OCH site, they are seen as facilities that can support the overall entertainment infrastructure in Huddersfield alongside a new multi-purpose venue.

Further detailed financial work will need to be undertaken to test if a new venue in Huddersfield will have a significant impact on the existing venues. This includes programming and P&L projections which would highlight both successes for the OCH venue and potential impacts on the other local venues.



5.3 Flytower and Theatrical Content

Through the Soft Market Testing exercise, some operators have indicated that the facility would be more attractive if it included a flytower as part of the facility mix. This opportunity was highlighted by operators with a background in managing theatre venues.

Two of the interested parties are very interested in exploring this commercial opportunity for themselves, the audiences and Huddersfield, if a flytower was in place. Such an approach might add 30-50 events to the annual calendar in a multi-use venue.

A flytower is a structure above a stage used to house and operate a rigging system that allows for flying scenery, curtains, lighting, and other stage elements. It is a vital component in modern theatrical productions, enabling the efficient movement of these elements in and out of view of the audience.

Consequently, should any future operator procurement secure interest from operators with a theatre venue background, then the potential to include a flytower in the facility mix may form part of any future lease and/or management arrangements for the venue.

Developing a venue of the scale proposed, with the potential to stage theatrical productions, will result in the venue competing with the larger theatres in West Yorkshire and wider 45-minute drivetime catchment. This would include the Alhambra in Bradford (c.1,400 capacity) and Leeds Grand Theatre (c.1,450 capacity), both of which are independently operated on behalf of their respective local authorities. Accordingly, Kirklees Council may wish to consider whether it wants to promote a competing theatre with a commercial operator, into the established West Yorkshire market.

In addition, should Kirklees wish to explore this option further it is recommended that Subsidy Control issues potentially arising are considered at the next Stage of the scheme's development.



6. Market Assessment Findings



Summary of Market Assessment

Significant catchment size at both 30 and 45-minute drivetime, with levels of cultural engagement in line with national average



Catchment areas overlap significantly with Manchester, Leeds, Sheffield and Bradford; all are larger markets



Local venues in Kirklees are smaller scale and will provide a differing offer to new proposed venue



Regional market is crowded, with lots of venues of varying capacities all competing for content and audiences



Current local content is dominated by tribute acts; new larger venue could bring higher profile shows, akin to regional venues of similar scale



Good local transport links and connections to regional hubs, with supporting services to encourage visitors; hotel stock and car parking to be tested further



Operator feedback notes Huddersfield as a potentially challenging market so optimising facility mix will be crucial to attracting content and producing a profitable venue



Recommendation for a 1,200 – 2,000 capacity multi-use venue, with a mixed programme of events, including theatrical content – to be tested at Stage 2



7. Venue Recommendation



7.1 Introduction

This section of the report sets out the emerging themes of what a potential venue should be as part of the OCH development. Its sets out the size and scale of the venue and the key elements that should be included in any design.

This section also compares the proposed venue with what was previously proposed, highlighting any key differences to the previous study.

Additionally, it looks at the potential of a sports arena with a c.5,000 capacity at the OCH site which might provide a home for some of the West Yorkshire indoor sports teams.

7.2 Proposed Venue

Following the market assessment exercise and the soft market testing conducted with the selected venue operators, we would recommend a venue of capacity of 1,200 in a fully seated mode and a maximum capacity of 2,000 using a standing floor and seated balcony to best meet the OCH project objectives.

The design could also accommodate the ability to split the main auditorium into two spaces so that a smaller capacity secondary space of c.400 can be created (see below).

From the discussions with operators, it is very important that the venue is designed to be as flexible as possible and can accommodate a wide variety of events. All of the operators indicated that Kirklees would be a challenging market for them and to that extent the venue needed to be capable of holding as many different types of events as possible.

To that end, two of the operators who expressed an interest stated that for them it would be particularly beneficial and attractive if a proscenium arch and a flytower were included in the design. This would enable the venue to hold touring theatrical events. These would be in addition to the concerts, other entertainment events and the daytime business events such as conferences that could be part of a programme.

The inclusion of a digital screen to the exterior of the building should also be considered for the venue. The venue's position, with considerable passing traffic, could generate significant sums from advertising revenue as well as providing a platform for advertising events at the venue and OCH in general. To maximise any revenue the screen should be fully functional with the ability to show moving images. The newly renovated Bradford Live venue included such a screen which is a significant source of revenue for the landlord. However, it is understood that the inclusion of any such screen would be subject to obtaining suitable planning permission. Additional analysis will be undertaken with a sector specialist company at the next Stage of work.

7.2.1 Second Space

If a smaller temporary space were created at the venue, then this would be useful for smaller events, rehearsals and community activities. From other consultations conducted, a second space would be an attractive space for other Kirklees cultural users such as Musica Kirklees.

In addition, the space could be used for overflow activities from the museum, library and gallery. It could create a meeting and event space linked to the museum and gallery in particular.

There is also the potential to create an immersive space in the smaller space with the use of screens and projection. The space would allow for imaginative and inventive curation of an extended programme from the museum, gallery and other Kirklees inspired cultural events. We anticipate that these immersive spaces will become more popular for both cultural events and more commercial activities in the future.

The cost of the required technology has fallen significantly since the first of these immersive venues were established. Immersive spaces work well if there is ownership of interesting intellectual property (IP). Kirklees potentially has this with its museum and gallery antiquities, as well as the festivals that it regularly programmes.

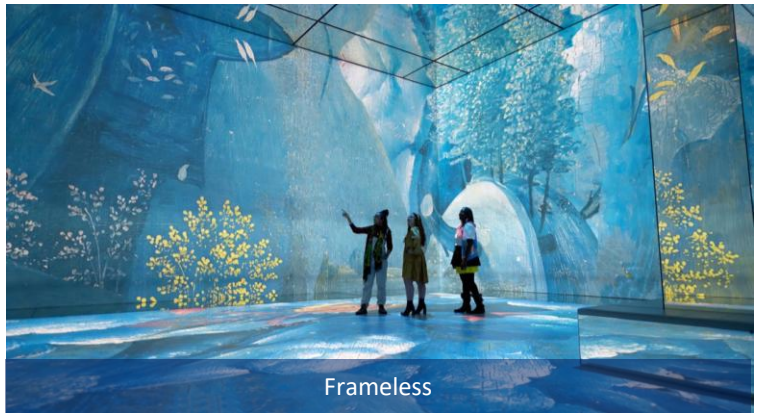
Content could include a range from an artist's immersive, a brass band immersive, textiles and mills or the history of industry in the Yorkshire towns.

The costs of such content is principally in digital production. These would be offset by entrance fees and benefactors supporting programmes. Once the content has been created it is then available to produce a long-term programme when the second space is available i.e. when not being used as part of the main event auditorium.

Current examples of major immersives include: the Lightroom at Coal Drops Yard Kings Cross, Frameless at Marble Arch, London and Outernet at Tottenham Court Road, London. There are planned immersives in both Liverpool and Leeds as part of new venues celebrating major IP from those cities.

The immersive spaces also provide an excellent venue for product launches (as seen at Outernet and Excel London). In discussions with these venues, we recognise there is demand for northern based spaces for product launches. This might create an additional revenue stream for the venue, albeit in competition with other spaces/ venues we anticipate to come on stream.


The Lightroom


Frameless


Outernet

7.2.2 Venue Recommendation Summary

In summary, at Stage 1 of the work undertaken, we would recommend the following for the proposed venue to be included as part of the OCH development:

- A capacity of 1,200 fully seated and 2,000 seated and standing;
- A fully flexible venue with the ability to accommodate as many event types as possible including entertainment, theatre content and business events;
- A secondary space created from dividing the main auditorium;
- The inclusion of a Fly Tower (subject to further testing with potential operators);
- Potential to be equipped to be able to run an immersive attraction (subject to further testing);
- An exterior digital advertising screen (subject to planning)

The venue design will be further developed as part of Stage 2 which will see a full sketch up model being developed as well as setting out the venue's key features including the juxtapositions of the various spaces for both front and back of house.



7.3 Proposed Venue Compared to Previous Venue Design

Table 7.1 opposite sets out the key features of the current proposed venue compared to the previous design highlighting similarities and differences. It should be noted that the previous design was at much more advanced Stage than the current venue proposal.

The previous venue design was based on a very detailed facilities description setting out detailed capacities for each event type and for each of the spaces. It also included detailed VIP numbers and spaces as well as ancillary spaces for conferencing. This level of detail will only be developed as part of Stage 2 of the process.

As the table highlights, the proposed venue is of a very similar size and scale to the one proposed before, but importantly it would now have the ability to hold touring theatrical content.

In addition, the venue exterior would now potentially include a digital advertising screen, and the second space would be equipped to host digital immersive experiences.

Table 7.1 Comparison of Current and Previous Venue Design

	Current Venue	Previous Design	Comments
Seated Capacity Main Auditorium	c.1,200	1,250	In practice no material difference at this Stage
Full Capacity Main Auditorium Seated and Standing	c.2,000	2,200	In practice very little difference to 2,200 at this Stage
Second Space Capacity	c.400 split to be determined	440 Standing 320 seated	In practice no material difference at this Stage
Includes Fly Tower	Yes	No	Feature was not included in previous design
Can accommodate Touring Theatre Events	Yes	No	Previous design could not do Theatrical content
VIP Offering	To be determined	200 VIP seats with lounge access	To be developed during Stage 2
Business Events including Conferences	Yes	Yes	Would look to run a similar business events programme
Conference break out rooms	To be determined	3 x 50 person rooms plus divisible 300 person VIP space	To be developed during Stage 2
Immersive Capability in second space	Yes	No	To be tested in Stage 2
External Digital Advertising Screen	Yes	No	To be tested in Stage 2 and with planning authority
Additional Features outside facilities description	None assumed	Sky Bar included	Current assumption is that there will be no additional features
Gross Internal Area	To be determined	Last FCB design c.7,700 sqm	To be developed during Stage 2

7.4 Indoor Sports Venue

We are aware that there are discussions taking place within West Yorkshire about a potential new indoor sports focussed arena for the West Yorkshire conurbation.

We understand that there is demand from the existing netball franchise held by the Leeds Rhinos for a permanent facility in which they can hold their home games. Under the current league rules any new home venue for an existing or new netball franchise should be a minimum size of 5,000 capacity.

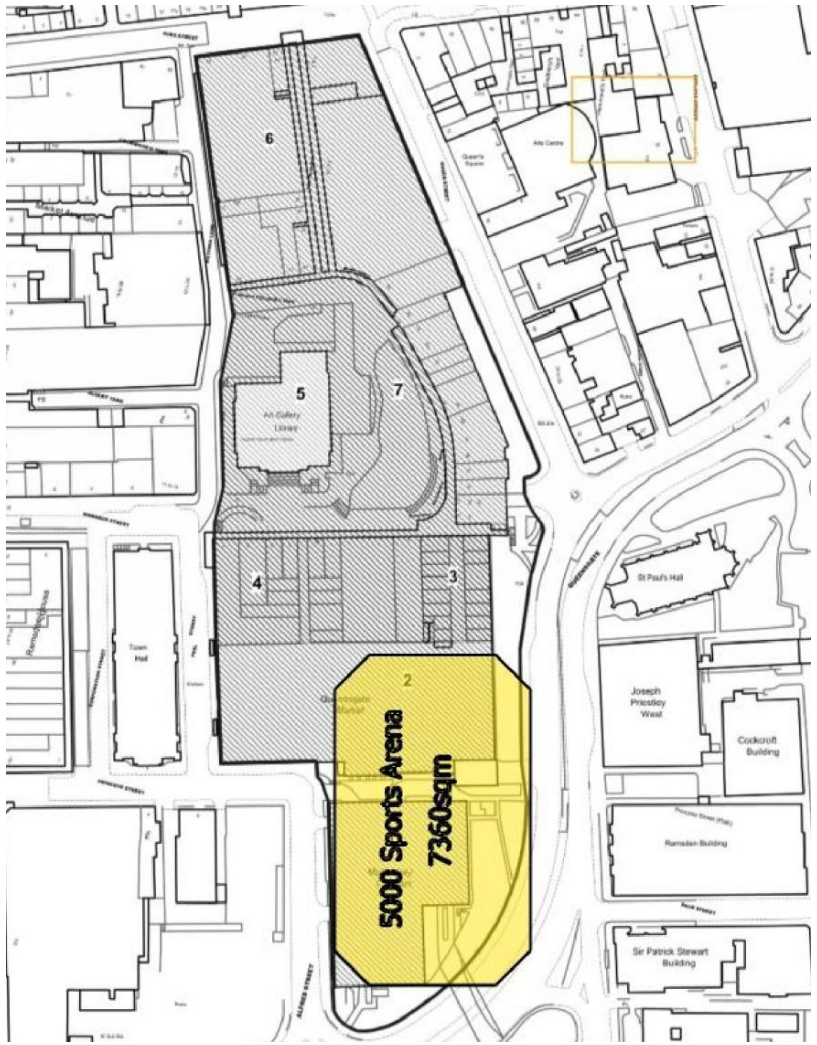
In addition, following a reorganisation, the sport of basketball is looking to set up a new West Yorkshire franchise to compete in the new top UK basketball league. It is likely that the new basketball team would also want a suitable facility for home matches.

The stated position of the leagues is that the aim is to have a 5,000-spectator capacity for any new facility serving as a franchise home venue. As a result, the current position is that the leagues would only consider proposals that meet the minimum spectator capacity requirement.

In order to achieve this the venue would need a gross footprint of 7,360 sqm in a rectangular shape to accommodate 5,000 spectators and the playing area of a netball court. In addition, front and back of house facilities that would be necessary to support 5,000 spectators. It should be noted that a basketball court is slightly smaller than a netball court and so would not determine the overall venue size.

We have plotted what a 5,000-capacity sports arena would look like on the current OCH site. As can be seen in figure 7.1, a venue of this scale would not fit on the site for the proposed venue. The 7,360 sqm footprint is far too big to be accommodated. Any sports venue would have to be of a substantially smaller scale to fit on the OCH site. That size of the sports venue would then be outside the league requirements and also unlikely to be attractive to either the teams or the leagues.

Figure 7.1 5,000 Capacity Sports Venue Overlaid onto OCH Venue Site



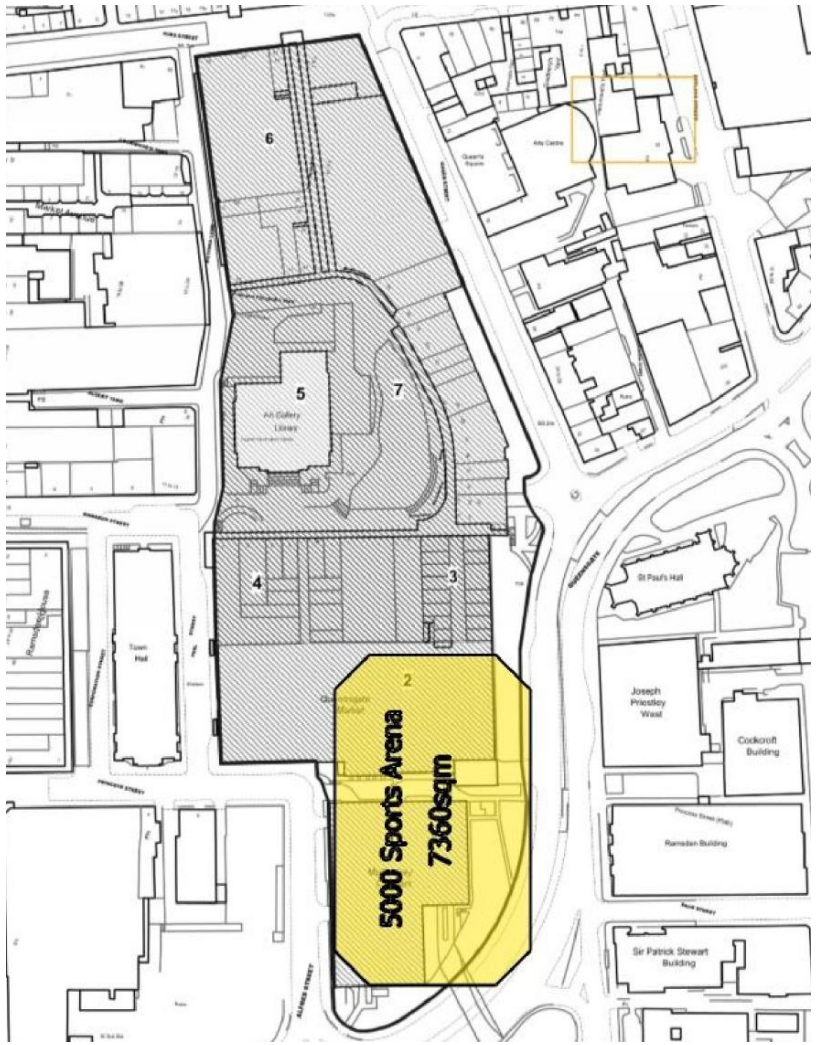
7.4.1 Franchise Appetite

We have also had a number of conversations with the Netball Super League, Leeds Rhinos netball club, the Super League basketball and the current owner of Huddersfield Town Football Club who owns several sports franchises in the USA.

- Both Leagues stated there is very little / no appetite for a franchise based in Huddersfield;
- Leeds represents a much stronger market for prospective franchise owners;
- The current netball franchise , Leeds Rhinos do not want to move to Huddersfield;
- The netball league won't grant another franchise in West Yorkshire;
- The owner of the Huddersfield football club is not interested in a basketball franchise in Huddersfield
- The basketball league is not aware of any investors with an appetite for Huddersfield

However, there may be scope to accommodate a lower-level basketball team such as the current university team if there was any demand from them at the new venue. The spectator capacity in the venue for any basketball match would be in the hundreds, not thousands of people.

Figure 7.1 5,000 Capacity Sports Venue Overlaid onto OCH Venue Site



7.5 Operating Commentary

From the operator Soft Market Testing exercise conducted with the eight operators identified in Section 5 above, some key themes that have emerged in relation to the operation of a venue in Kirklees are:

- All the operators we spoke to identified that operating a venue in Kirklees would be a challenge due to its lack of a distinct catchment, its proximity to the major markets of Leeds and Manchester and the level of competition from existing regional venues
- Any venue would have to be well designed and flexible and be able to accommodate many different types of events
- Two operators were potentially interested in a long-term lease on the venue with a term of potentially 25 years
- Both operators stated that the inclusion of a flytower would be an important feature to them which they felt would enable them to run a profitable event programme
- The other interested operator would need to consider the venue further before any decision on whether it would offer a lease or management fee deal. In addition, the timescales for the development of the venue would need to be shortened if they were to give it serious consideration
- A key feature brought out by all operators was that the venue would be loss making initially and they would be looking for support from the Council as landlord in the early years of operation. All felt that this would only be required in the short term until the venue was established
- Other potential operators stated that the venue was still a long way off being built they would only look at it as proper opportunity nearer the time. The current phasing is beyond the current horizon for most operators.



As outlined above operators would be looking to the Council as landlord for short term financial assistance. This assistance could take many forms including providing a rent-free period. It may be possible to include this short-term cost as part of the capital cost of the venue thereby avoiding it as a revenue cost. Further consideration of any short-term funding requirement will be undertaken in Stage 2, which may include discussions with the Council finance team.

It should be noted that operator strategies change over time and that individual operators may change their position over the timeframe currently envisaged. This would include the theatre operators who expressed a positive interest in the venue. During Stage 2 we will hold further dialogue with these operators to test the added value of the flytower and to solidify their position on the opportunity.

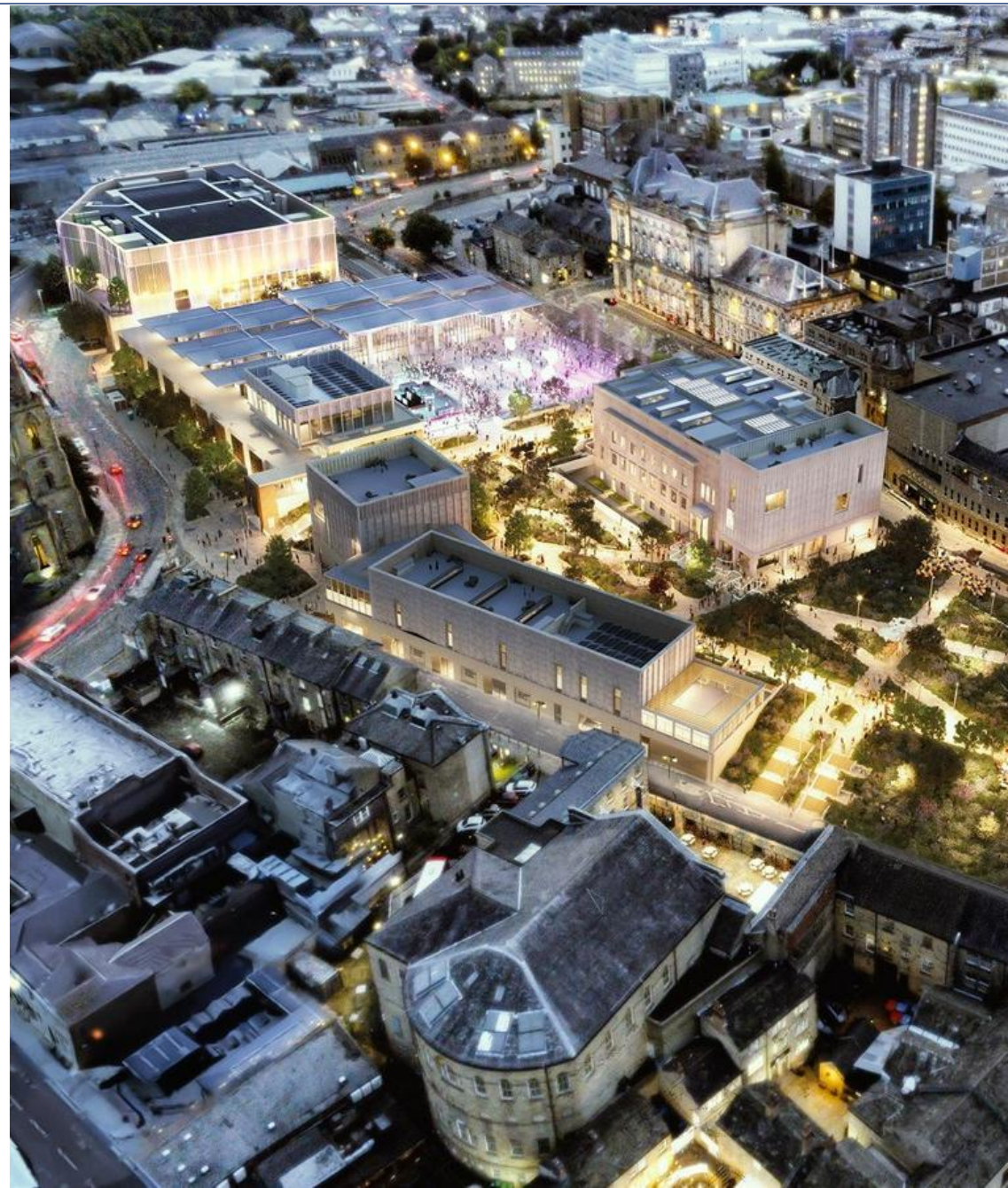


8.
Summary & Next Steps



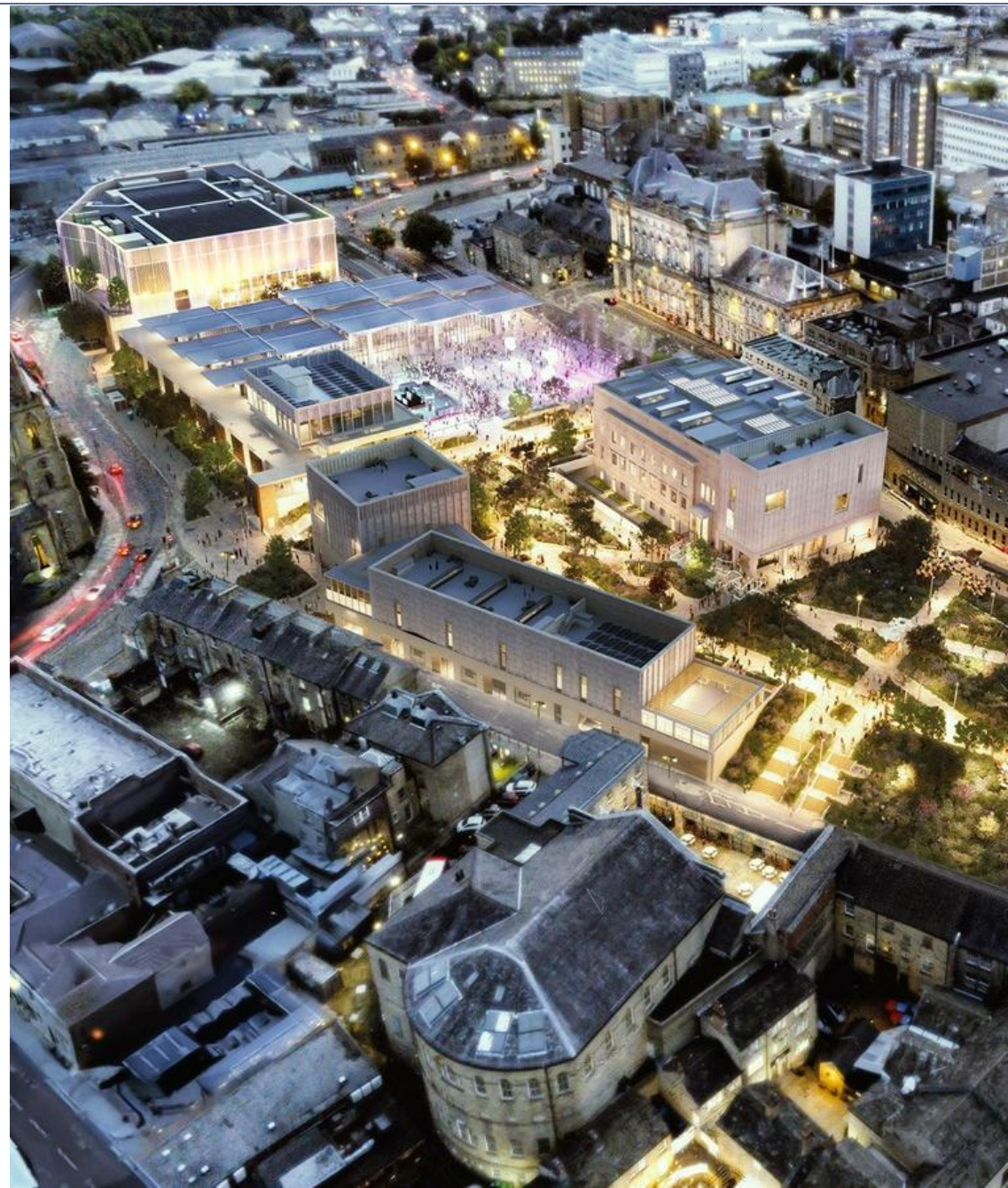
8.1 Market Assessment Summary

- A new venue in Kirklees would have a large catchment area around Huddersfield to attract audiences, within a 30 and 45-minute drivetime, though the unique catchment is limited given the proximity of core cities and other medium size towns and cities
- There is some local competition and significant regional competition due the numerous mid to large-scale venues in West Yorkshire and the wider region
- There is significant regional competition for conferences and business events
- The local population exhibit similar levels of cultural and arts engagement to the national average, but an above average propensity to attend the theatre, which suggests strong regional audiences for theatre content
- Analysing the local content offer, there seems to be a gap in the market for a larger venue in Huddersfield capable of hosting a large number of events encompassing multiple genres
- Three out of eight operators we spoke to are potentially interested in operating a venue, though Huddersfield is not currently a priority market
- Two interested operators stated that the inclusion of a flytower would be an important feature to them which they felt would enable them to run a profitable event programme in time and would greatly enhance the footfall of the venue
- Operators would be likely looking to the Council as landlord for short term financial assistance. This assistance could take many forms including providing a rent-free period.



8.2 Venue Recommendation Summary

- We would recommend a venue of capacity of 1,200 in a fully seated mode and a maximum capacity of 2,000 using a standing floor and seated balcony as best for the OCH project
- A larger venue would be able to capture touring content that currently wouldn't play existing venues in Kirklees
- Comedy and higher-profile concerts would especially benefit given the restrictions of current local venues
- A larger capacity venue could also reduce the competition for content between a new venue and the existing venues
- The design should also accommodate the ability to split the main auditorium into two spaces so that a smaller capacity secondary space can be created
- If a smaller temporary space were created at the venue, then this would be useful for smaller events, rehearsals and community activities
- We believe that a secondary space also has the potential for immersive content, perhaps utilising IP from the museum and gallery
- Consideration should be given as to whether the venue is made suitable for touring theatrical content by the inclusion of a flytower.

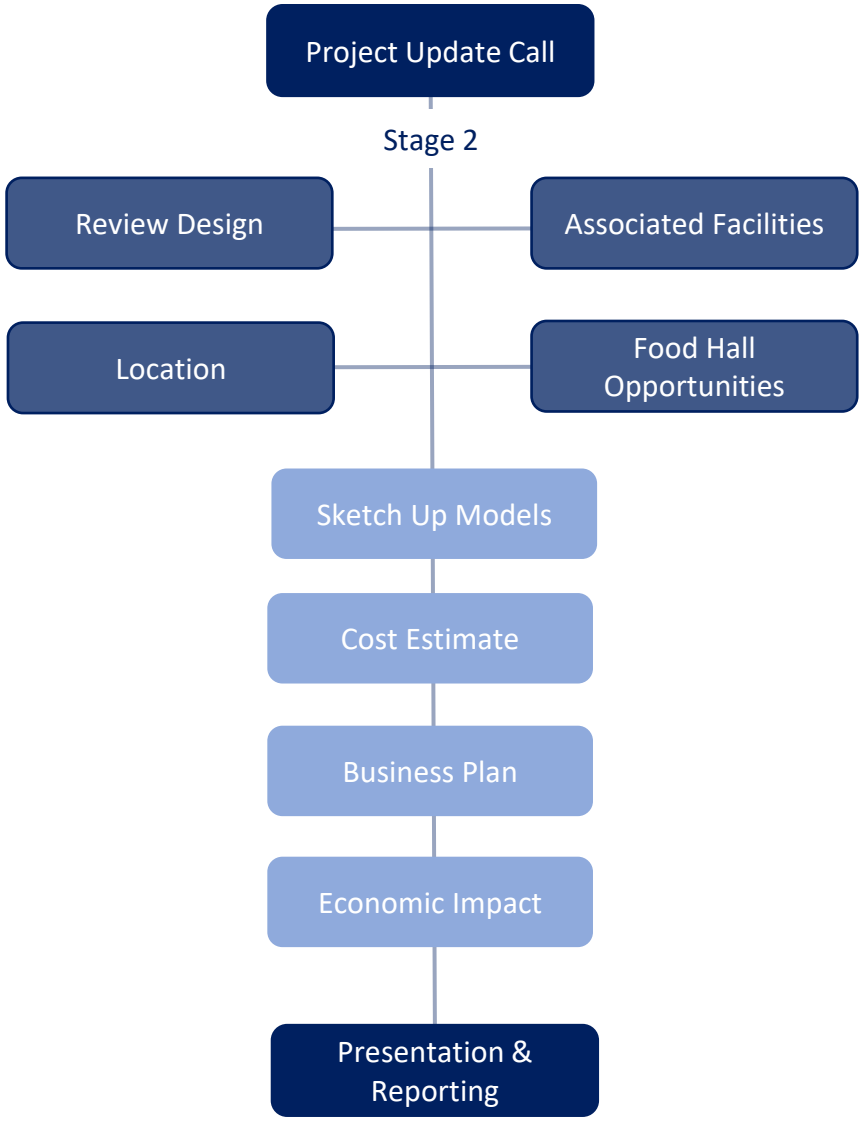


8.3 Next Steps: Assessment of Proposed Facilities

As part of the assessment of original proposed facilities and consideration of opportunities to, we will:

- Review design and delivery solutions as originally presented
- Assess the need for and impact on associated facilities including Food Hall, car park and hotels
- Assess if car park could be provided elsewhere and the impact on:
    - Design
    - Business Plan
    - Opportunities to support the OCH
- Liaise further with operators on the potential for a flytower in the facility
- Create a sketch up model of the proposed venue
- Provide a cost estimate (with support from T&T cost management) and our own IPW… benchmarks
- Produce a Business Plan for the facility
- Look at the location of any venue in the Masterplan, but assuming the existing programmed site
- Look at opportunities and provide commentary on impacts on the Food Hall and the temporary outdoor facilities
- Produce a commentary on Economic Impact of OCH
- Produce a delivery plan for the facility including approach to operator procurement, planning, venue design and construction
- Produce report and present findings to the appropriate Board/Committee of the Council.

Figure 8.1 IPW… Approach to Stage 2



Contact

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Appendix A: Regional Entertainment Venues



Appendix A – Regional Entertainment Venues

Region	Venue	Drivetime from site (mins)	Capacity (max)	Venue Type	Operator
Bradford	Bradford Live	25	3,800	Multi-Use Entertainment	Trafalgar Entertainment
Bradford	St Georges Hall	28	1,500	Multi-Use Entertainment	Bradford Theatres
Bradford	Alhambra Theatre*	25	1,400	Theatre	Bradford Theatres
Halifax	Piece Hall	22	5,500	Outdoor	The Piece Hall Trust
Halifax	Victoria Theatre*	24	1,875	Theatre	Calderdale Council
Leeds	First Direct Arena	30	13,000	Arena	ASM Global
Leeds	O2 Academy Leeds	32	2,300	Music Venue	Academy Music Group
Leeds	Leeds Grand Theatre*	30	1,466	Theatre	Leeds Heritage Theatres
Leeds	Leeds Town Hall	25	1,200	Multi-Use Entertainment	Leeds City Council
Leeds	Leeds Playhouse*	40	1,100	Theatre	Leeds Theatre Trust Ltd.
Leeds	Stylus	30	1,000	Student Focused	Leeds University Union
Leeds	Leeds Beckett Student Union	30	1,020	Student Focused	Leeds Beckett Student Union
Manchester	AO Arena	45	23,000	Arena	ASM Global
Manchester	O2 Victoria Warehouse	55	3,500	Music Venue	Academy Music Group
Manchester	The Bridgewater Hall	45	2,300	Concert Hall	Manchester Concert Hall Ltd.
Manchester	The Union @ Manchester Met	52	1,000	Student Focused	Manchester Metropolitan University
Manchester	Aviva Studios	55	5,000	Multi-Use Entertainment	Factory International
Manchester	Co-op Live	56	23,500	Arena	Oak View Group
Manchester	O2 Apollo	54	3,500	Multi-Use Entertainment	Academy Music Group
Manchester	Manchester Academy	57	2,600	Music Venue	SJM Concerts
Manchester	Palace Theatre*	57	2,000	Theatre	ATG
Manchester	Opera House	54	1,900	Theatre	ATG
Manchester	O2 Ritz	56	1,500	Music Venue	Academy Music Group
Manchester	The Lyric Theatre (The Lowry)*	50	1,700	Theatre	Lowry Arts Centre
Manchester	New Century Hall	50	1,300	Music Venue	Federated Hermes International
Manchester	Albert Hall	55	1,900	Multi-Use Entertainment	Trof
Wakefield	Venue 23	35	850	Music Venue	Venue 23 Ltd.

** Venues with a Flytower*

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Our Cultural Heart- Additional Revenue Budgets (in July MTFP 2025 update) Phase 1 & 2

		2025/26 £000	2026/27 £000	2027/28 £000	2028/29 £000	2029/30 £000	2030/31
Phase 1							
Corporate Landlord	Project Manager	50	60	60	60	60	60
Libraries pre Opening Contingency			55	25			
Events			160	160	160	160	160
Corporate Landlord			323	397	407	412	412
Security			75	90	90	90	90
		50	**673**	**732**	**717**	**722**	**722**
Phase 2							
Museums and Galleries	Pre Opening		127	127	127	0	0
Museums and Galleries	Post Opening					800	800
Corporate Landlord	Post Opening					504	514
		0	**127**	**127**	**127**	**1,304**	**1,314**
Totals (ph 1and Ph 2)		**50**	**800**	**859**	**844**	**2,026**	**2,036**

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Kirklees Transport Strategy, Consultation Results and Adoption

Meeting	**Cabinet**
Date	**09/09/2025**
Cabinet Member (if applicable)	**Cllr Moses Crook**
Key Decision **Eligible for Call In**	**Yes** **Yes**

Purpose of Report

The purpose of this report is to provide an update to Cabinet on the results of the publicity campaign and consultation activity undertaken on the draft Kirklees Transport Strategy, to seek feedback on the amended document, and to seek Cabinet endorsement of the Strategy.

Recommendations

1. That Cabinet note the contents of this report, and the attached strategy document (Appendix E) and other appendices
2. That Cabinet provide any comments or suggested amends on the strategy document
3. That Cabinet endorse the Transport Strategy (Appendix E) subject to any suggested amends as per Recommendation 2
4. That subject to Recommendations 2 and 3, Cabinet authorise the Portfolio Holder for Transport & Housing in consultation with the Executive Director for Place to make any necessary changes to the Strategy and formally agree and adopt the Strategy.

Resource Implication: The delivery of the strategy is not generating a resource request or aligned with a specific budget. The cost to develop the Transport Strategy, included all consultation and engagement activity, is derived from external WYCA funding. Capacity is being regularly reviewed and assessed throughout the process.

Date signed off by <u>Executive Director</u> & name	**David Shepherd – 30.07.25**
Is it also signed off by the Service Director for Finance?	**Kevin Mulvaney – 14.08.2025**
Is it also signed off by the Service Director for Legal Governance and Commissioning (Monitoring Officer)?	**Karl Larrad (on behalf of Samantha Lawton) 19.08.2025**

Electoral wards affected: All Wards

Ward councillors consulted: Yes, see further detail in engagement section of report

Public or private: Public

Has GDPR been considered? Yes

1. Executive Summary

The draft Kirklees Transport Strategy was brought to Cabinet in February 2025, where approval to consult on the draft strategy was given. Following this, the draft strategy went out to public consultation between 03/03/2025 to 28/04/2025. The consultation received over 2,112 responses from individuals, organisations and businesses across the district, this level of response provides a high confidence level that the feedback is representative. Using an industry standard sample size calculation to achieve a confidence level of 99%, with a 3% margin of error, the survey would have needed to achieve 1,842 responses.

Since the survey concluded officers have completed the analysis of responses and the redraft of the strategy document, to reflect the responses to the consultation.

The purpose of this report is to present the results of the consultation and engagement activity undertaken, to seek feedback and to seek endorsement so the Strategy can be finalised and adopted.

A better approach to transport in Kirklees will help to deliver against core Council priorities: good transport is a core factor in the support of investment and regeneration; it helps places to thrive and allows communities to become more connected. A stronger focus on more sustainable forms of transport, which supports mode shift, will help to deliver a greener, healthier Kirklees and work in tandem with our Net Zero ambitions. The adoption of a distinct Transport Strategy will direct this approach and allow the Council to work to better transport for Kirklees and its communities.

2. Information required to take a decision

Once adopted, the Strategy will establish the Council's transport ambition, support decision making, direct future funding bids, project activity and spend. The Strategy will remain fully aligned with the key priorities detailed in the Council Plan.

It may be necessary to make minor updates to the strategy annually to ensure references in the documentation remain relevant (e.g. references to an initiative or project). Such updates will also ensure alignment to local, regional and national policy or legislative changes. This will be done in conjunction with our monitoring and evaluation exercises, to determine progress in meeting our overall strategy objectives.

3. Implications for the Council

3.1 Council Plan

The Transport Strategy is centred around five key strategic objectives:

1. Improving health and wellbeing
2. Protecting our environment
3. Transformational public transport investments
4. Developing inclusive places with better connections
5. Prioritising economic growth

The Transport Strategy will help contribute to the following shared outcomes detailed in the Council Plan: Well, Independent, Sustainable Economy, Safe and Cohesive, Clean and Green. The Transport Strategy is also in alignment with the Key Strategies (Kirklees Health and Wellbeing Strategy, Inclusive Communities Framework, Inclusive Economy Strategy and the Environment Strategy).

Policies within the strategy all contribute to achieving one or more of these objectives, which are aligned with the Council priorities. In particular; achieving a greener, healthier Kirklees and addressing the challenges of Climate Change. And the need to invest and regenerate our towns and villages to support our diverse places and communities to flourish.

3.2 Financial Implications

The development of the Council's Transport Strategy and the activities within the Communications Plan is supported by external West Yorkshire Combined Authority (WYCA) funding. There are no financial implications linked to Council's revenue budgets or capital requirements. The Transport Strategy, once adopted, will support future strategic decision making around funding bids in delivering the wider ambition.

3.3 Legal Implications

The Council decided to undertake a non-statutory consultation on its proposals, which commenced in March 2025. A fair consultation is one undertaken when proposals are at a formative stage; sufficient reasons are given for proposals to allow intelligent consideration together with criteria that will be applied when considering proposals and which factors will be considered decisive or of substantial importance; adequate time is given for consideration and response; and the product of consultation must be conscientiously taken into account before any final decision is taken. Members should carefully consider the outcomes of the consultation

when considering the recommendations put forward by officers in this report including the IIA and all other relevant issues.

The council must comply with its Public Sector Equality Duty in section149 Equality Act 2010. An Equality Impact Assessment (EIA) of the proposed options is advisable. The Council when exercising its functions must have “due regard to the need to”: a) Eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act. b) Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it. c) Foster good relations between persons who share a relevant protected characteristic and persons who do not share it. Section 149(7) sets out 7 protected characteristics namely: age, disability, gender reassignment; pregnancy and maternity, race, religion or belief, sex or sexual orientation.

The Transport Strategy does not form part of the Council’s Policy Framework in the Constitution, and the Cabinet is responsible for approval and adoption of the strategy.

3.4 Climate Change and Air Quality

The adoption of the Kirklees Transport Strategy will help to develop a stronger focus on more sustainable forms of transport, will support mode shift, will help to deliver a greener, fairer and healthier Kirklees and work in tandem with our Net Zero ambitions.

A key objective of the proposed strategy is the protection of our environment, with a transport network that is carbon zero. The Kirklees Transport Strategy will support the achievement of this objective with the implementation of policies which support the reduction of the need to drive, the shift of some trips to more sustainable modes, support the ownership of electric and low-emission vehicles and the mitigation of climate change impacts. A total of 43 policies within the Kirklees Transport Strategy will contribute directly to the protection of our environment and the development of a transport network which is carbon zero.

3.5 Other (e.g. Risk, Integrated Impact Assessment or Human Resources)

The Transport Strategy has been drafted to present a future transport ambition that is fair, balanced and reflects the diverse geographies of Kirklees. There will remain a reputational risk around the extent of representation of certain transport modes. In managing expectations, it is important we consult and engage with our partners, communities and businesses in ensuring a balanced strategy is developed.

An IIA has been completed to ensure protected characteristic groups (as defined in the Public Sector Equality Duty, under the Equality Act 2010 are not adversely impacted.

Integrated Impact Assessments - IntegratedImpactAssessment

4 Consultation

Activity

The consultation on the draft Kirklees Transport Strategy ran for an eight-week period from 03/03/2025, to 28/04/2025. A comms campaign promoted the consultation and engagement activity was undertaken by Council officers, using external funding from West Yorkshire Combined Authority. Full details of the plan can be viewed on the submitted comms plan, but included:

- organic and paid for social media campaigns
- billboard advertisements across the district
- bus backs
- bus interior advertisements,
- advertisements on Radio Sangam.

The consultation was further publicised via press release and E-marketing.

The demographic response to the consultation was monitored throughout, so that paid for media could be targeted to areas and demographics where the response rate was less than anticipated.

During this period, the council held **16 in-person events** across the district (see Appendix A for a full list of locations), promoting the consultation and discussing the issues Kirklees residents are currently facing with transport, and what they would like the Kirklees Transport Strategy to achieve for the district. During these sessions, officers also spoke to businesses, health centres and other public-facing uses in local and town centres, leaving posters and flyers to raise awareness with customers and visitors.

During these in-person events, **over 7,000 leaflets and posters were distributed**, both to individuals and to local businesses and organisations across the district. In addition to this, the team contacted **74 networks and organisations** which support residents with disabilities in Kirklees, had details of the consultation circulated to all schools and colleges in the district, contacted and provided promotional material to the University of Huddersfield. The team also worked with colleagues in Business & Economy to contact **291 Kirklees-based businesses individually**. A total of **165 external organisations were contacted** regarding the consultation. Parish Councils were contacted regarding the consultation, and provided with promotional material, as were all libraries, post offices and community hubs in the district.

Results

There were 2,112 responses to the survey, which is an excellent response rate, compared to other council consultations. Using an industry standard sample size calculation to achieve a confidence level of 99%, with a 3% margin of error, the survey would have needed to achieve 1,842 responses. What does this mean:

- Confidence Level (99%): This indicates how certain we are that the survey results reflect the views of the entire population. A 99% confidence level means that if the same survey were conducted 100 times, the results would fall within the expected range 99 times out of 100
- Margin of Error (±3%): This tells us how much the survey results might differ from the true population value. For instance, where 77% of respondents Agree / Strongly Agree with the Vision, a 3% margin of error means the actual support in the population is likely between 74% and 80%

The Council teams that worked together to develop the SNAP survey have noted that the response rate can be attributed to the high level of in-person activity undertaken, coupled with a successful and flexible comms campaign. For more detail on the demographic range of responses, please see the submitted SNAP survey report at Appendix C. Within the survey, respondents were consulted on whether they agreed with the vision of the strategy and the five key strategy objectives. Please see the table below for the results of this.

	Agree/Strongly Agree	No Opinion	Disagree/Strongly Disagree
Vision	77%	9%	14%
Objective One – Prioritising Economic Growth	81%	9%	10%
Objective Two – Improving health and wellbeing	86%	6%	8%
Objective Three – Protecting our environment	68%	10%	22%
Objective Four – Transformed public transport	88%	4%	9%
Objective Five – Inclusive places with better connections	87%	5%	8%

As evidenced, there is strong support for the vision of the strategy and its five objectives. In addition to this, respondents were also asked to comment on what they would like the Kirklees Transport Strategy to achieve for them and their community. Of the 2,112 total responses, 1,555 respondents (74%) responded to this question. This has provided a rich set of qualitative data, which the team are in the process of analysing. However, the dominant themes from initial analysis are clear, with support for better public transport and active travel options across Kirklees evidenced in these responses. The survey received a high response rate from people with disabilities (30% of respondents stated that they have some form of disability), which has greatly improved our understanding of the lived experience of Kirklees residents regarding how they access transport in Kirklees, and where this is currently not equitable. This has been reflected in the updated draft of the Strategy.

5 Engagement

Engagement on the Kirklees Transport Strategy has been underway since the development of the strategy began last year. This has included:

- Two separate member engagement sessions, where feedback on the draft strategy and discussion on the current issues around transport that wards are facing were encouraged.
- A workshop with technical colleagues from various teams and services across the council, where they were able to comment on the early vision and objectives of the draft strategy.
- Further workshops with colleagues from Highways, where they were able to comment on specific policies included within the draft strategy, and raise potential issues and risks with the implementation of these.
- Presentation of the draft strategy to the West Yorkshire Transport Committee, where they had the opportunity to comment on the vision and objectives of the draft strategy
- Presentation of the draft strategy to the Kirklees Climate Commission, where they had the opportunity to engage with an officer on the draft strategy and its policies.
- Presentation of the draft strategy to the internal planning team, where its relevance post-adoption was discussed, and how this may impact ways of working.
- A workshop with the Combined Authority and districts, where the strategy vision, objectives and policy themes were discussed and available to comment on.
- A workshop with boundary districts (Peak District National Park Authority, South Yorkshire, Greater Manchester) where issues pertaining to cross-boundary transport and travel were discussed.

- Presentation of the draft strategy to the internal Healthy Placemaking Group, where feedback on the vision and objectives was encouraged.
- Promotion of the draft strategy to all internal council networks, where members were encouraged to speak with an officer on the draft strategy if they wished to do so.
- Communication on the draft strategy with ward councillors from other districts.
- Regular bi-weekly meetings held with the local plan team, to encourage comments on the draft strategy throughout its development, and to ensure alignment.
- Promotion of the draft strategy at various stakeholder meetings, such as the Kirklees Bus Partnership and the Active Travel Network, to keep stakeholders abreast of developments and give them opportunity to comment if they wished to do so.
- The draft strategy is currently with internal technical teams to allow them to comment for a final time before the strategy redraft is complete.

Officers have endeavoured to promote engagement on the strategy throughout its development, treating it as an iterative process integral to the shaping of the document. We have found this to be successful, and this has provided us with valuable technical feedback which we have been able to incorporate within the strategy document throughout its development, rather than at set points.

6 Options

6.1 Options Considered

The options which have been considered are:

- (Recommended) That sufficient consultation and engagement activity has been undertaken ahead of the Strategy progressing to formal approval and adoption.
- That the Council do not progress with the adoption of the Transport Strategy.

6.2 Reasons for recommended Option

While the Kirklees Transport Strategy is not a statutory document, the benefits to adopting the strategy are manifest. A better approach to transport in Kirklees will help to deliver against core Council priorities: good transport is a core factor in the support of investment and regeneration; it helps places to thrive and allows communities to become more connected. A stronger focus on more sustainable forms of transport, which supports mode shift, will help to deliver a greener, healthier Kirklees and work in tandem with our Net Zero ambitions. The adoption of a distinct Transport Strategy will direct this approach and allow the Council to work to better transport for Kirklees and its communities. Further to this, the response to the consultation and engagement activity has been positive, with the key headline of the public response being that people in Kirklees would like to travel more sustainably. The implementation of the Kirklees Transport Strategy will help to achieve this. There are no costs associated with the adoption of the Strategy to the Council.

7 Next steps and timelines

Engagement has taken place with the Transport & Housing Portfolio holder throughout the development of the Strategy, and they have given approval to proceed.

The redraft of the Strategy document took place in July. The changes implemented to the draft document which was previously brought to political governance are considered relatively minor, given that the draft document has already endorsed by Portfolio holders and the public.

The changes are largely to the narrative of the document, with some wording changes to policies and the introduction of one new policy. Particular focus has been given to the areas below:

- Bus
- Rail
- Reliability, frequency and network coverage of public transport
- Cost of public transport
- Accessibility of sustainable travel modes
- Accessibility of transport throughout the district

These themes were derived from responses received at in-person engagement sessions, and from analysis of free text responses. All these themes were represented within the initial draft document, however, they have been emphasised more strongly, to reflect the response to the consultation.

The amended strategy was taken to Scrutiny on 11/08/25, where officers responded to questions on the public consultation and metrics used to analyse the success of this, how franchising will impact Kirklees, accessibility, freight and electric vehicles, and the management of vehicle access and parking controls. All queries were responded to within the forum, and do not require textual amendments.

The calculation of the confidence level associated with the consultation response was queried at Scrutiny, and just to provide clarity here, this was calculated on the basis of a total population size of 447,671, with a population proportion of 50%. To reach a confidence level of 99%, with a margin of error of 3%, the survey would have needed to have achieved 1842 responses, which the consultation exceeded.

Subject to any further minor adjustment requests by Cabinet, as well some minor planned amends to reinforce broader Strategy themes around economic inclusion and Transport-Related Social Exclusion, the Strategy will be finalised in September.

Officers will be working with the comms team to develop a ‘You said, we did’ document, which will be made available on social media platforms following the redraft of the strategy document. The team will continue to work closely with our internal comms team to ensure that positive comms on the Transport Strategy is disseminated to the public at key points.

Workshops with internal teams are being progressed, to discuss how the strategy can feed into current ways of working. These are likely to be held soon after the adoption of the strategy, in Autumn 2025. These workshops will be tailored according to audience, and that how technical teams use the strategy will vary depending on their needs and ways of working. We want to make sure that all relevant teams are as informed as possible regarding the strategy, to ensure that it is utilised as successfully as possible.

The Council continue to work closely with West Yorkshire Combined Authority to ensure alignment with their latest Local Transport Plan (LTP4). The public consultation for LTP4 commenced in late July and will remain open until October 2025, and officers have worked closely with colleagues to ensure that messaging for the Kirklees district is appropriate, given the recent consultation on the Kirklees Transport Strategy.

8 Contact officer

David Wildman, David.Wildman@Kirklees.gov.uk

9 Background Papers and History of Decisions

Issue details - Kirklees Draft Transport Strategy Consultation | Kirklees Council
Issue - items at meetings - Kirklees Draft Transport Strategy Consultation | Kirklees Council

10 Appendices

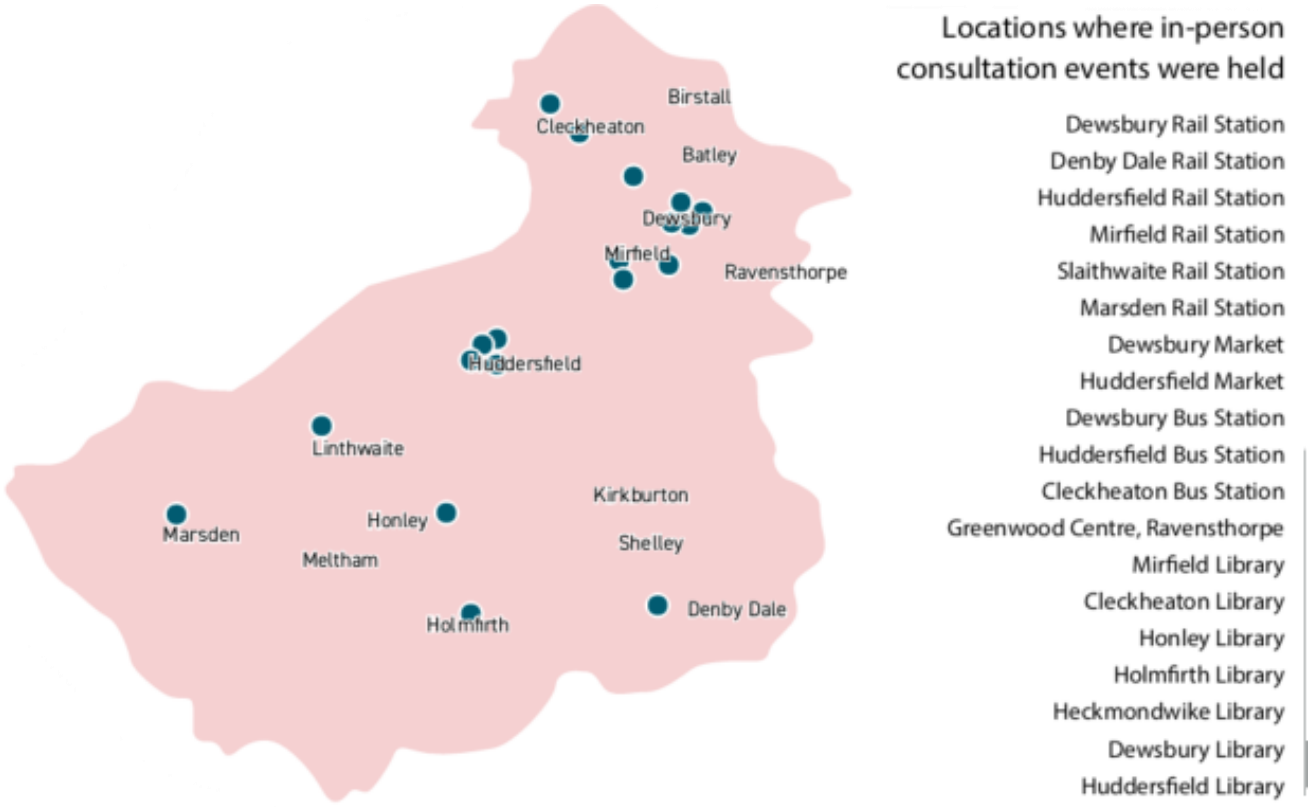
Submitted within Cabinet Report
Appendix A, Map Detailing Locations of In-Person Consultation & Engagement Activity

Submitted alongside Cabinet Report
Appendix B, Comms Plan for Kirklees Transport Strategy Consultation
Appendix C, SNAP Survey – Headline Results
Appendix D, Final Report on Comms Campaign
Appendix E, Kirklees Transport Strategy

11 Service Director responsible

David Shepherd, Executive Director for Place. David.Shepherd@Kirklees.gov.uk

APPENDIX A – MAP DETAILING LOCATIONS OF IN-PERSON CONSULTATION & ENGAGEMENT ACTIVITY



Transport Strategy Consultation – Marketing & Communications Plan

Section 1: Governance Details

Strategic Director	David Shepherd, Place
Cabinet Member/s	Cllr Moses Crook, Cabinet Member for Transport and Housing Cllr Munir Ahmed, Portfolio holder Environment and Highways
Strategic Partners (required for quotes/sign off)	
Business Partner	Rebecca Fitton
Senior Comms Officer	Laura Bartholomew
Date of plan	07/08/24
Updated:	14/08/24

Section 2: Project objectives

What does the council/service want to achieve with this activity?

Gather informed responses from identified target audiences within Kirklees and use results of the survey to inform, influence and shape the transport strategy.

Section 3: Campaign objectives

What will communications and marketing do to help achieve the project objectives?

Promote the consultation to target audiences and motivate them to head to the survey interface. 5,000 responses to the survey between 15 October 2024 and 31 January 2025.

Section 4: Project/campaign details

Template: comms planner/checklist/briefing form

DRAFT

What is the project about?	Gathering information onhow people get around Kirklees, why they travel the way they do (pros and cons) what is important to them on the journeys they take, what they would change and their thoughts and opinions on the proposed visions and objectives of the transport strategy. Responses will inform to inform the Transport strategy and influence transport policies, provision and links in Kirklees.
Who are your audience?	Kirklees resident's representative of the demographic of Kirklees - with a specific weighting on car users.
What do we want our audience to do? e.g. call to action, behaviour change	Feel motived to take part in the transport consultation.
Where is it taking place e.g. specific location, town etc?	Kirklees wide As part of the consultation drop in sessions will also take place locations/frequency/dates TBC – detail from service
Who is involved?	Lucie Wade, Project Manager, Transport Strategy and Policy Rachael Seymour, Project Manager, Transport Strategy and Policy Rory Davis, Transport Strategy and Policy lead Matthew Ward, Project Officer, Transport Strategy and Policy (Rail) Judith Anderson -
When is it taking place?	Consultation will be live mid-January 2025 to mid 2025 (approximately)
Why is the council doing this?	To inform the transport strategy and prioritise outputs.

Section 5: Evaluation

DRAFT

Campaign Objective 1.
Promote the consultation to target audiences within Kirklees, gaining a XX% or XX number of visits to the survey landing page between mid January and mid-April 2025
How will you measure your success at achieving the objective?
Overall click through rate to survey interface/landing page Individual measurements from each channel/social media platform where possible using unique codes to determine channels.

Campaign objective 2.
Xx% Click through rate from survey interface media platform/drop-in sessions to numbers completing the survey between mid January October 2025 and mid-April 2025.
How will you measure your success at achieving the objective?
Comparison of lick through rates from survey interface to completed surveys Specific questions on the survey should help Identify if the target audience has been represented such as Postcode, age and current and main mode to travel

DRAFT

Section 6: Finance

Campaign Budget:
£20,000

Cost Code:
TBC

DRAFT

Section 7: How will we let people know about this project?

Select the channels that are most relevant to your project – delete and add to the list to meet the requirements of your campaign.

Marketing and Communications Channels	Audience	Key message	RAG Status	Officer Responsible
Media Relations				
Press Release	Press/residents	Why we're consulting on transport and what it will result in.		
External: Organic social media and web				
Kirklees Together	Residents	Why we're consulting on transport and what it will result in.		
Facebook	Residents	Why we're consulting on transport and what it will result in and link to take part.		
X	Cllrs	Why we're consulting on transport and what it will result in and link to take part.		
Gritter twitter	Residents	Take part in the survey/have your say		
Kirklees Council website (web page)	Residents	Full details of survey and link to take part.		
External: Offline				
Posters type 1:				
Post offices	Residents	Take part in the transport survey		
Dr surgeries	Residents	Take part in the transport survey		
Community centres	Residents	Take part in the transport survey. Support if needed.		
Libraries	Residents	Take part in the transport survey. Support if needed.		
Supermarkets	Residents	Take part in the transport survey		
Religious/community buildings	Residents	Take part in the transport survey		
Colleges	Students and staff	Take part in the transport survey		
University	Students and staff	Take part in the transport survey		
Posters type 2:				

Marketing and Communications Channels	Audience	Key message	RAG Status	Officer Responsible
Pull up banners	Libraries / Community centres	Have your say on the survey – Drop in sessions/support to complete		
Railing banners in car parks	Car users			
External: Direct mail				
Multi-media				
Animation video – for use in campaigns	Residents/ Commuters/ social media	Positive message about making a real difference to transport/contribute to		
Photos – for use in campaigns	Residents/ Communters/ social media / Printed	Transport users (all types of transport, demographics, etc)		
E-Marketing/Comms				
Kirklees news	Residents	Details of the survey and why it's important everyone gets a chance to have their say		
Kirklees online account – log in message	Residents	Have your say: Transport survey		
Screensavers – libraries/CSC	Library users	Have your say: Link to transport survey		
Councillor bulletin	Councillors	Share details with your constituents		
External: Paid for media				
Ads: Facebook	Women 45+	Shape the future of transport in your community.		
Ads: Google Ads	Residents	Shape the future of transport in Kirklees		
Ads: Sangam radio (multi language)	South Asian residents (ad played in multiple languages)	Have your say on transport delivery on Kirklees		
Advert: Snapchat	16+ audience	Don't miss out – we want to hear from you too.		
Ad: Yorkshire live media package (printed and online)	Residents – Huddersfield	Shape the future of transport in your community.		Secondary

Marketing and Communications Channels	Audience	Key message	RAG Status	Officer Responsible
Ad: Dewsbury Reporter (printed and online)	Residents – North Kirklees	Shape the future of transport in your community.		Secondary
Ad: Telegraph and Argus	Residents – North Kirklees	Shape the future of transport in your community.		Secondary
Ad: Asian Standard (printed and online)	South Asian residents	Shape the future of transport in your community.		Secondary
Outdoor Media				
Ad shells train stations	Public transport users	Shape the future of transport in your community.		
bus panels (inside)	Public transport users	Shape the future of transport in your community.		
Town centre screens	High streets/shoppers	Shape the future of transport in your community.		
Petrol pumps	Car users			
Ad shells/bus stops	Public transport users			
Railway/Bus station screens	Rail/bus users			
Post office Adshels	Residents			
Parking machines/foam backed posters	Car users			
Event				
Event: In person - drop in sessions (libraries/community centres)	Residents/offline/ needing support	Shape the future of transport in your community.		
Internal				
Email/briefing to Councillors/MPs	Elected members	Share details with constituents and the importance of taking part		

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Prize draws – monthly bus pass rail card or bicycle if take part – could be a number of prizes and winners can choose which best suits their lifestyle.

Photography and b-roll for use in campaign.

Animation video

DRAFT

Section 8: Campaign Messages/visuals Planner

Date	Channel	Audience	Message	Call to action objectives	Alt Text for image / graphic	Any other information	Image
EG. 10/05/2021		*Kirklees residents over 25*	*Do you know a local hero? Email us at localheroes@kirklees.gov.uk tell us about them, why you think they are a hero and if you can, send us a picture of them doing their bit and we will give them a shout out and say THANK YOU!* 👏 *#KirkleesLocalHeroes*	*Encourage nominations via email localheroes@kirklees.gov.uk*	*Community champion delivering food parcel to elderly woman at her doorstep.*	*"Please tag these organisations "* *Please us the hashtag*	

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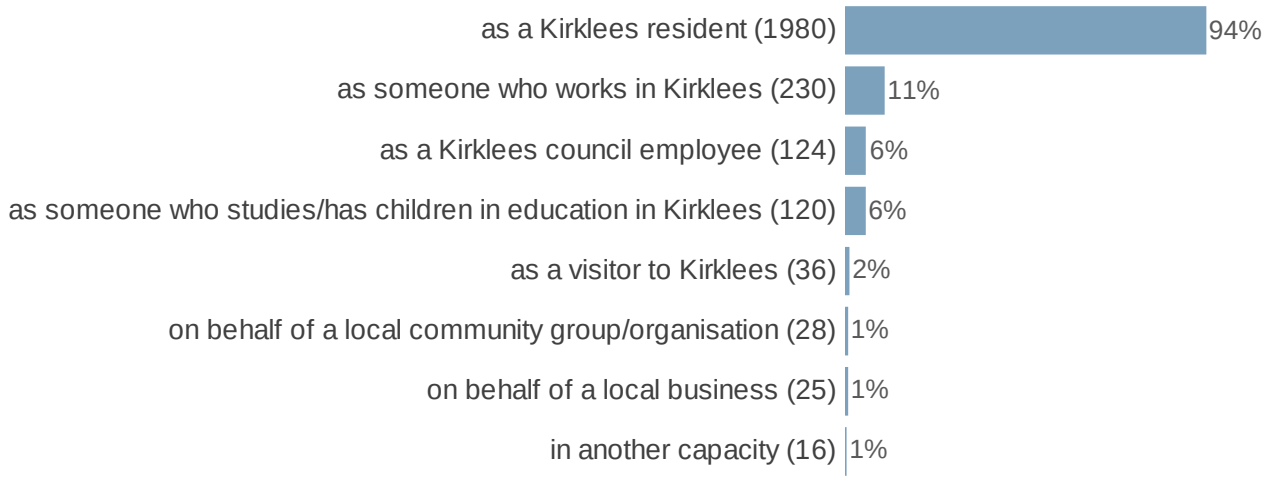
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Kirklees Transport Consultation

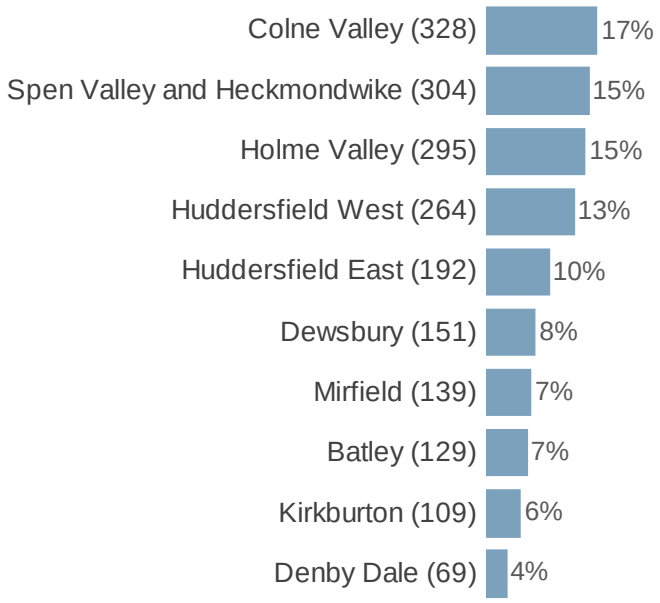
This report was generated on 29/04/25. Overall 2113 respondents completed this questionnaire. The report has been filtered to show the responses for 'All Respondents'. A total of 2113 cases fall into this category.

The following charts are restricted to the top 12 codes. Lists are restricted to the most recent 100 rows.

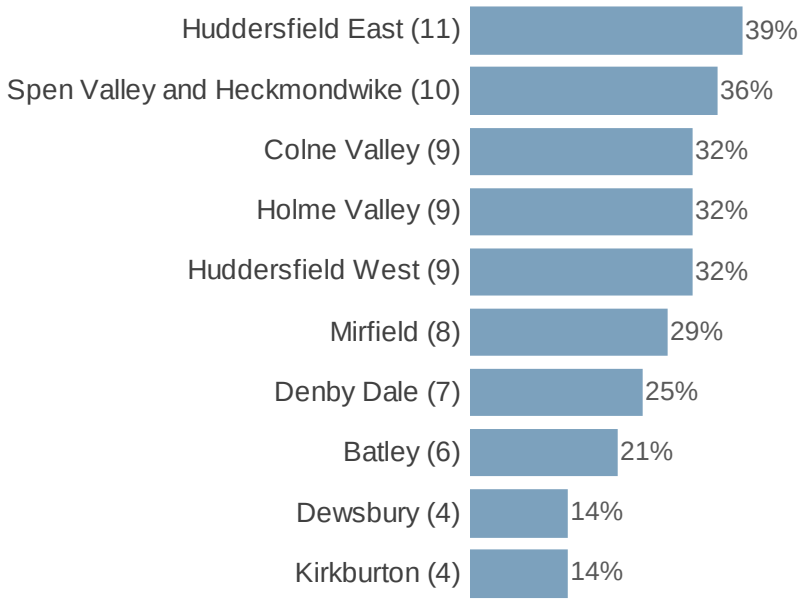
I am responding to this survey...



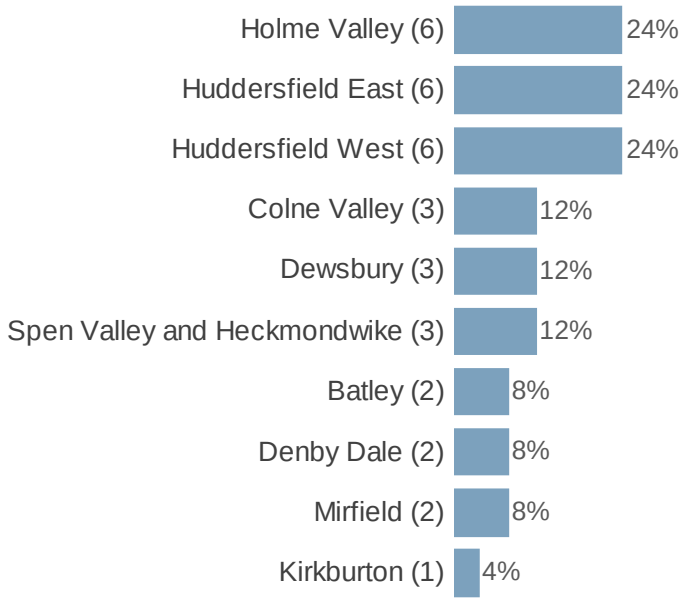
Which part of Kirklees do you live in?



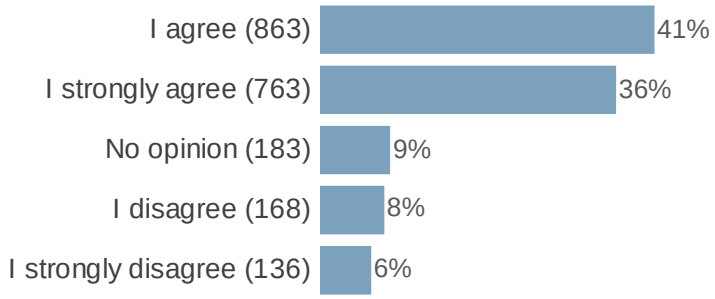
Which part of Kirklees is your local community group/organisation (select as many as apply)



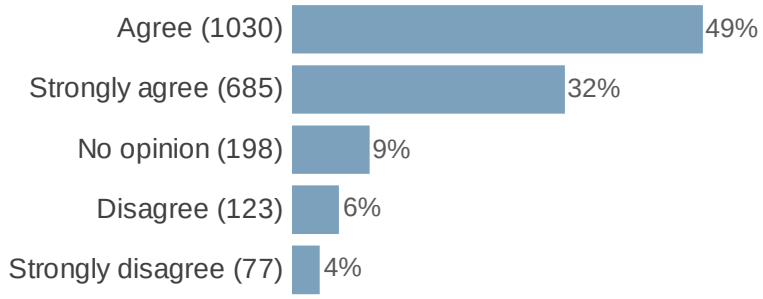
Which part of Kirklees is your business in? (select as many as apply)



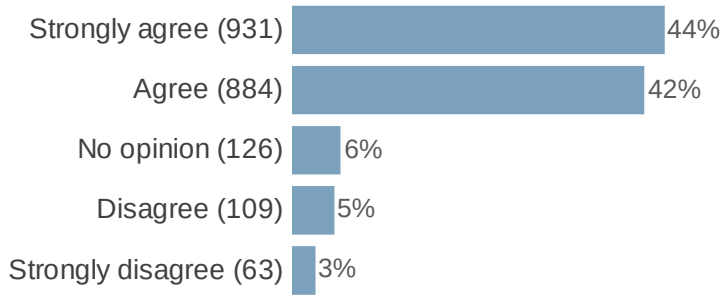
To what extent do you agree or disagree with our Transport Vision for Kirklees?



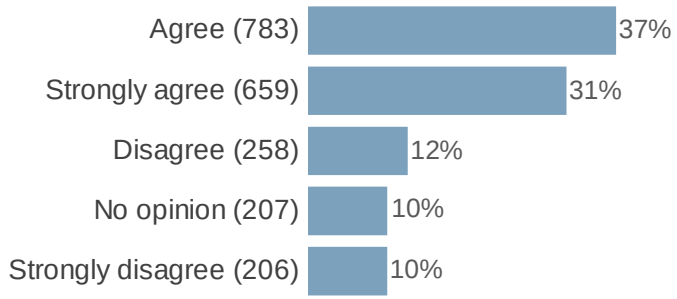
To what extent do you agree or disagree with the 5 objectives included in the draft transport strategy (1.Prioritising economic growth – attracting investment while increasing opportunities and life chances for all)



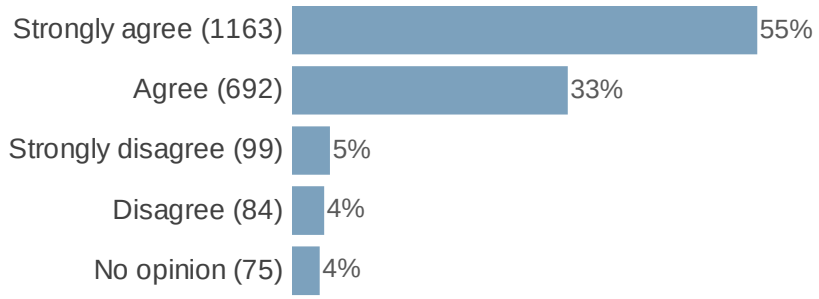
To what extent do you agree or disagree with the 5 objectives included in the draft transport strategy (2. Improving health and wellbeing, supporting safe and active lives for our communities)



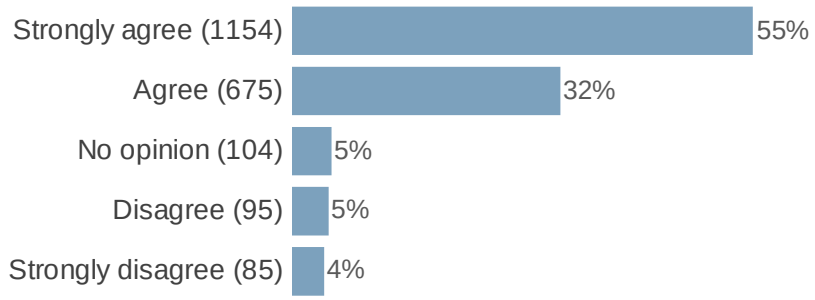
To what extent do you agree or disagree with the 5 objectives included in the draft transport strategy (3. Protecting our environment with a transport network which is carbon net zero)



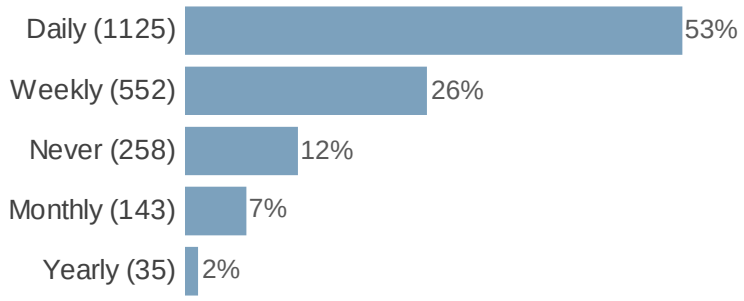
To what extent do you agree or disagree with the 5 objectives included in the draft transport strategy (4.Transformed public transport that strengthens links with the district and beyond)



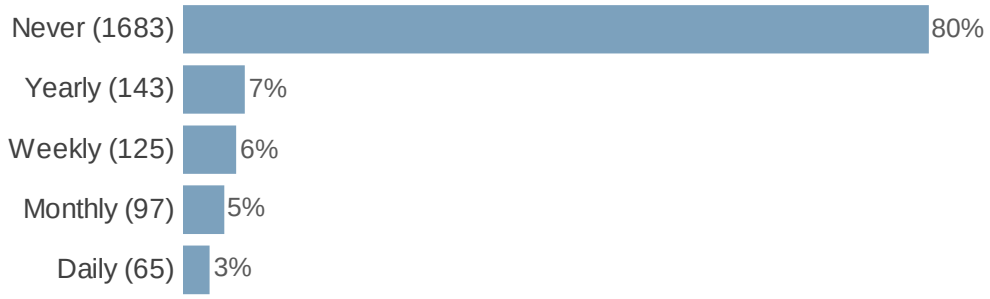
To what extent do you agree or disagree with the 5 objectives included in the draft transport strategy (5. Inclusive places with better connections which are accessible and affordable for all)



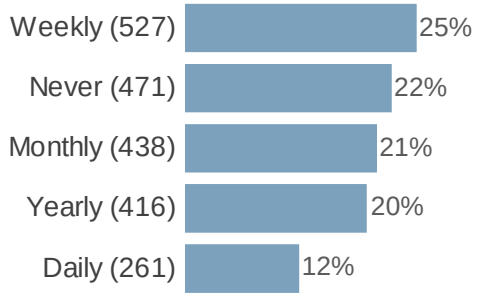
How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Walk/Wheel)



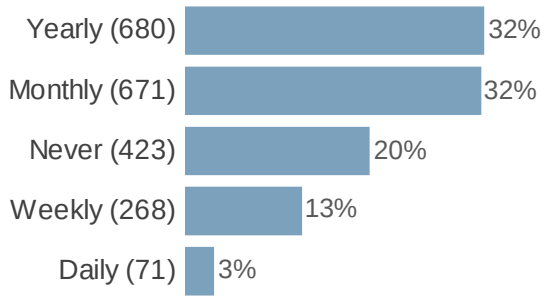
How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Cycle (Bike / E.Bike/Adapted Cycle))



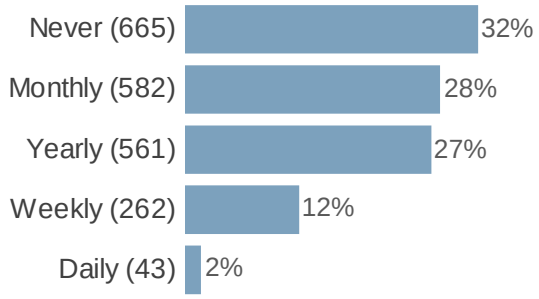
How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Bus)



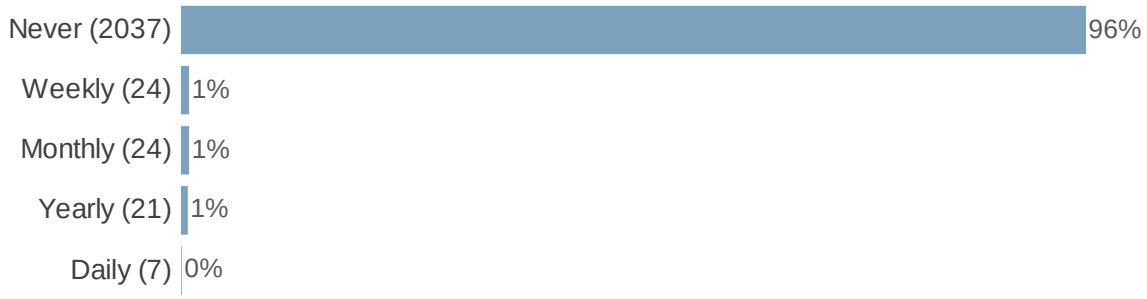
How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Rail)



How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Taxi)



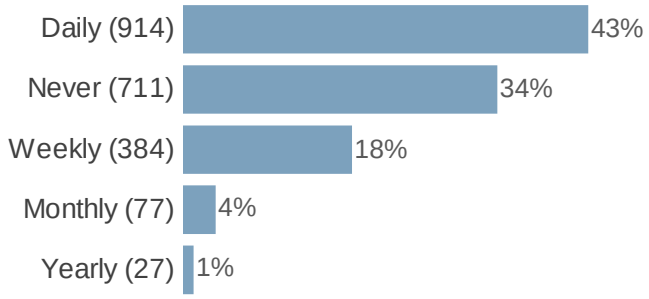
How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Motorbike)



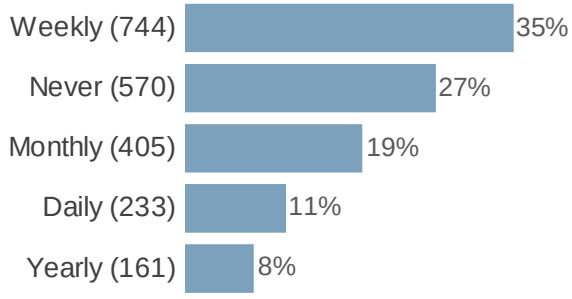
How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Scooter/E-scooter)



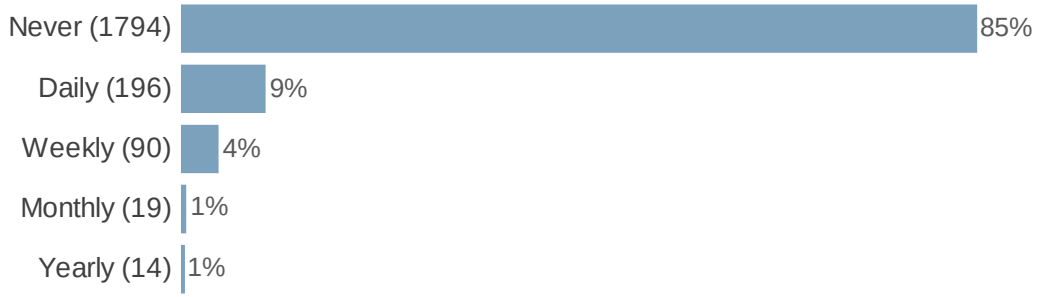
How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Petrol/Diesel Car or van (as driver))



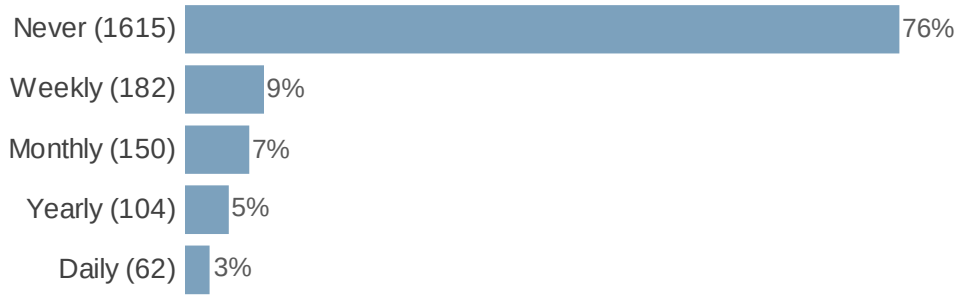
How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Petrol/Diesel Car or van (as a passenger))



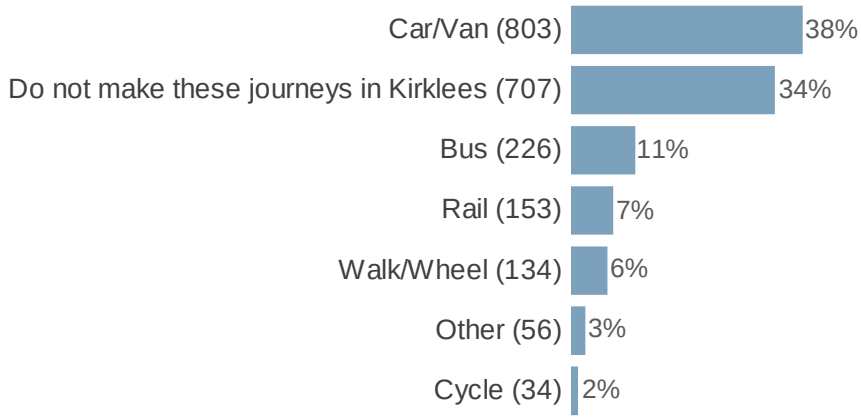
How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Electric/hybrid vehicle (as a driver))



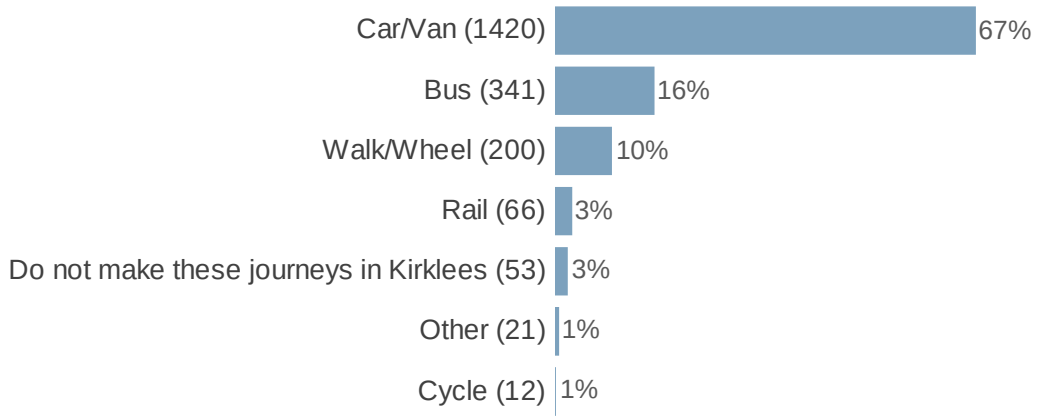
How often, if at all, do you travel by the following forms of transport to or within Kirklees? (Electric/hybrid vehicle (as a passenger))



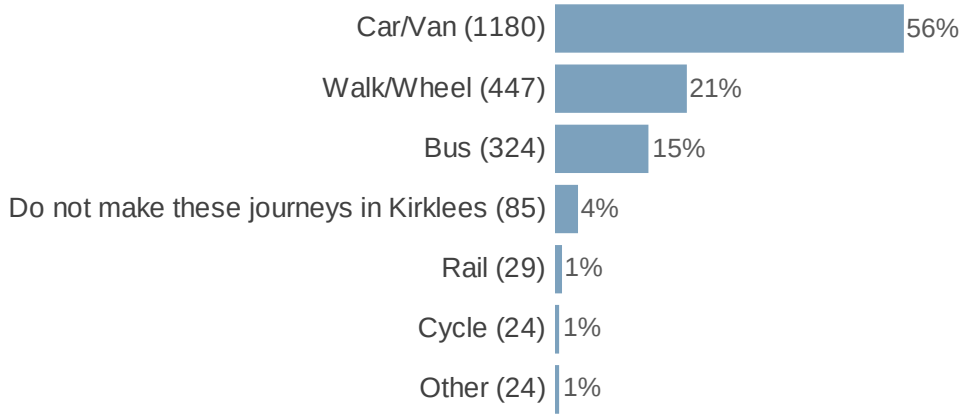
When travelling to or within kirklees, which, if any, of the following types of transport do you mainly take when making the following journeys? (please select only one for each) (Travelling to/during work)



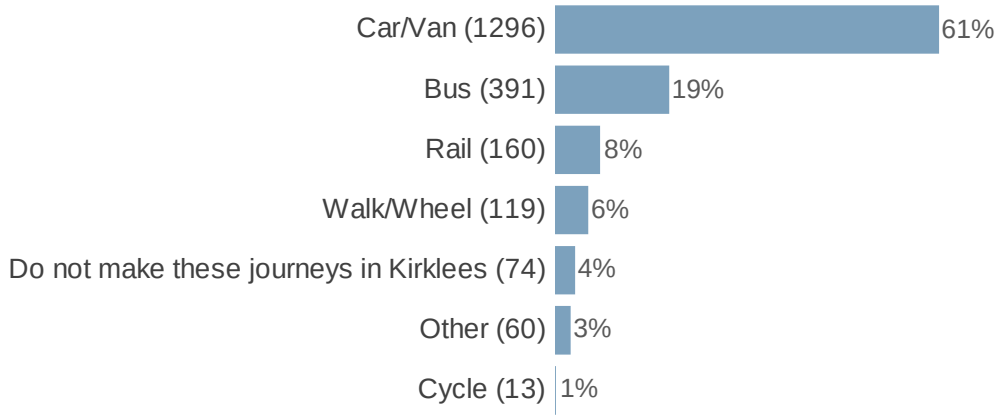
When travelling to or within kirklees, which, if any, of the following types of transport do you mainly take when making the following journeys? (please select only one for each) (Shopping trips)



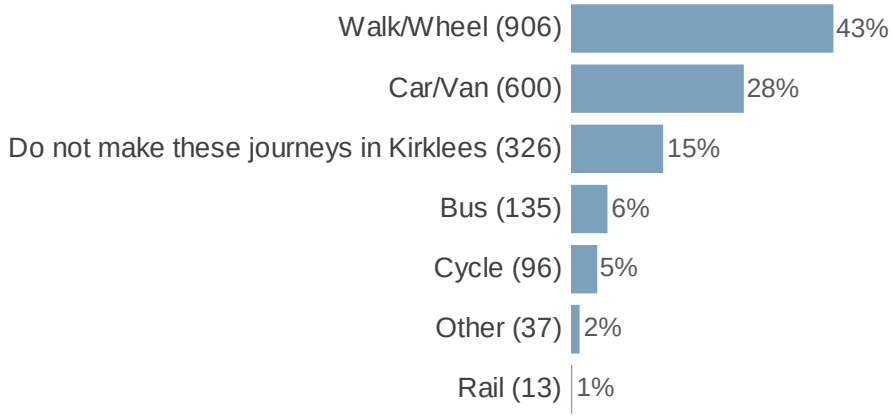
When travelling to or within kirklees, which, if any, of the following types of transport do you mainly take when making the following journeys? (please select only one for each) (Travelling on personal business (e.g banking,doctors, gym etc))



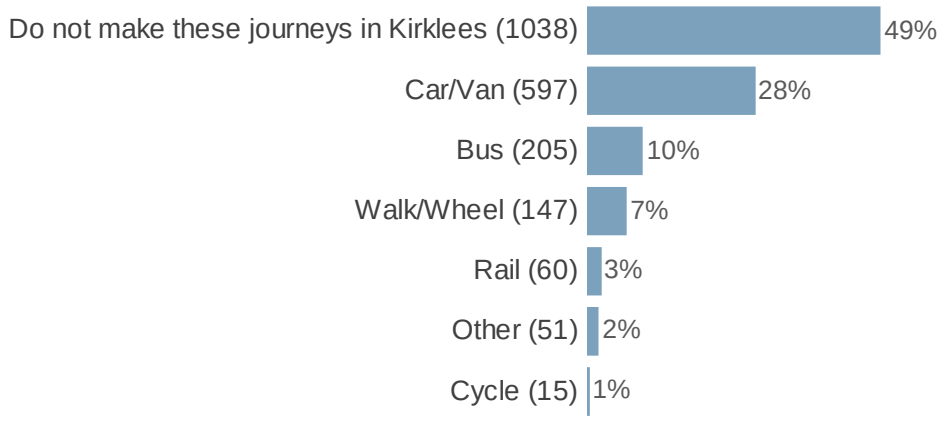
When travelling to or within kirklees, which, if any, of the following types of transport do you mainly take when making the following journeys? (please select only one for each) (Travelling for leisure (e.gvisiting friends, meals out. cinema, venues etc))



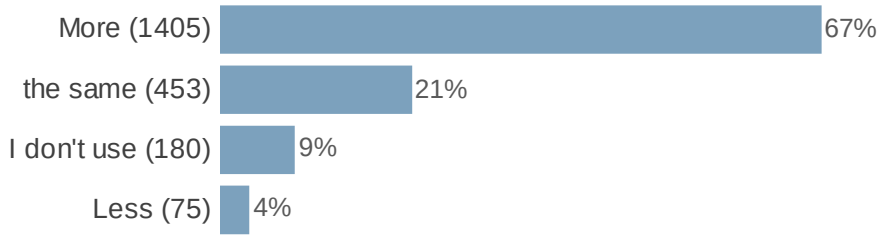
When travelling to or within kirklees, which, if any, of the following types of transport do you mainly take when making the following journeys? (please select only one for each) (Travelling solely to exercise/health and wellbeing reasons)



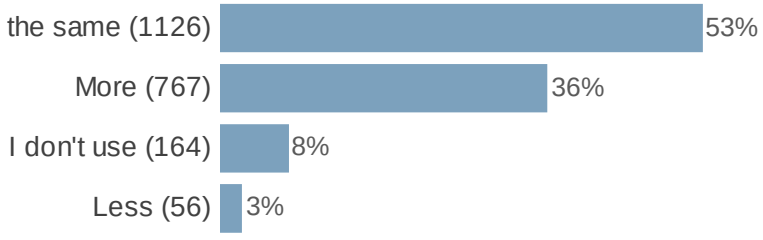
When travelling to or within kirklees, which, if any, of the following types of transport do you mainly take when making the following journeys? (please select only one for each) (Travelling for yourself/others place of education)



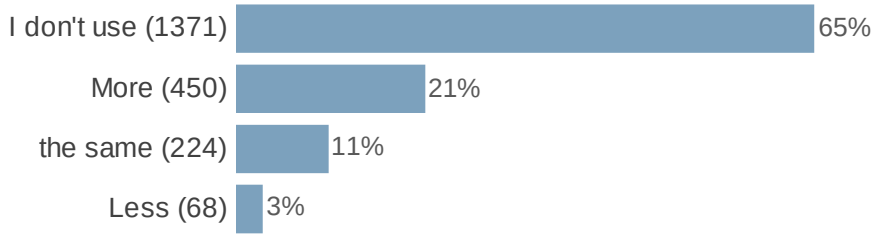
Please tell us if you would like to use the following modes of transport more, less or the same as you currently do when travelling in Kirklees (Public transport (bus/train))



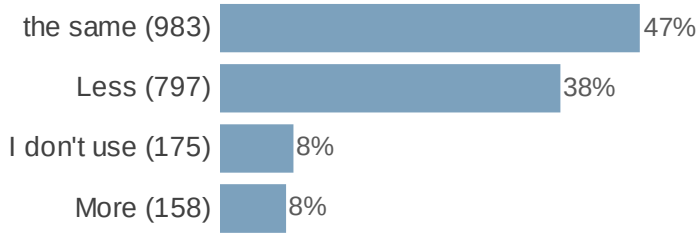
Please tell us if you would like to use the following modes of transport more, less or the same as you currently do when travelling in Kirklees (Walking/wheeling)



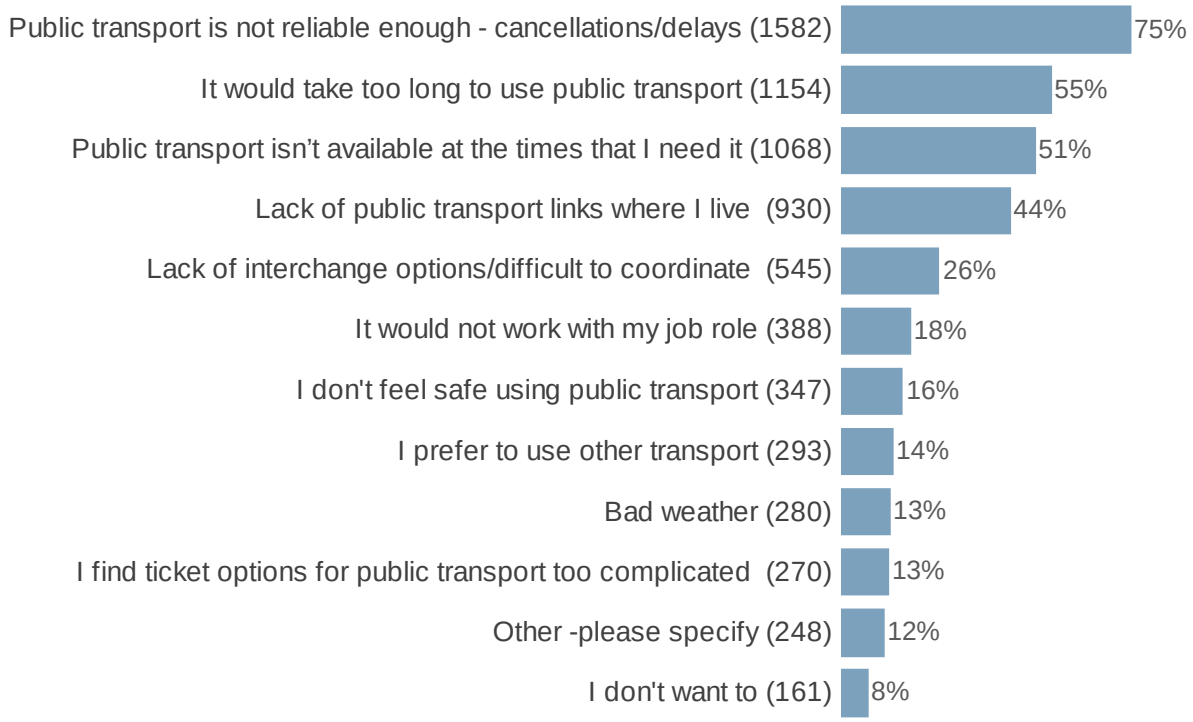
Please tell us if you would like to use the following modes of transport more, less or the same as you currently do when travelling in Kirklees (Cycling)



Please tell us if you would like to use the following modes of transport more, less or the same as you currently do when travelling in Kirklees (Car or van)



Which, if any, of the following are reasons you don't use public transport more in Kirklees? (select as many as apply)



please specify

Too expensive
Just doesnt go where I need to do so
Cost to much
Reliability and frequeny of services(hourly!?!) is very poor
Car
Lack of railway station. Reopen the greenway as a rsilway
Taking elderly friends or dependents to places with varying abilities or inconvenient locations
Trains are too infrequent
I find the Bus Fares Expensive.
Not enough public transport.
Public transport is a total joke
Transpennine express route is constantly out of action
Less convenient than travelling in own vehicle
I feel so much safer in MY OWN VEHICLE
so much easier and convenient to get in a car whenever you need to, no planning.
cost
i use a mobility scooter so can not get on a bus.
Car is just so convevient
I don’t feel safe waiting for public transport particularly in winter when it’s dark, as a woman
Too infrequent service in the Holme valley
Csr or van
Bus and train tickets are too expensive
PRICES OF PUBLIC TRANSPORT
Expensive
Since buses no longer run on the estate where I live I cannot catch a bus as the closest stop is further than I can walk
Due to longer covid my mobility isn't very good
Cost too high
Buses are a joke where I live, always being cancelled, re routed, rude and unhelpful drivers (a few good ones only) internet not updated, need I go on. If I had a car I wouldn’t even get on a bus!
Car
Dirty old and not environmentally friendly, being robbed or assaulted, very expensive
Too expensive
Buses don't turn up when they should..
Buses are disgusting
A bus trip to my volunteer job takes 2 buses and approx 1 hour the connection avoiding town centre takes 10 mins .It got cancelled. Also it counts as 2 jouneys so pay twice
I only travel in Kirklees monthly to work in an office, otherwise I live away from the area
It is cheaper to drive
Car
Tickets are expensive
Feel safer in my car alone than public transport

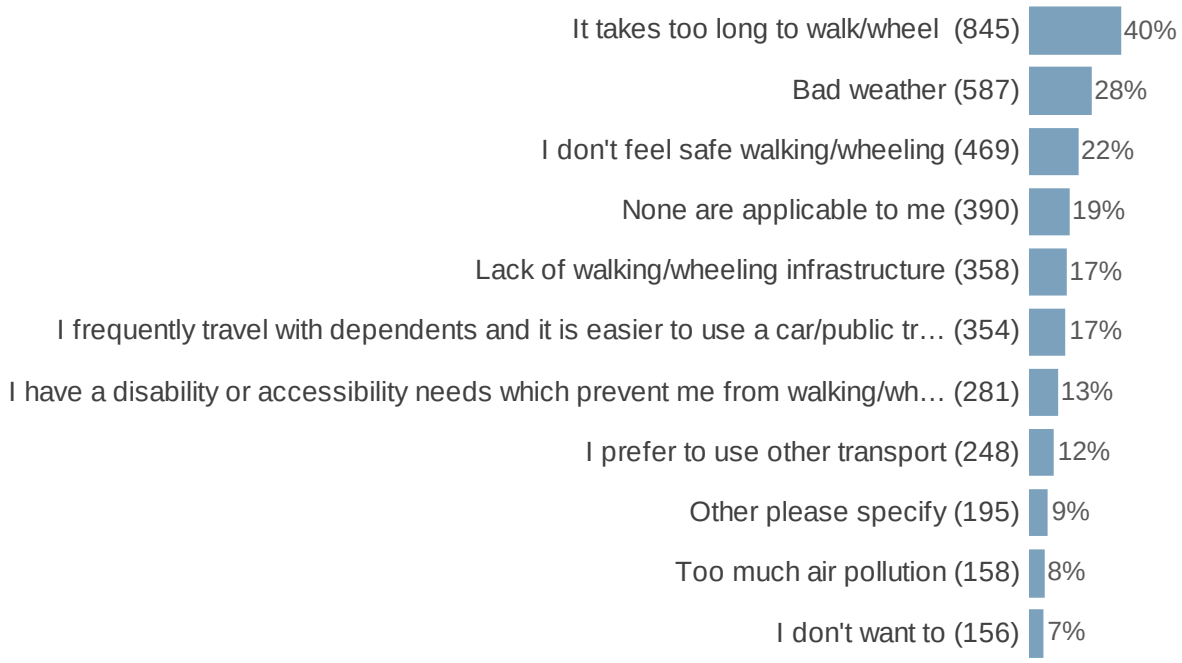
please specify

Tickets are extremely overpriced for the service, the trains moreso.
Cost
To expensive
It is cheaper to drive.
Too expensive
Costs too much
Everything goes via Huddersfield
I rely on my husband to take me anywhere because i have mobility issues that my doctors wont do anything about so i am unable to go anywhere alone without his assistance.
Not explicitly too long but a combination of connections and poor reliability means the choice between a 15 minute car journey on average to over an hour using buses which means I tend to use my car
bus terminals don't feel safe
too expensive
hae to use multiple bus companies with different ticket options making it costly to commute
Often unruly behaviour found on public transport
Rail replacement services are not suitable
Car
Buses are always too busy
I cycle to work unless I am carrying heavy or bulky items, so public transport doesn't meet my needs
New build estate, which bus passes by but no bus stop, nearest is up an incline and difficult for someone infirm
too expensive
I have a young family, takes too long to commute to work via public transport, I sometimes cylce when I have energy/weather permits
Cost, dirty, being preached at.
just as you get used to a bus, the service is taken off.
Travel sickness
Frequency of services
Trains are NOT reliable, also too expensive for the service they provide!
Expensive
It is a fair way for me to go to catch the relevent bus , and more often than not take the car.
The prices are getting expensive
It has become too expensive, lack of public toilets
It costs me more to travel to work on the other side of Huddersfield by bus (2 bus companies) then catch a bus to Bradford (single bus company). It's not right or economical + it's almost as fast to walk the whole 4 mile distance if you include the waiting times for connections..
Too expensive, especially when going out as a couple/family.
Cleanliness and anti social behaviour
Long walk to catch the bus & I don’t feel safe in the bus station at night
I use a mobility scooter and i either need to get lots of separate id cards for each bus company i use or risk being refused entry. Also if there is s pushchair in the wheelchair space, most drivers refuse to ask them to fold the push chair
Lack of flexibility to put my bicycle on bus

please specify

cycling is quicker for up to 5 miles
Affordability was good at £2
Expensive
It costs me £2.50 for a 1.5 mile bus ride!!
Not cost effective always
Expensive
If carrying shopping etc, prefer to drive
Too expensive
Own car
Non Direct routes
Very expensive for short journeys
Hard to complete as an organisation (which is what I'm trying to do here!). Members say that public transport not accessible for them due to eg wheelchair or have issues which are not compatible with public transport (anxiety, autism etc). Some report that the bus station is not safe for their children to use. Others that public transport does not go from where they live to where they need to go. Others that the journey is too complex to manage (change of buses) for their disability.
cost
No bus route without having to drive to a bus stop
Unpredictability about whether you can get a bike on a train - not always room despite booking a space.
Taxis
The general public in general
Buses less frequent in HD7
Live outside Denby Dale, buses irregular and stop of an evening
I am mental illness enhanced disabled I use bus
Prices are getting a lot
isn’t welcoming and have seen poor driving, too often hard breaking
Poor waiting environment - stops,stations and shelters
cost too high in comparison to petrol for the car which i own
No ublic transport at 3 am in morning when I go to work
aswel as the bus service being not reliable (cancellations) the cost is quite expensive when you have a family to pay for

Which, if any, of the following are reasons you don't walk/wheel more in Kirklees? (select as many as apply)



please specify

I need a car for my job
Wheelie bins and vehicles parked on pavements. Walking in the rds. Make me feel unsafe lack of space.
Not capable of walking too far
Shopping might need to be in fridge quicker than walking time makes practical.
Car
I’m too old to walk more
Tranporting stuff
Irresponsible and selfish car users - parking on pavements, aggressive driving.
What walking routes exist are unkempt
I walk my dog, but I like to visit places to do that and I drive
I do try and walk but have a knee problem
Takes too much time which I do not currently have and is better spent in a more productive manner
30 mins walk to village. No buses
Time
Uneven and unmaintained footways
My illness prevents me walking long distances
Busy
Because you waste too much tax payers money on shit projects like the green cycle lane outside town hall that is just a trip hazard. Cost several thousand pounds and I have never seen one cyclist.
I do walk, lots
Parking in town centre is very expensive but I need to be near shops so use a car
Unhygienic littered public paths, greenways

please specify

The traffic free route on the canal towpath is often very muddy
I have a car
Have you seen the hills in the Holme valley? Also no pavements
Unsafe road crossings in Mirfield
You live in Kirklees just look at the state of the roads - developing country standard and worse
Parking on pavements makes walking places difficult and dangerous
Not enough space on many roads for a push chair. Like the bus it's easy to taxi to get my child around then walk or get public transport.
Difficult to go up hills alongside traffic
I cannot walk far due to disabilities
Time is money.
I need to be in multiple places
Too narrow roadside footpaths. Don't feel safe walking right next to road.
No disability but age limits mobility. You didnt ask about older residents!
The street lighting is terrible by me. Lots of shadows and dark araeas with the LEDs
Journey length (17+ miles each way) too great, so only walk last few meters of journey.
Laziness
Lack of available toilet facilities
I walk to work daily
Car
i walk daily
Use a bus as got a child with disabilities but there not reliable
Sometimes just not in the mood
Don't like shipping so when i do i vary where i shop and do bulk shopping so either i need to shop now often or limit shopping at small traders
Can't walk round holmfirth you've closed all crossings and pavenents for months on end
The greenway/ringwayshould include the walkley lane railway cutting to link it up properly
No bus comes near me cannot walk uphill wf12 8qa
Because the council have neglected for decades, ready for use infrastructures like canal towpaths etc
Usually travel with equipment
dangerous narrow roads, inconsiderate drivers, bad potholes
user mobility scooter
Footpaths aren't always cleared
Can you flatten the hills around Holmfirth?
There aren’t a lot of things that are walking distance
Travelling on a mobility scooter there’s not always dropped curbs to cross
Mobility problems due to long covid
Unable to do my job without a car
Age and mobility issues
Too hilly in Huddersfield.I am 75 and wearing out. Downhill ok
i only work in Kirklees, travelling to and from by car, it would take too long to travel by public transport. When at work, I use my car, again it would take too long to use public transport and cost too much.

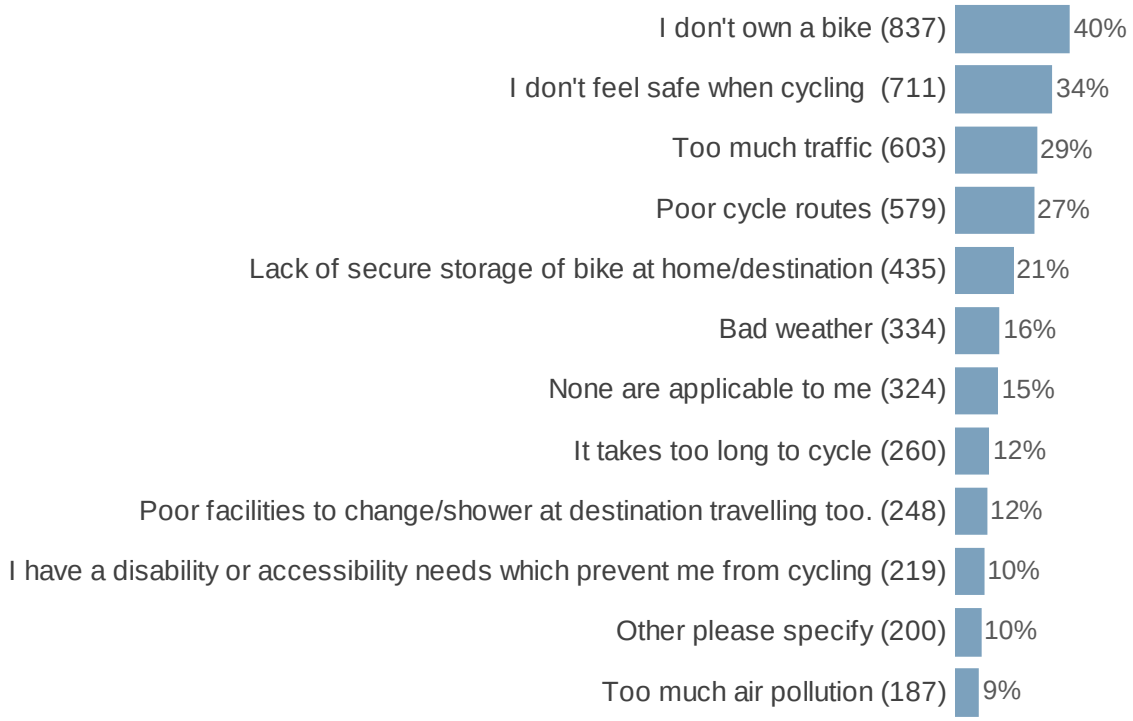
please specify

There are too many hills
Too far to get to places
Car
For being lazy
You can only walk so much or so long
I walk if the distances allows it.
The Hills!!
I have a toddler
To far to walk to work
Steep inclines walking to some areas
only do it for light exercise, plus very hilly where i live
Walking in dark hours don't feel safe at all, especially in the city centre. I get approach by people offering drugs on a regular basis when I go in the city center in the evening, so I stopped doing that.
Age
I walk all journeys under 2 miles, or run or cycle
too far
safety concerns from vehicles cycling from Holmfirth to Huddersfield. My wife fears me cycling
Current main form of transport
I don't want to get somewhere all dusty, hot and sweaty.
Train
Lack of public toilets
hills
I travel in my wheelchair as much as I can, however the pavements are in such a bad state of Repair and the pavements do not have suitable dropped curbs to allow me to cross the roads. This means that I have to use my WAV to get around. This is such a massive shame. Unfortunately, disabled people are not considered within our society very well, although I love how you have included wheelers in this survey. Thank you.
Steep hills
Poor surfacing on paths and pavements
Supermarkets too far away to do shopping on foot
Pathways not maintained or signed
Too hilly for cycling
Littered streets everywhere in Huddersfield makes it an increasingly off-putting to walk, especially in Marsh.
Shopping too heavy
Own car
To many bloody hills
I walk daily for pleasure
Again hard to complete for an organisation but main reason can be that walking is difficult for some with disaibliies, that if one child has a disability and the other children do not, it is very much easier to take them all in the car together rather than try to cope walking etc. Others report feeling unsafe as a disabled person in some environments eg bus station and sometimes around town certain times.
Busy roads make cycling unpleasant.
I walk whenever I can

please specify

Cyclist create traffic hold ups creating more pollution
Topography in the Holme Valley (Topography should be an option presented in the survey)
Too old
Need to carry shopping
Road are dangerous and driver generally unpleasant

Which, if any, of the following are reasons you don't cycle more in Kirklees? (select as many as apply)



please specify

I have a car
I don't have the time to cycle more. And I am not fit enough any more.
Geography
I'm not that fit!
Havent got a bike .far too hilly and the step from a bike i cannot manage anymore.
Too much theft
Dont want a bike
too hilly round here.
It's a ridiculous form of transport. Bicycles are toys and not a serious method of travel
Hills
Scared
The hills.
I can’t take my dog on a bike
not fit enough

please specify

I don’t want to
I dislike cycling
Hills haha
Usually travelling with children so it wouldnt be suitable
Drivers in the area are reckless and I feel unsafe in a car let alone on a bike
Feel unsafe on the roads
Road conditions are shocking
No cycle lanes properly separated from traffic
Because you cant get all your shopping on a bloody push bike
I don’t want to
I don’t want to
Secure storage is a huge concern that stops me cycling to work meetings
Additionally, I live in thornhill, on the mountains, and with the incline it would make it harder to go home.
Driver behaviour
Slopes and hills not conducive for cycling
There is little/no cycling provision in Huddersfield and the Colne Valley. It is dangerous to cycle on the A62. There are some short sections of cycle lanes but oftentimes there are cars parked in them, which is so dangerous as it forces the cyclist into the road and into the flow of traffic. There are so many large trucks and buses on the A62 travelling at speed, with little passing space. I feel incredibly vulnerable when I cycle on the A62
I have a car
To many hills in the Holme valley
No cycle network whatsoever. Cars parked in cycle lanes.
Far too hilly
I’m too old
State of the roads, tarmac is awful and only cheese has less holes
I dont want to cycle
Too old
Too hilly in the Holme valley
Huddersfield is too hilly. Too much traffic
Too slow, too many hills.This is a pennine town.
It is too hilly
Journey distance to Kirklees is 17+ miles each way so can only see cycling as the tail end of the trip and cycle hire unavailable.
Topography - too hilly for older people
I don’t want to.
I moved to Almondbury having been misled into expectingxa really safe cycle route was soon to be provided along Wakefield Road. I can cycle safely and quickly into Huddersfield. But cycling uphill along Wakefield Road awayvfrom the town centre is terrifying, with drivers trying to force me off the road.
Can't stick my Mum on the back
The greenway/ringway should include the walkley lane railway cutting to give a better safer cycling experience.

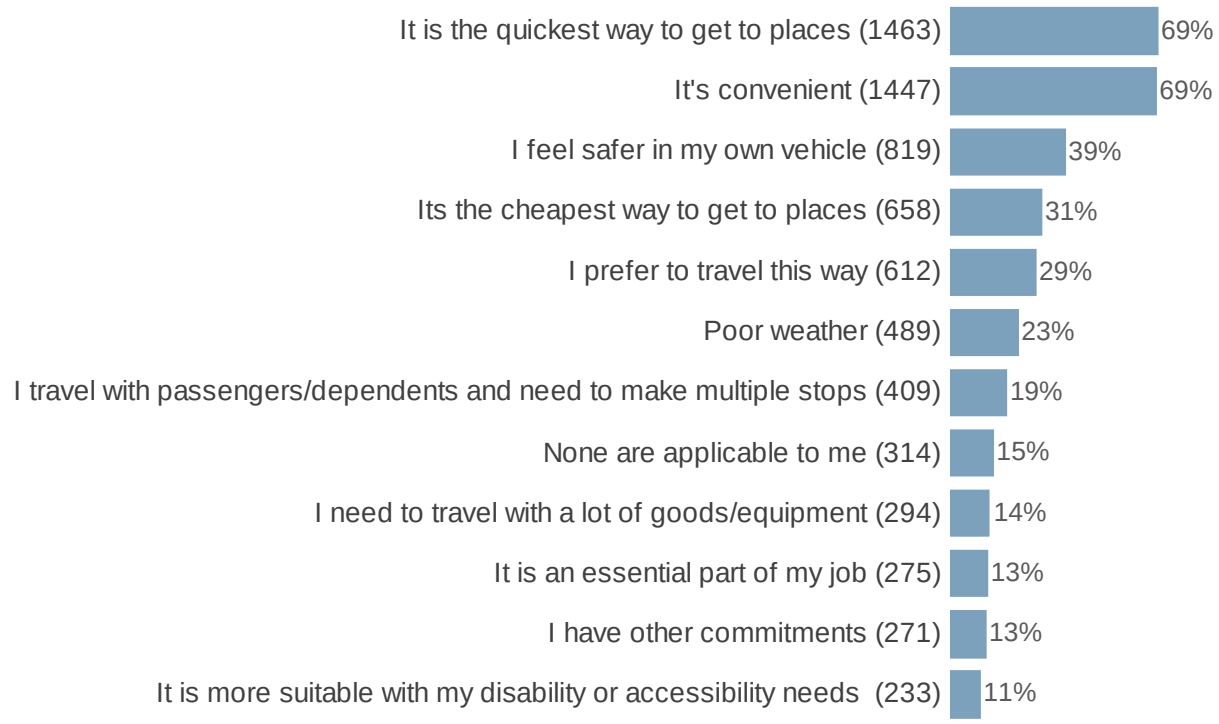
please specify

I don't want to
Recently (7 months ago) and not got back into cycling. Walk more here. It’s very hilly !
Road surfaces are beyond shocking
dangerous narrow roads, lots of potholes, inconsideate drivers
I am a foster carer so have children with me at all times.
Haven't cycled for over 50 years.
Some of the cycle lanes are a joke going throught Ravensthorpe is a cade in point after hudderfield rd was altered thecrd was slimed down with the parling bays put in then the cycle lanes were put in as a after thought
Roads are too narrow and vehicle drivers are in too much of a rush
Cars are better
I do not want to cycle
Waste of time
Too many hills
Too many hills in Huddersfield. Cannot carry shopping on a pushbike.
Risk of Theft of leaving bike in Kirklees
Kitklees is very hilly... cycling is utterly impractical for the average person in Huddersfield.
Too old
I don’t want to die.
There's nowhere safe to put the bike when I get to my destination.
Road surface condition is poor. Only 2 punctures this month!
Our bicycles were stolen and i refuse to replace things when the police do nothing to find the stolen items.
Poor quality roads
Worry bike would get stolen
Cant carry your shopping on a bike
Requires lifestyle changes & greater planning. Often can't just call at unplanned place on way home.
Too hilly
Completely impractical in kirklees. Lack of cycling lanes and too many hills. A white line on the edge of a a road is not safe
I’m too old to be riding a bike and would be a danger to others and myself
Too hilly
I used to cycle but A) rods were not great for cycling along, and B) cycle facilities ie Spen Valley Greenway are not good in winter or at night and are often "taken over" for civil engineering work
I don’t like cycling
secure cycle parking int own centre is a concern + cycling back up the hill with heavy load after shopping can be challenging. I ticked safety mostly in relation to scared of accidents, drivers not looking out for cyclists and very few segregated safe routes..
I am too old
Lack of flexibility regarding combining cycling with public transport
absence of dedicated cycle routes on main arteries (A62 Marsden, A629 Wakefield and Halifax)
Too old, too many hills
I have a weak heart

please specify

Too hilly
Too old
Danger of falls
Roads in dangerous condition
I don't want to
Hard to complete on behalf of an organisation. Main issue is either disability means cycling is impossible - and if one person in the family cannot cycle then often no-one can as cannot travel together. Also disability adapted bikes are expensive.
Cycle lanes keep disappearing or no there in the first place so end up having to ride in peak time traffic which is terrifying at times.
Motivation
Cycling create to much pollution creating hold ups
Police driving pass too fast
Topography (why is this not an option presented?)
Unable to transport what I need for work
Bike theft
Too old
Two many hills
Cycle routes closed around Kirklees and lack of joined up infrastructure for cycles

Which, if any, of the following are reasons why you regularly drive in or through Kirklees? (Select as many as apply)



please specify

Unable to drive any more as partially sighted
Travelling long distances
Parking costs £5 and the bus costs £5. It’s a no brainer.
We have only one bus every 2-3 hours Monday to Saturday. These are only up to 7:30 in the evening. Sundays and Bank Holidays we have no buses at all.
More suitable due to disability
Poor connectivity.Virtually to get from Spen Valley to the Holme Valley
Public transport is not easily available for my journey
Easier to travel with my dog
Partner has car and disability
no transport for the time I go to eork
Weekyshop.
I no longer drive
Lack of public transport options especially on an evening
Heavy shopping
Public transport doesn't go to some of the places i wiuld go. Also if i tried to commute to work on the bus it would take me 2 hours to do a 4 mile journey. I'd have to go into huddersfield and back out again.
My biweekly commute is a school run to Bradford. It takes 90 minutes by car. probably 3 hours and two changes by bus.
Lack of availability of public transport in my village
It’s the only way to get to some places without using 2 or more buses any in taking over 2 hours, eg hospital appointments
I am a passenger not driver; usually for shopping.
To do grocery shopping
I also work weekends that takes me outside Kirklees. The commute is impractical.
After paying fifty thousand to travel in luxury, I’m going to use my car all the time
Lack of public transport and the costs
Have you ever waited for a bus that never comes? You don’t do it again if you can
I can travel where and when I want.
Poor ill-thought through bus routes
I dont drive
Most efficient use of time
No other option
Food shopping
Lack of public transport links, to go to Leeds I have to wait for a bus that might not turn up, walk up the hill and get on trains that are late or delayed, I recently set off from Thornhill at 7.20am and didn’t arrive in Leeds until 10pm.
There is not a climate emergency
Cant drive
More reliable than public transport
Because I like to live life on the edge avoiding all the potholes Who the hell would want a bike.
I’m always a passenger

please specify

While I have an electric car, I'd like to redcue car use as much as possible
It’s reliable
As a passenger, when it would be quicker and cheaper than public transport also when needing to load grocery shopping into the car
Weekly shops, doctors visit during work hours not possible without own transportation
Its privwte, at my temperature and leaves when i need it to.
It’s so much easier and I didn’t buy a car not to use it. I drive safe unlike taxis
Currently Kirklees is only really set up for car travel
Living rural it’s the only choice
Freedom. When you want where you want
Lack of reliable public transport
This is a Penine town full of hills.
I can listen to music, I enjoy driving, it is how I de-stress and have my own space, plus I love cars
Roads are in a disgusting state - it needs sorting!!
I can't drive but my friends do if I go out with them.
Shopping
I do not drive
No railway.
I cycle to Huddersfield Station (for onward travel) and town centre frequently. But in wet or cold weather I prefer not to. After about 6pm the bus services to my home are very infrequent, so I drive.
I take trips with more than one purpose
I travel 34 miles to work and back each day
How would i get to supermarkets, gyms, volunteering placement etc
Keep the children safe, correct car seats etc
It’s the only mode of transport possible. Can we get a Greenfield to Holmfirth/ Honley bus THERE’S SO MANY STUDENTS WHICH TRAVEL FROM MCR TO HUDDERSFIELD AND ITS SO MUCH CHEAPER AND QUICKER TO GO TO GREENFIELD BUT NEED TO GET PICKED UP TO DO THIS
I will give my own private transport up when everyone else has but NOT UNTILL
Goes direct to destination without additional hassle
no need to plan ahead or book tickets, more reliable than the trains
I don't drive. I clicked I don't drive in kirklees!
My teenage children use public transport & it is shocking, unreliable, lack of access, they often miss appointments due to cancelled or ghost buses etc
I don't drive but sometimes there just isn't a bus which will get me there on time so I rely on a lift from someone.
Buses aren't reliable as they don't turn up and the service in Kirkheaton has been greatly reduced.
Travelling by car means less time standing and less risk of being bedridden for days afterwards
Meets the needs of the disabled person i travel with
Can't rely in buses.
Carrying shopping
A desire to avoid the public as much as possible.
Young grandchildren
I can’t drive

please specify

I am guaranteed to be on time if using my own vehicle.
Most reliable
Driving is the only viable option
I enjoy the process of driving
enjoy owning a car
I often give my grandchildren and daughter in law lifts
If I need to buy bulk items.
No buses at time of commute
Ii drive if it suits the journey more than cycling or walking
Caring responsibilities
Unreliable bus service
I don't drive but am a passenger or taxi user.
Personal fitness.
Irs easier due to my disability
I can't drive
Shopping by bike only works for smaller quantities
I do not own a car and can’t drive
I can't depend on public transport to get to work
Public transport does not always provide for my needs
Lack of buses where I live
My job times dictate this
Hard to answer for an organisation but all the above have been mentioned. Disabled people often have more equipment to cart about and using a car (often through Motability) is the most convenient and often only realistic option for families. Its not a question of a car being "more suitable" is is often the ONLY option - especially if the car has been adapted. There seems to be an underlying assumption here that using a mutability car is somehow optional! Even if the person does not have such a car, if you are a family with a child with additional needs it is usually very much easier to travel in. car together - some children can be very difficult to travel with on public transport - but getting DLA or PIP takes a while.
When not working, public transport can't be relied upon to turn up and that makes me feel vulnerable at night.
Do not drive anymore
The bus services have been reduced and I have to walk 30 mins from my house to get a bus to Leeds, Huddersfield, or catch more than 1 bus as services cancelled meaning it's not cost effective paying for 2 or 3 buses to get to say cleckheaton which is 15 minutes in the car
Buses aren't reliable
Car sharing hasn’t been set up locally

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Concentrate on fixing roads and making buses more frequently in/ around rural locations.
More electric buses, more buses in evenings and on Sundays, more buses travelling across region rather than having to go into Huddersfield and out again on another bus.
How about educating drivers (and cyclists) on driving/riding safely and sharing the road instead of creating inconsistent cycle ways.
Be more connected to outlying districts, towns and cities.
The price, reliability and frequency of public transport to Scholes and also school bus transport is unacceptable and makes it impossible to rely on it.
Cycling routes in come valley would be good, also more reliable buses and trains would be a great addition
Frequent, reliable, cheap public transport, and improve facilities for cycling.
Need an integrated transport system - bus and rail. Proper and reliable rail connection to Manchester ,Leeds, York. Descent easy to understand price structure for tickets, which are not outrageous in price. Conditions of the roads need addressing asap.
I would like to be able to rely on public transport to get to work and for changes to meet up. I would like public transport to provide enough seats to travel comfortably and with dignity. I would like a better timetable for public transport to allow me to get home after a night out, and to get to Church on a Sunday morning. I would like better public transport links to other areas in Kirklees.
Good, clean, reliable, punctual transport needed. when abroad it is so simple and one very reasonably priced ticked enables you to travel on good transport and within walking distance to a local depot. Abroad I would not consider driving - here, I am lucky to see a bus!
The bus station feels dangerous at times now travelling as a single woman. The bus service in Kirklees like other areas in the UK often suffers cancelled buses.
Improved train and bus support is essential. As a Marsden resident, it is infuriating that the faster 185 has been replaced by the slower 383 (previously 183), and it's regularity (and the regularity of the 184) is really poor, bus service to Marsden needs improving. In addition, the lack of a direct service to Leeds (which ur has previously had) is incredibly frustrating, as it increases my commute by around 15 minutes one way, which is 30 minutes a day and several hours a week. Marsden and Slaithwaite are big places, and deserve a direct link with Leeds.
Good infrastructure for E bikes and scooters could eliminate much of the damage that cars contribute to climate change by replacing cars for short commuter and retail journeys.
I use buses first thing in a morning,i have a good 20 mins walk to catch the first bus in a morning,which for a lady isnt good at 05.15 in a morning when its pitch black. I also want to mention that i finish work at 8am and almost every morning im stood at bus stop in Lockwood with all the buses going past full with all the students on them,its ridiculous,there either needs to be more buses for the workers or school buses put on just for the students Sometimes im waiting a good 20 mins plus before i can get on a bus or i have to walk into town.They're all crammed in with there faces squashed against the doorwhich has to be a safety risk surely.
More reliable bus times and to run longer in the evening
The pressure to get everyone cycling does not account for people with babies and children and old people who are not fit enough to cycle quite a large proportion of the population
Public transport that actually works
I don't believe the rise in speed bumps do much for the environment. Bike theft is huge. There is not enough bike storage in Huddersfield centre to risk cycling to and from there.

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Direct bus to Wakefield via Shelley. More frequent buses from Shelley to Huddsf'd
I would just like services to run according to the timetable. I take thetrain from Marsden to Manchester most weekdays fo work and it is almost always late arriving in Manchester and often late arriving in Marsden. It would be great if the timetable could be relied on. Also if trains ran later at night and it Marsden station was accessible for the disabled/people carrying heavy suitcases.
We need a regular bus service. I live in Hunsworth and the bus service is nonexistent. To get a bus to Leeds for example I either have to catch a bus to Cleckheaton and change there or walk over a mile to Birkenshaw.
Make the flow of traffic better of possible. To encourage other forms of travel apart from cars to ease congestion and pollution
Better Transport Links to Neighbouring cities, more frequent and reliable. Better train services so it doesn't take twice as long travelling to places compared to using a Car.
Where I live the buses are infrequent and at times u reliable. I am partially sighted and am reliant for reliable buses to get to NHS appointments and I have been let down by missed / late buses. We need more frequent and reliable buses certainly serving Honley village where I live.
Improved reliable well connected public transport. Less congestion and better roads.
First world quality of roads instead of decades of neglect. Public transport is rammed down taxpayers throats and continually fails to deliver.
Quick, frequent train connections around West Yorkshire, into Manchester and South Yorkshire.
I would like more buses in places like outlane which has one bus an hour, always late and often doesnt turn up. You can't go anywhere really due to the lack of service. Disabled people and people who work outside of kirklees NEED to use a car. Dont' assume everyone can use public transport!
To keep fare prices as low as reasonably possible.
Many side roads in my area are in atrocious condition
too much talk not enough action
It would be great to see more cycle lanes for young people and people like me who are too scared to ride bikes on the busy roads. It would also be good if cycle parking were near to the main shopping areas and there were more places to park bikes so that you can make trips to multiple stops and keep your bike close.
As many options as possible
Fairer access to buses from the WYCA and not providing a monopoly to private bus companies to transport children to school in Halifax grammar schools from the Huddersfield area.
One off roaming charge to travel anywhere all day every day 7 days a week
Public transport needs to cheaper, more reliable and have better information and updates. The recent rail upgrades have caused many people to go back to using the car because its just been an unreliable mess.
No, my feed back won't, because you've already made your decision. We live on the edge of the Pennines, with massive hills and you think cycling is the way forward. We sold off the transport system. Ever since then it's been run down and asset stripped. Stop throwing money down the drain. Nationalise it and we will have the type of service I remember once again.
Get public transport to work for all ans stopp the poor service.
Buses and trains running on time - with zero cancellations. Permit use of senior bus passes prior to 9.30am and remove all other use restrictions, for both bus and train travel - thereby combatting loneliness and isolation and better promoting social connection opportunities.

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Trains and stations need to be more accessible for those with disabilities and families with prams. To encourage commuting by train free and plentiful parking should be offered at stations.

Better integrated rail bus routes. More flexible use of smaller minibuses. Most bus routes transport fresh air for most of the day. Shorter bus routes say Dewsbury to Leeds would have two sections. Dewsbury to white rose then White Rose to Leeds

Make it easier to get to places by car without endless road closures/road works and diversions not to mention potholes. Also make more parking available in town center

Make it safer for people to get from one place to another without having near misses with traffic going through lights at red. Get the buses to be on time abs don't make excuses. People's livelihoods depend on public transport being reliable. I would consider taking a bus but feel unsafe in even standing at a bus stop these days and with heavy delays or cancellations on top of that we are all vulnerable in a situation that isn't out doing.

Better roads and infrastructure, more thought about car drivers and the state of the roads we use. The fact that some people like to travel alone in a car and don't want to more flexibility that cars give them. The transport network in the uk is atrocious compared to Europe and other countries. It is unreliable, and expensive, this is not something that Kirklees can change it needs a uk wide overhaul, significant government investment and time spent engaging with the people that use it.

There os no direct bus rout from mirfield to brighouse, cleckheaton or wakefield. Cycling inferstructure is very poor, and pavments are not all well maintained. I work in brighouse and cycle the longway dude to lack of safe routs. I would like a path along the canal to run through to brighouse and the path along wakefield road to be cleared as it is too full of debry to safely walk.

A service which concentrates on the areas of North Kirklees which is reliable and and more extensive.

There does not seem a belief that for disabled people, the only way to get around and be independent is using their own car (especially when this is through Motability due to their disability). Moving to a hierarchy as you describe that pushes car use down to the bottom suggests that disabled people are somehow "at fault" for their choices. Secondly there is absolutely no mention of school transport which is used to transport many disabled children to school. Is this now considered "not green" and should not be supported? It is next to impossible to transport many disabled children otherwise. Council's own post 16 transport policy regarding children with SEN gives a personal budget which means many extra car journeys are now being made - doesn't seem to sit sensibly with this policy. This is not to say that better more accessible public transport would not be welcomed - we have members who do not drive and having better transport and better pavements with dropped kerbs etc in the right place is important. Members also report having appointments at hospitals when they could be more local to them - are you working with health on this aspect? Finally members whose disabled children do use the bus services do worry about anti-social behaviour at the bus station (Huddersfield) and very rowdy behaviour on public buses at school times. And this survey is impossible to complete as a group - including the age/sex questions as I'm not completing this as an individual

Bus service less last minute cancellations,whemy it works it's good

Fix the rail system, its horrendous. Never known anything like it, can NEVER rely on it and truly can't remember the last time a journey played out as originally planned. ALWAYS delayed or cancelled. Its an embarrassment

Accessibility and availability for my family to use. I am disabled and my son has autism, the extended journey times on buses make them too difficult to cope with as a family.

Heckmondwike need more buses on time, and not just leaving passengers standing several times a week.

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Size of population in local area within Kirklees have increase with new housing and the roads are being made narrower, this is making congestion worse. Road infrastructure should be part of any new housing development along with schools, doctors and dentist. Increasing the wide of pavements and reducing the size of the road is not the solution. Having more parking spaces where shops are would reduce the amount of street parking. Speed calming measures also need looking at, due to the size of some of the 'road humps' are damaging personnel vehicles and bikes.
Hunsworth has no bus route anywhere after the first run. We have to walk / drive to Cleckheaton bus station or to Birkenshaw to get anywhere. Not acceptable when you are 84
Safer cycle routes that join up and don't disappear on the road. People don't want to ride on the road as it can be terrifying and I am a seasoned cyclist and instructor. Our participants won't ride on the road alone because they are scared. Cycle paths must be planned to get people to the main roads so that cycling can be a method of transport that can replace the car. Routes close and stay closed for years with no viable alternative. This would never happen if a road was closed to motor vehicles. Thought is needed as to how other forms, eg., scooters are going to work with all means of transport. Where is it safe to scoot? On-road, on pavements or in cycle paths? Not an easy issue, but scooters in cycle paths could push cyclists out on to the road when overtaking and could be an issue. On paths - reasons for not having them there are obvious. On roads - could be collisions as scooters already seem to come out of nowhere. Transport of the future needs to be able to cater for all forms of transport and that might mean taking space away from motor vehicles or making more less used paths multi use - for bikes and scooters if there is room.
Better public transport infrastructure rail bus routes or local tram service that is cheaper and reliable
More frequent evening services. Flat fare.
Make it easier for thise with additional needs to travel safely.
Regular busses running on time.
For walking & cycling to be seen as normal things that everyone should do
Many forms of transport do not integrate with each other. Eg buses don’t connect with train arrivals and departures. There are still examples of train stations which are not accessible to several groups (people with disabilities/mobility issues, parents with pushchairs) who thus cannot access rail services.
Support for disabilities
Restored bus service from Hunsworth to Leeds. Traffic free cycle route from Spen Valley into Leeds.
Improving all of the cycle routes, greenway links and noting areas of which there are steeper inclines, families are less likely to use as children struggle. Public footpaths that could become multiple use would help navigate away from busy routes. Family friendly routes like transpenine trail we drive to for safer enjoyable family cycling. Some areas of greenway modified but more needed for families to enjoy. There is no safe cycle bike hub in the town centre that we feel is secure enough to warrant leaving bikes to spend time using town centre amenities. Manchester and Leeds have secure hubs. Chaining out in open doesn’t feel safe enough. Public transport bus system less frequent in rural areas. Unreliable at times. Local train network is good as long as can travel to local station such as mirfield and park car. Again no bus service where I live to commute to train station without heading to Huddersfield centre adding to journey time
Cheaper public transport
Traffic through ravensthorpe and dewsbury are always bad and not even just through rush hour. Too many people pulling up at the side of the road to use shops and many side streets just causes a lot of traffic. Obviously it’s then worse during rush hour as the traffic can only be directed one way to get to mirfield. Traffic routes out of mirfield are very congested during rush hour which makes it difficult for commuters especially travelling to Leeds.

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I that if you want people to use public transport you need to put services back on. I used to be able to get a bus to Halifax from Batley when I moved here. I regularly used to use this service. Now I have to get a bus to heckmondwike then a bus to cleckheaton to get a bus to Halifax.

Poorly planned roadworks is what causes traffic and pollutions. Roads are littered with illegally parked vehicles on double yellow lines all around Kirklees, not the centre but no one enforcing these rules or fining them. Parking on double yellows causes bottlenecking and congestion which again, causes more pollution. Auto electrical lab on the corner of thistle street are ridiculous. Shama and rajas litter flint street, the Kurdish corner, wood house hill, the list is endless.

We need reliable public transport. We dont use it because its so bad and we no longer have a bus to get us to the bus station. We used to drive to cleckheaton and pick up a bus to leeds or bradford for onward travel but parking charges have stopped us doing this. Driving is also a nightmare due to traffic cingestion in west yorkshire. There is too much emphasis on tryung to get people cyclung. We have an aging population and cyclings not an option if youre trying to get children too and from school etc.

.

We need more regular and reliable bus services. Some if us may be old but we still like to get out and about and know that we can get back.

For me as a pensioner, I would like the reinstatement of the 342 bus in the afternoons. This service stops at 2.00pm which is ludicrous. There are lots of older people like myself who would use this service if available.

Behaviour change - influence leaders and general public eg the standard response to mentions of places is "There's nowhere to park". Influence businesses/planning applications to make travel plans and to implement them.

Better buses more reliable more buses early in the morning. We are a village with only one bus an hour not good enough and they are not reliable it's disgusting how arriva gets away with how they run this service

Make bus travel more reliable with less cancellations and better routes

I am over 60 and when I eventually get a bus pass more likely to use public transport more. So bring the age of bus pass down.

When the bus "disappears' from the display in Hudds bus station there is no apology or explanation. Sometimes it then randomly DOES turn up, sometimes not. But the passengers are just left to hope/guess as there is no info or help. Improve the departure displays. If First Bus just decide not to run a scheduled service then Metro should be making damn sure they get penalised for that - currently no-one seems to care so they get away with it.

I just quite simply want the bus to turn up, I don't drive, so I rely on public transport to get about, stop making excuses about not having drivers, Tracy Brabin needs to start working for her extortionate salary.

Please do something for me I am rebirth of Dewsbury 28101985 I support rebirth was dewsbury I am mental illness enhanced disabled who is with autistic I am using bus all my xp for 40 years

Increased bus services in the evenings and weekends

Please provide more local bus services between our various villages. From Meltham, bus routes have been withdrawn. They need to be reinstated and more provided.

Stop hating car users! I avoid Huddersfield town centre thanks to the car hating system in place.

To get the buses running on time

More links to other local villages. Better buses.Seven days a week services.

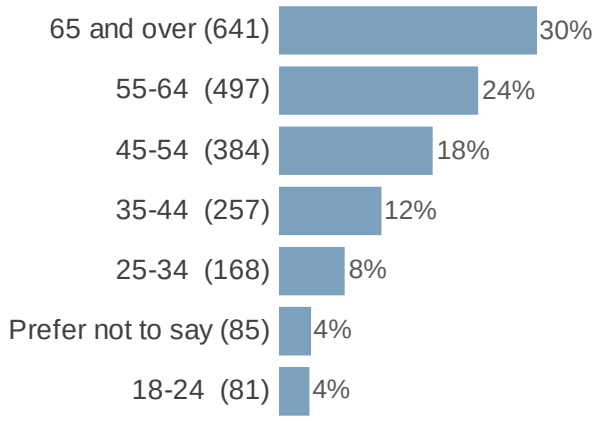
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Put a reliable bus service that passes Hunsworth that goes to Leeds, Bradford and Halifax
I do not want to be ostracised for choosing my own transport or fitting political decisions or agendas.
When you live in the Pennines, unless you are an athlete, regular cycling (even if infrastructure exists) is impossible with a normal bike. Buses to rural villages are infrequent and limited hours which makes them difficult to use regularly. TransPennine train reliability is appalling so I've stopped using train and drive instead. These problems need fixing before I'll consider using more sustainable modes.
I would like to see bus conductors on buses again to support passengers, the driver and to promote the service making the journey an enjoyable experience rather than something to be endured.
To get the buses to run to time table they either dont show up or there very late
The bus service 200 and 254. Aps says bus on time , then bus dosnt show cancelled buses sometimes back to back
I'm pleased to see joined up thinking in the plan like car clubs at transport hubs. Better links between valleys would be invaluable, we only have a minibus service to the Holme valley a few times a day which means for trips to the supermarket or dentist etc, we have to drive
Cheaper fares
Reduce carbon emissions, Improve air quality, Increase active travel. Dedicated cycle lanes (separate from traffic). Increase public transport use (more available, lower cost, safer, better information - real time info at stops, and better waiting environments that protect you from the elements and have safety features). Discourage single occupancy car use on ICEs (don't give away free parking and make it more attractive to drive - reward the wrong thing). Provide more support for EVs - charging points, discounted parking, priority parking etc so that if people do have to drive they can pick an EV. Provide support for people that do need to drive - I don't want to see car travel promoted but I do want to see people with disabilities or no other option to be supported. Encourage remote working, flexible working hrs, working from home to reduce car travel in peak hrs (people do not need to drive miles, creating pollution and congestion, to sit behind a screen they can sit behind at home).
I would like fewer cycle lanes. Very rarely do cyclists use them.
New electric buses like other cities in the UK
Make bus lanes available to hgvs as there on timed deliveries and have more road sense than car drivers and have. More patience than car driver,
If buses more regular and on time, maybe use them more, at present nearest bus stops quite a distance from my home I do use trains for longer trips
Improved timetabling to link Denby Dale buses to the station e.g. so you can catch the bus to go to the station then into South Yorkshire. More bus routes to better connect local towns. An bi-hourly bus service is almost pointless. Cheaper fares for trains too expensive for a rubbish service.
More direct and qicker public transport links.
id like the bus services to and from Heckmondwike in particular the services 201 and 229 to be more consistent and and not cancel all the time. the amount of money i have had to spend on taxis getting to and from work in the last year because of buses cancelling is ridiculous and i really cant afford it!! bus fares also bus fares need to be realistic and affordable! i pay 2.50 on a short single journey that is about a mile (heckmondwike to Batley for work) and its the same price to travel about 10 miles (from heckmondwike to leeds) on the same bus it makes no sense to pay so much for such short journeys!

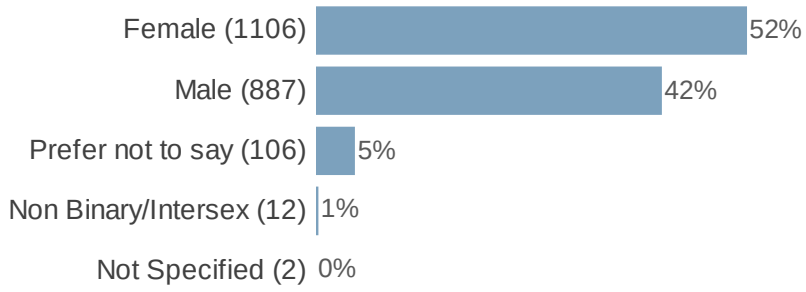
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As someone who regularly used the rail infrastructure I am excited about the TRU. However, there needs to be three electrified lines through from Marsden to Huddersfield to give Marsden and Slaithwaite at least half hourly services during the day. Having an hour wait between services reduces people's desire to use the train, especially if there have been cancellations. Stations also need to become fully DDA compliant as neither Marsden or Slaithwaite are suitable for the modern world. The cycling infrastructure within Kirklees is very poor compared to nearby areas such as Leeds or Manchester or even Wakefield. The routes do not join up properly, and just throw you out onto roads. This is not just due to the TRU impacting one of the routes at Deighton. I suspect that the people who design these cycle routes have never used them and do not understand the difficulties of being a cyclist in an urban environment.

How old are you?



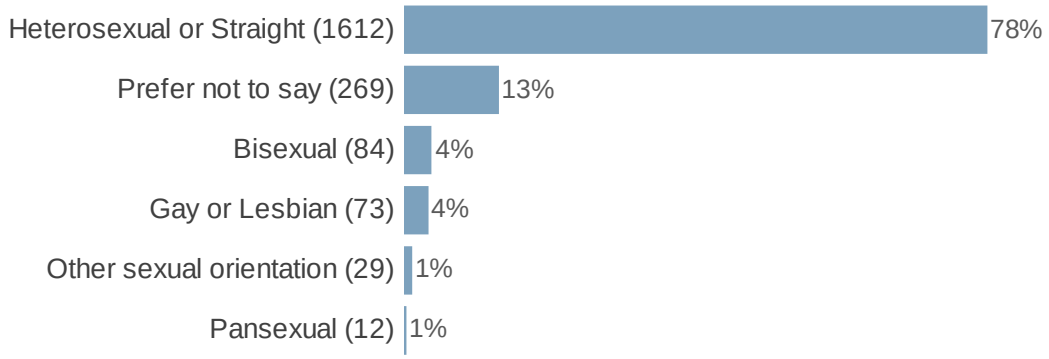
How would you describe your gender?



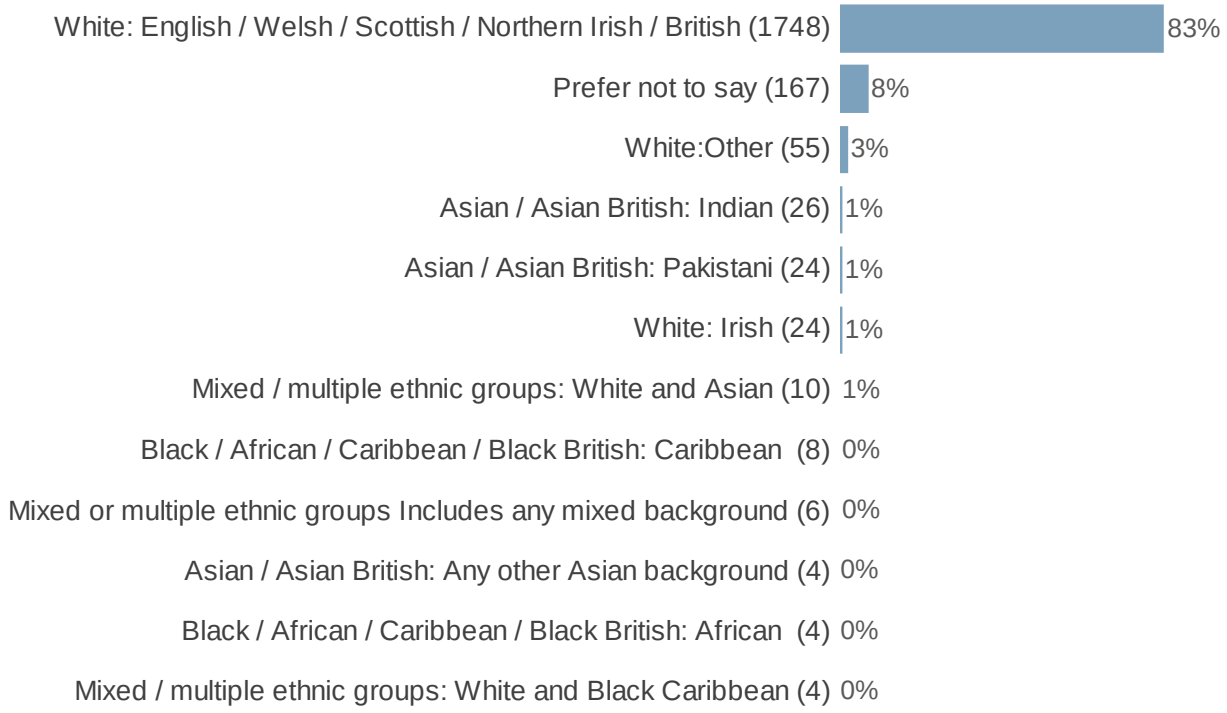
Is your gender identity the same sex as you were registered at birth?



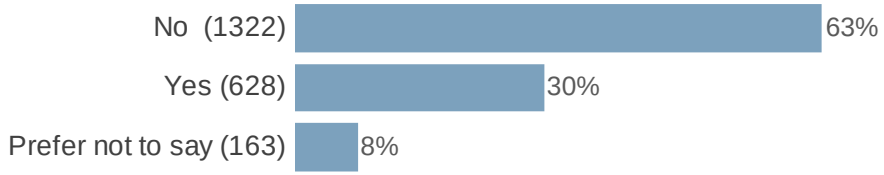
Which of the following best describes your sexual orientation?



What is your ethnic group?



Do you consider yourself to have a disability and/or long-term health condition?



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Campaign Evaluation- Transport Survey 2025

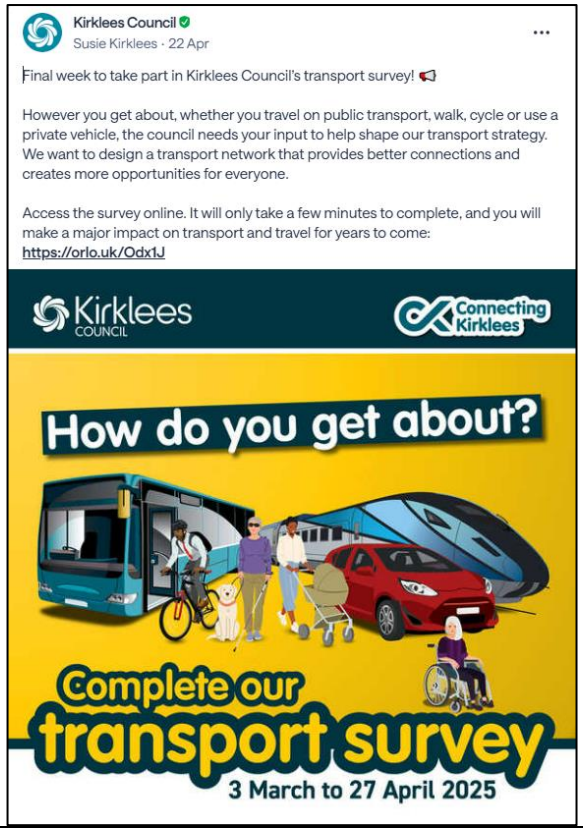
Channels:
Paid for advertising? If yes, please tick below.

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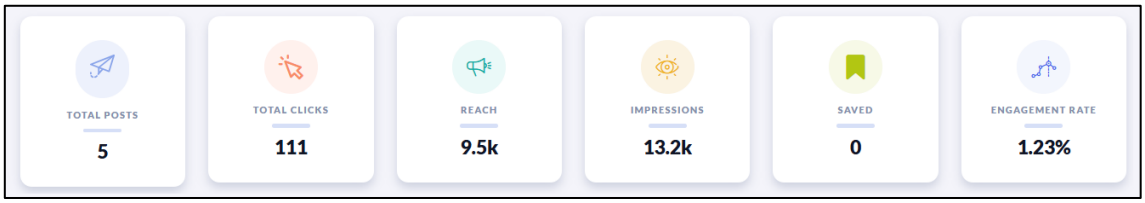
Organic results

Preview:

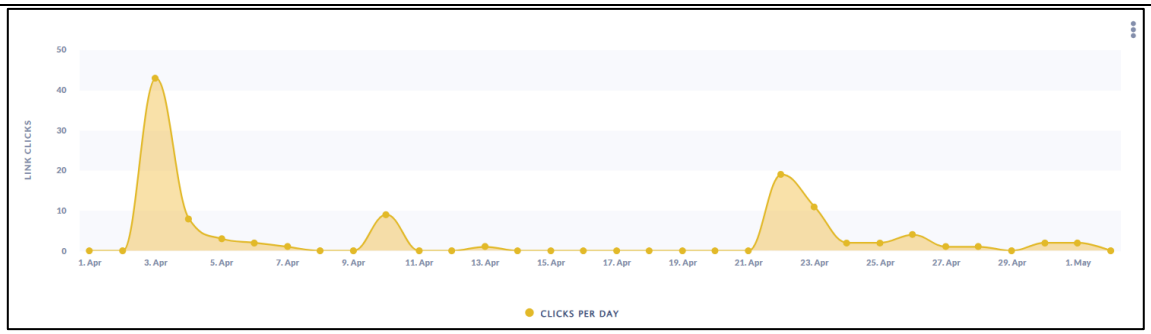




Results Overview from Orlo:



Link clicks:

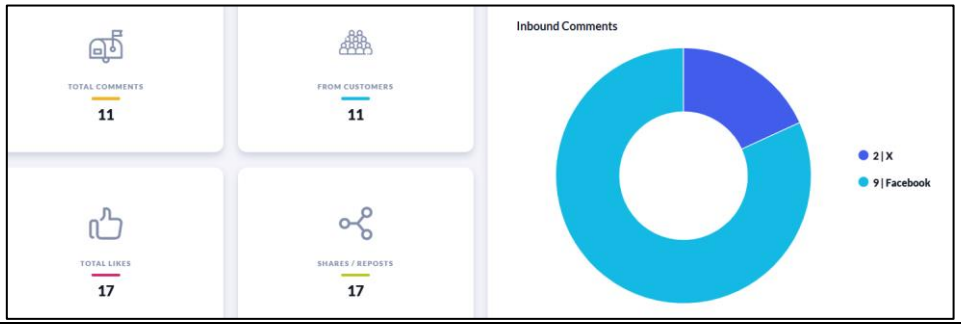




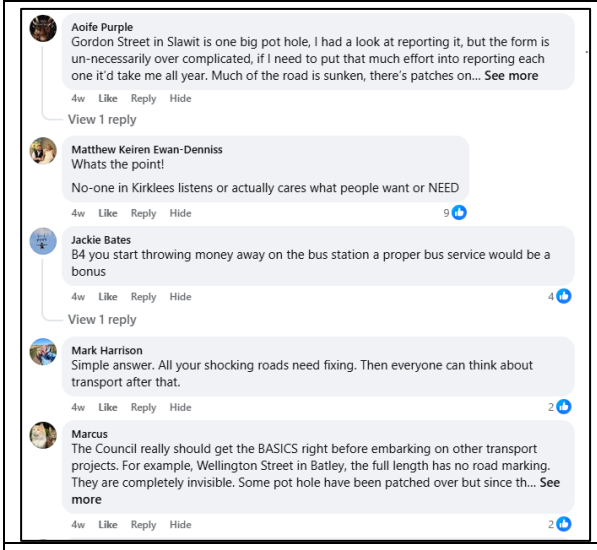
Impressions: 13,202

Reach: 9,499

Engagements:

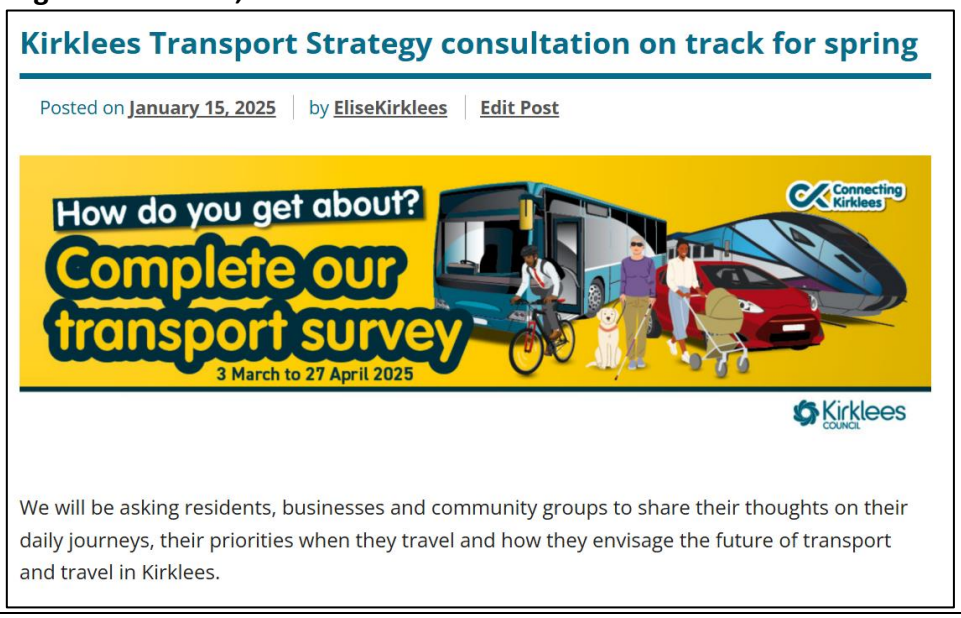


Inbound comments:





Kirklees together views: 1,126

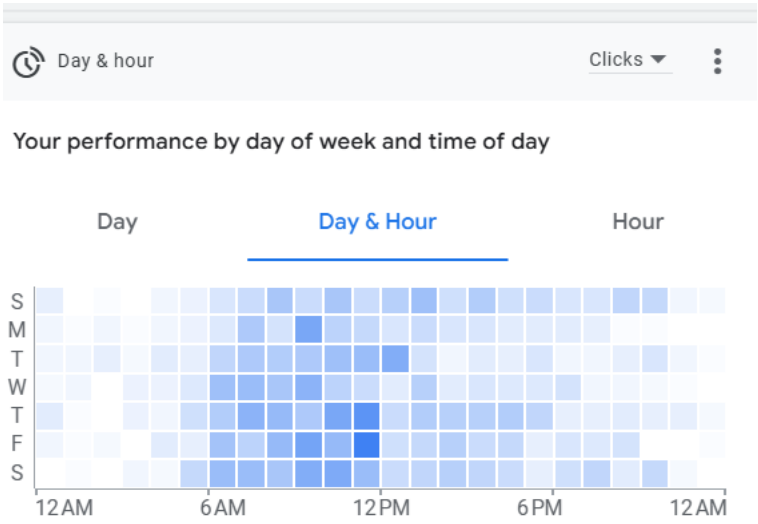


Overview and results:

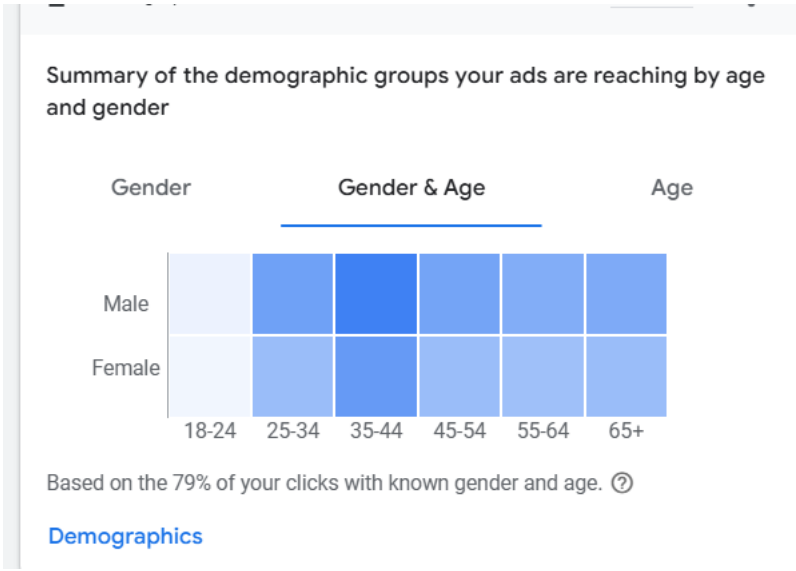
Results:
Overview



Performance times



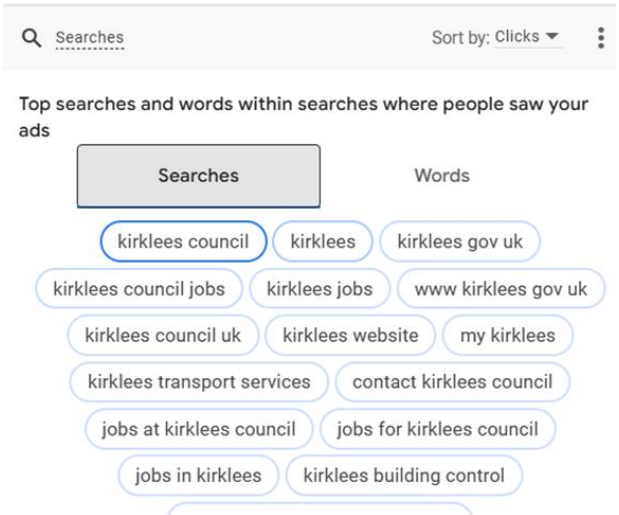
Demographics



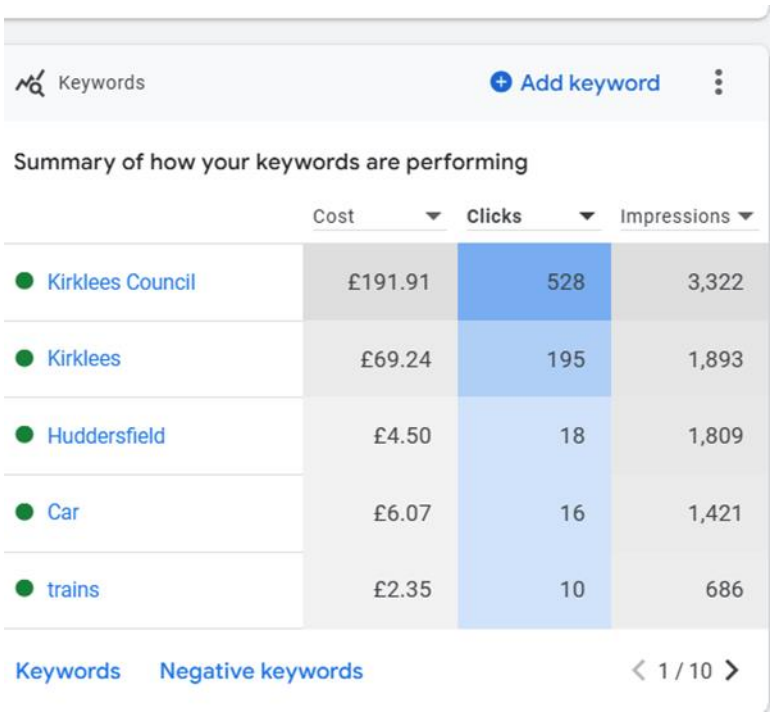
Locations

Targeted location	Bid adj.	Clicks	Impr.	CTR	Avg. CPC	Cost
Heckmondwike, England,...	–	208	1,637	12.71%	£0.28	£57.89
Mirfield, England, United ...	–	30	483	6.21%	£0.18	£5.47
Batley, England, United K...	–	29	281	10.32%	£0.21	£6.13
Dewsbury, England, Unit...	–	25	425	5.88%	£0.23	£5.86
Cleckheaton, England, U...	–	12	169	7.10%	£0.29	£3.54
Liversedge, England, Unit...	–	12	121	9.92%	£0.20	£2.34
Birstall, England, United ...	–	4	432	0.93%	£0.06	£0.25
Gomersal, England, Unite...	–	3	41	7.32%	£0.27	£0.80
Total: Locations		323	3,589	9.00%	£0.25	£82.27
Total: Campaign		1,569	81,278	1.93%	£0.26	£402.29
Total: Other Locations		1,246	77,689	1.60%	£0.26	£320.01

Top searches



Keywords



Notes

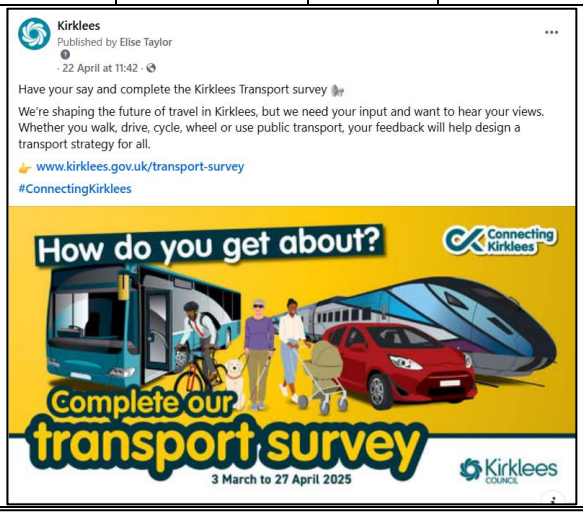
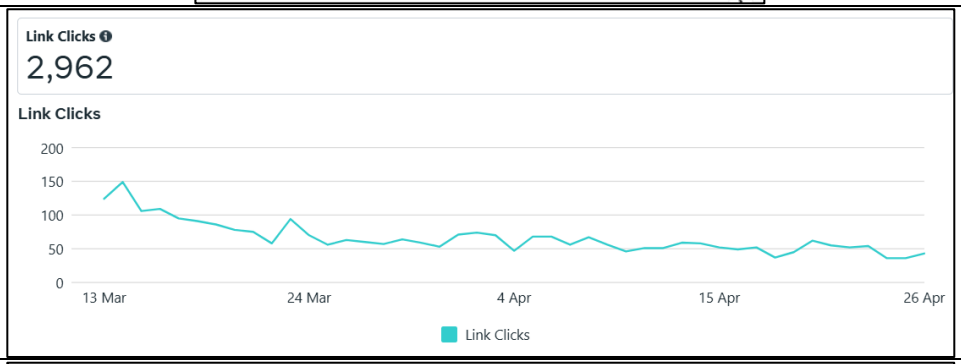
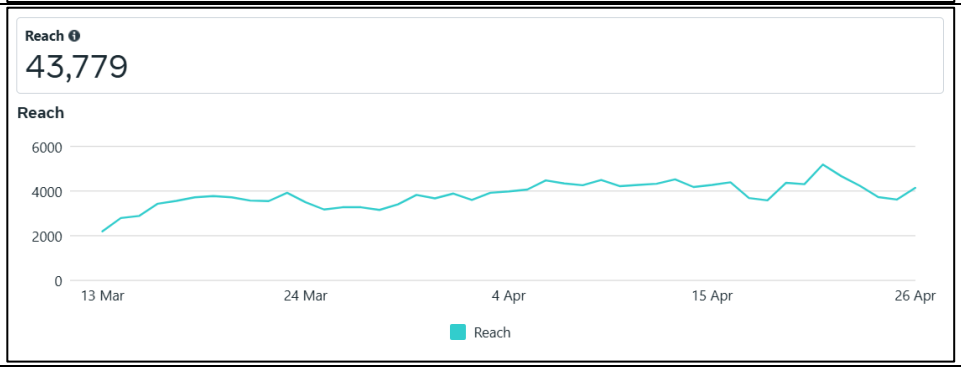
The campaign delivered 1,570 clicks and a total of 81,300 impressions, resulting in a total spend of £402 and an average cost-per-click (CPC) of £0.26. Performance peaked mid-month before experiencing a noticeable decline in both clicks and impressions toward the end of the month, suggesting a potential drop in audience interest or ad visibility. Analysis of time-based performance revealed that weekday mornings—particularly from Wednesday to Friday between 6 AM and 1 PM—were the most effective for generating clicks, while engagement dropped off significantly during weekends and after 6 PM, pointing to a clear pattern in user availability and responsiveness.

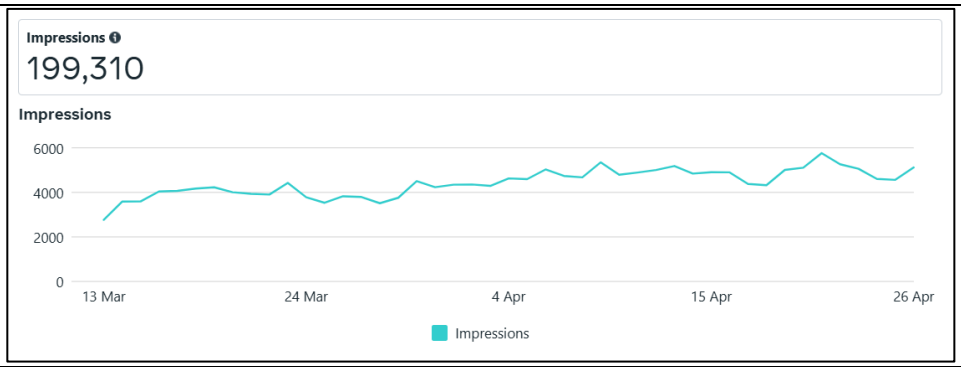
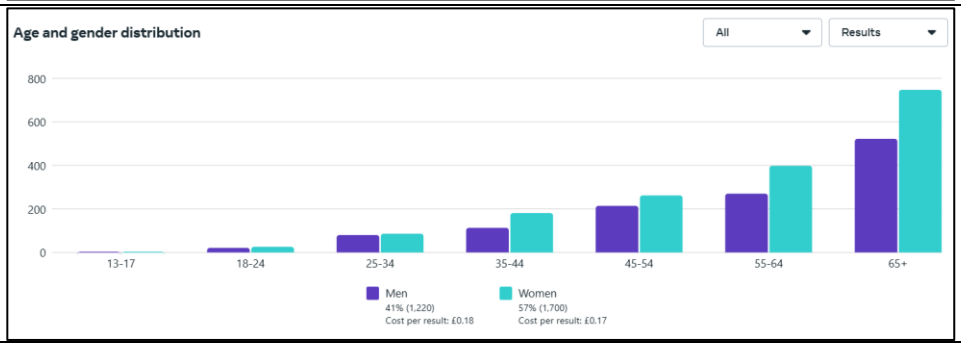
Audience segmentation showed that males aged 35–44 had the highest click-through rates, a standout finding considering past difficulties in engaging this group. Additionally, both male and female users aged 25–64 responded reasonably well to the campaign, whereas younger audiences (18–24) and seniors (65+) remained less engaged. Retargeting efforts in geographic locations with previously low response rates contributed an additional 323 clicks to the campaign's survey component, showing success in refining the campaign strategy.

Keyword performance also offered valuable insights. The majority of searches where ads were shown included the word "Kirklees," highlighting strong regional relevance. The most effective keywords were associated with "Kirklees," followed by terms such as "car,"

"trains," and "Huddersfield," indicating that transportation and local geography were dominant themes driving visibility.

Facebook/Insta Ad

Facebook ads						
Objective	Traffic ☐	Awareness ☐	Engagement ☒	Leads ☐	Conversions ☐	Video Views ☐
Preview						
Link clicks						
Reach						

Impressions	
Demographics	

Overview:

The daily spend for this ad remained fairly steady throughout the campaign, hovering around £10-£11. Overall, this ad generated 2,962 link clicks. Given the budget and localised nature of a transport survey, I believe this is a solid number for the campaign. However, there's a noticeable downward trend in daily link clicks from the 24th March onwards. It previously hovered around 100 link clicks and then tapered off to around 50-60 by late April. Throughout the campaign impressions remained fairly consistent, landing between 4,000 to 6,000 for the majority of the campaign. The consistency here contrasts the decline in link clicks, suggesting potential ad fatigue or diminishing relevance throughout the campaign.

Ad fatigue: The decline in clicks while impressions stayed stable points towards potential ad fatigue. I would suggest in future either changing the ad creative after 3-4 weeks or run a range of shorter ads (3-4) weeks with slightly different creative options.

Cost efficiency: While not drastically different, the cost per click for this ad was slightly higher than similar campaigns we have run. This suggests minor inefficiencies in the targeting or creative. However, this could be linked to the ad fatigue previously mentioned, which would have drastically increased the CPC. Again, I would recommend either running shorter ads or changing the creative to attempt to improve this in future campaigns.

Spending efficiency: The budget allocation stayed fairly consistent throughout this campaign, but the performance of the ads declined throughout. This would suggest an opportunity for a dynamic budget in future campaigns, shifting spending towards different audiences or new copy/creative once we see a decline in a future campaign.

Recommendations:

Rotate creative/ run shorter ads: As mentioned above, I would recommend either tweaking the copy and visuals for future campaigns every 2-3 weeks. Or run them as separate ads that run for the same

period. This would help us combat ad fatigue and hopefully maintain engagement for longer within campaigns.

Use frequency capping: Another recommendation would be to use frequency capping for future campaigns of a similar length in which the ad is likely to be shown to the same account multiple times. I would suggest using a cap of 3-5 for an account. This could help us keep the total spend and the CPC lower, allowing us to be more efficient with our budgets.

Test on various audience segments: For a similar future campaign in which we have a range of invested target audiences (Cyclists, drivers, public transport, walkers…etc). I would suggest using the targeting options with Facebook to tailor the ad creative to reach and engage these specific audiences. This could also allow us to see which audience is more responsive to the campaign, allowing us to switch creatives and budgets to ensure we are getting an optimised campaign.

Optimise after early success: Another potential recommendation would be to optimise the ad after the first 2 weeks. Analysing what placements, demographics and time of day are working best and then shifting budgets to target these more rather than keeping the spending flat.

Change CTA/headlines: Similar to rotating the ad creatives above, tweaking headlines or the CTA could enable us to improve the CTR and reduce the CPC. This would also allow us to test what copies work best so we can more aggressively target these in future campaigns. Eg.(“Have your say on local transport” or “Tell us how to improve your commute”)

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Kirklees Transport Strategy, 2025

Kirklees COUNCIL

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Foreword

Welcome to the Kirklees Transport Strategy. The purpose of this document is to deliver a cohesive framework, which will help to realise the ambitions we are working towards as a district and ultimately deliver better, greener and healthier transport for everyone who lives and works in Kirklees.

This is an exciting time for the development of transport in Kirklees. We are at the centre of several transformational schemes like Mass Transit, Bus Franchising and the Transpennine Upgrade, which will bring great benefits to all. I want to capitalise on the benefits these will bring and continue to develop how people move around our district for the better.

Historically, transport strategy and policy in Kirklees has been directed by the West Yorkshire Combined Authority, through the West Yorkshire Local Travel Plan. We will always play a key role at the heart of West Yorkshire, but as a district, we want to go further. There are many aspects of Kirklees which are unique, requiring specific strategy and policy, developed for our district. We also understand that Kirklees faces its own challenges, which can be better tackled through the development of our own Transport Strategy. We will continue to adhere to the West Yorkshire Local Transport Plan, and to work closely with WYCA to achieve our joint ambitions, but the development of our own strategy will allow us to address needs that are specific to Kirklees as a district.

As a council, we have many linked ambitions. If we are to tackle the climate emergency and achieve Net Zero by 2038, we need to take action now. Many of the policies set out in this strategy aim to minimise the impact that transport can have on our environment, through the reduction of harmful emissions and the protection and development of our green spaces. We also know that there are strong links between good public transport, economic prosperity, health and wellbeing.

Reliable, affordable and safe public transport leads to greater opportunities for all, it makes jobs, education and training accessible to many. These benefits are also reflected in communities. Access to good public transport keeps our communities connected and allows us to access the things which are important to us.

As part of its development, the Kirklees Transport Strategy has been shaped by the priorities and opinions of the people who live, work and do business here. Our public consultation received an overwhelming response, with many respondents voicing what they would like the Strategy to achieve for the future of transport in Kirklees. These priorities and opinions have been incorporated into this document, as we believe this strategy should aim to achieve what you feel is important for your district.

Delivery of this strategy will take time and is not something the Council can achieve alone. The strategy provides a clear ambition for what we want to achieve. We will work in partnership with numerous other organisations to lobby, bid for funding or influence investments in order to deliver the actions necessary to realise that ambition.

I believe that together, we can bring real change to the district. We look forward to working with our wider partners and stakeholders to realise a better future for transport in Kirklees, and the benefits that this will bring.



Cllr Moses Crook – Kirklees Council
Portfolio Holder – Transport

The Kirklees Transport Vision

Our Transport Strategy sets out a shared vision for transport in Kirklees and a policy framework to deliver a more inclusive and sustainable transport network, transforming travel options for all.

The development of our Kirklees Transport Strategy is an important moment for our district. The Strategy builds upon the West Yorkshire Mayoral and Combined Authority (WYCA) ambitions to improve transport in our wider city region. The document follows the commitment in our Climate Change Action Plan to produce a district-wide transport strategy to help meet ambitious Council targets to achieve Net Zero by 2038. The policies within this strategy have been derived from consultation and engagement exercises undertaken by the Council, WYCA and specialist organisations on transport and other relevant topics.

The Strategy will be instrumental in realising the Council Vision, enabling the development of sustainable transport schemes and meeting our ambitions for Net Zero to tackle the climate emergency. The Transport Strategy sets out our position on transport policy and supports the development, investment and implementation of transport schemes, rather than define individual scheme details. It adheres to national, regional and local policies, including policy objectives and targets contained within the current West Yorkshire Local Transport Strategy and the upcoming West Yorkshire Local Transport Plan (LTP). The strategy's policies will support Kirklees to deliver these West Yorkshire-wide targets within our district.

Our vision is for travel in Kirklees to be sustainable, healthy and accessible to all, creating safe, thriving places and connected communities.

This strategy has been informed by analysis of an evidence base and views collected during our consultation on the draft strategy.

We want to develop a joined-up network that puts active travel and public transport at its heart. We want you to be able to choose what you consider is the most suitable mode of travel for your journey and have multiple transport choices over and above the private car. If you need to go to the local shop, we want you to have the option to be able to walk or cycle in a safe and pleasant environment. If you need to get from your home to work, we want to ensure that you have reliable, affordable and well-integrated public transport which gets you to where you need to go on time and in comfort. **The availability of different travel options is the key to improving connectivity and accessibility across Kirklees.**

Success of the strategy will be determined by the implementation of these policies in our decision making, investment pipeline planning and scheme delivery.

Kirklees Transport Vision: Travel Hierarchy



Healthy, affordable and sustainable travel should be an easy choice, with inclusive transport accessible and available to everyone.

We want to ensure that everyone has access to a range of travel options, so they can safely access goods and services, in a way that suits their lifestyle and budget.

The ability for people to access jobs, services, leisure facilities, open spaces, education or visit family or friends should not be determined by their economic status or whether their household owns a car. We want to improve connectivity in Kirklees, so you can get where you need to be easily. Relieving the pressure on our roads can make our streets safer and more oriented to people, whilst improving journeys for those who do need to drive, reducing congestion and improving local air quality.

This includes improving the environment, streets and spaces in our district, improving daily life for Kirklees residents, businesses and communities.

The bigger picture: Key Strategies and Plans

Our Transport Strategy sits alongside existing local, regional and national priorities and plans. The Strategy meets the needs of local people whilst reflecting ambitions for the region and country more widely. We have worked with partners to produce objectives and policies with shared ambitions.

Kirklees is one of five local authorities which form the West Yorkshire Combined Authority (WYCA). WYCA has a set of statutory duties for public transport, operates a number of transport facilities and services, delivers capital transport programmes' and works with the districts on the delivery of capital transport programmes. This includes actively seeking investment from the government and other sources to fund transport projects such as bus, rail, active travel and highways. Our transport strategy must work in tandem with the policy and strategy of WYCA, helping to achieve our shared ambitions.



Dewsbury

Kirklees Council Local Plan (2019)
Kirklees Council Priorities (2023)
Kirklees Council's four partnership strategies: Kirklees Health and Wellbeing Strategy, Inclusive Communities Framework, Inclusive Economy Strategy and Environment Strategy

Climate Change Act (2008)
The Sixth Carbon Budget (2020)
Decarbonising Transport (2021)
Kirklees Climate Change Action Plan (2022)

Connecting People: A Strategic Vision for Rail (2017)
Long Term Rail Strategy (2018)
The Integrated Rail Plan for the North and Midlands (2021)
West Yorkshire Rail Strategy (2024)
Yorkshire's Plan for Rail (2025)

West Yorkshire Transport Strategy (2017)
TfN Strategic Transport Plan (2020)
West Yorkshire Connectivity Plan (2021)
Connecting Communities: The Socially Inclusive Transport Strategy for the North of England (2023)

Taking Charge: The Electric Vehicle Charging Strategy (2021)

Bus Back Better: National Bus Strategy for England (2021)
West Yorkshire Bus Service Improvement Plan (2024)
National Bus Strategy: Bus Service Improvement Plans (2024)
The West Yorkshire Franchising Scheme for Buses (2024)

Kirklees Local Cycling and Walking Infrastructure Plan (2019)
Gear Change (2020)
The Second Cycling and Walking Investment Strategy (2023)

The bigger picture: Key Strategies and Plans

Our wider Council Vision guides our strategic planning and decision making, and the shared outcomes describe the impact we want our plans and actions to have. In supporting our shared outcomes and vision for Kirklees, we have four partnership strategies which complement each other and our Council Plan, covering the environment, economy, health and wellbeing, and inclusive communities. Our Transport Strategy will help us deliver the council plan by giving decision-makers a defined policy position on transport matters, helping influence future investment decisions, and delivering schemes on the ground.



Calder Valley Greenway





Dewsbury Railway Station

Where we are now

Where are we at?: Key Kirklees Statistics

Almost a quarter of Kirklees households do not own or have access to a car. In areas such as central Batley and Dewsbury more than half of households don't own a car[3]

We have an extensive network of greenways that span our district, **1,100 km of Public Rights of Way** and 4 routes on the National Cycle Network

In 2024, WYCA announced its plan to franchise the Bus Network across West Yorkshire, with Kirklees set to receive a franchised service from 2027.

There are **15 rail stations** across Kirklees, **9 are step free**[2]

60% addresses in Kirklees are within 400 meters of a bus stop which serves high-frequency services[5]

36% do not chose to walk for travel at all during a week[1]

63% of vehicle distance travelled in Kirklees is not on the motorway[7]

We have 27.5 electric vehicle charging devices per 100,000 people[6]

On average residents of Kirklees have slightly shorter journeys to work than the England average. 20% of commuting journeys are under 2km[3]

More people commute out of Kirklees to centres such as Leeds, Bradford, Wakefield and Calderdale than commute into Kirklees[4]

% of car trips to work that are **under 10km**[3]



Kirklees 51%



England 45%

53%
Drive to work[3]



Kirklees

Minimum journey time to 8 key services[5]

10 minutes by car

14 minutes by bike

17 minutes by bus

1) Currently Living in Kirklees (CLiK) Survey 2021
2) West Yorkshire Rail Strategy
3) ONS Census 2021 (travel to work information for this period was affected by the COVID-19 pandemic and associated changing travel patterns)
4) bus-service-improvement-plan.pdf (westyorks-ca.gov.uk)
5) 2019 Journey Time Statistics - Department for Transport
6) https://maps.dft.gov.uk/ev-charging-map/index.html
7) GOV.UK: Road traffic estimates, Great Britain, TRA8906 and TRA8904: Motor vehicle traffic (vehicle kilometres) by local authority in England, annual (2022).

Kirklees and our neighbours

Kirklees is centrally located between Manchester, Leeds, and Sheffield. All are located within 15 miles of our district boundary.

The current connectivity between Kirklees and these nearby towns and cities is shown in the map on the right. The North's main east-west route, the North Transpennine Line, connects Huddersfield and Dewsbury to major cities such as Manchester, Leeds, Liverpool and York. Less frequent services link Mirfield to Bradford and London; and Huddersfield to Bradford, Halifax, Wakefield, Barnsley and Sheffield.

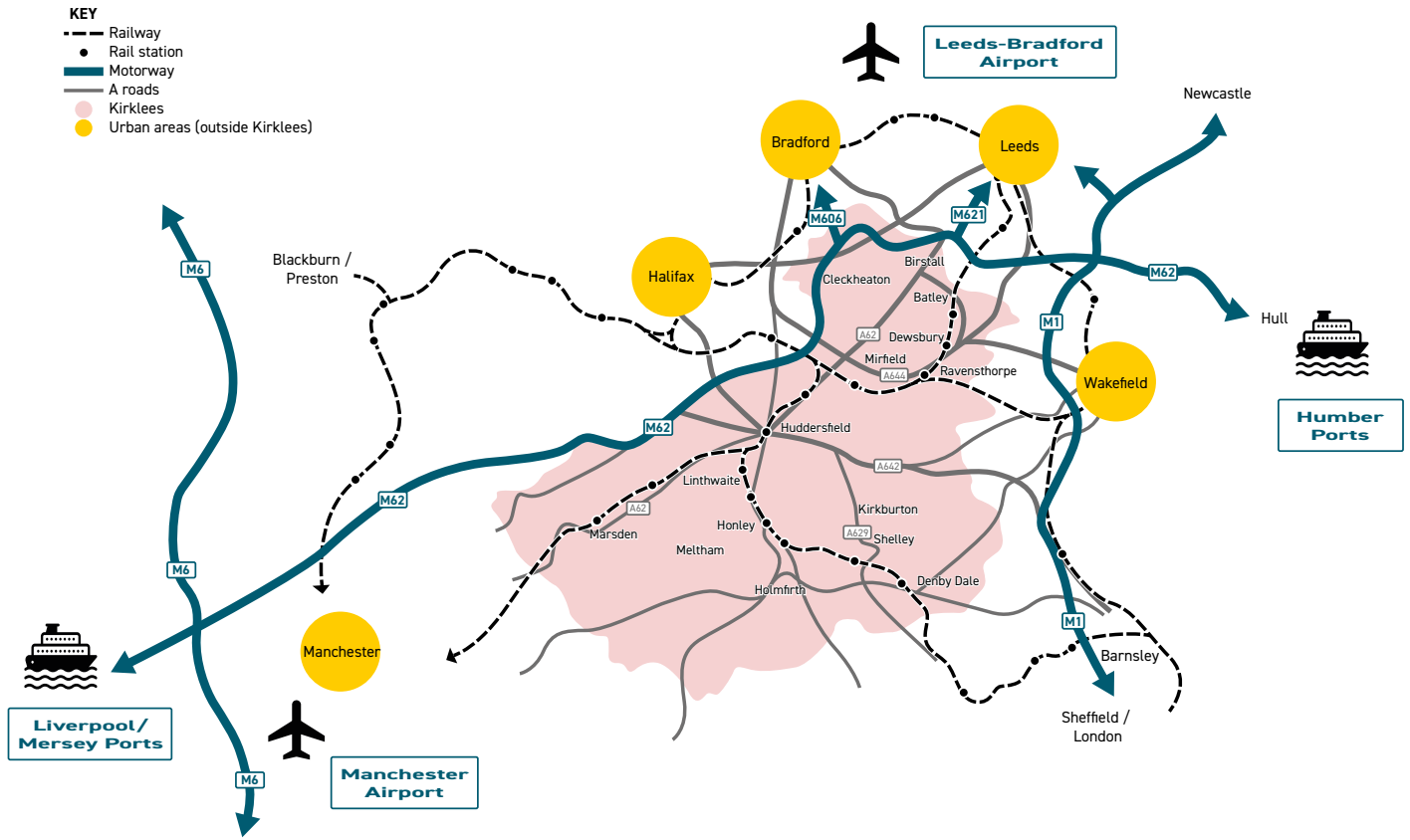
Kirklees is served by several major roads, including the M62 motorway, which runs east-west and connects the area to key destinations like Leeds, Manchester, Hull and Liverpool. The M1/A1(M) motorways, running, provides links towards Sheffield, London and the North East.

Key A-roads such as the A62, A629, and A642 facilitate local and regional travel, ensuring connectivity within Kirklees and to nearby towns.

Kirklees's location at the heart of North's transport network presents opportunities, through proximity to economic hubs, ports, airports and employment markets.

This proximity can support businesses in Kirklees to tap into larger markets. Our location should mean that we can support a diverse labour market with commuting to, from and around Kirklees.

It is crucial that district partners and businesses make the most of these existing links, ensuring that people and goods can move between Kirklees and our neighbouring regions.



We have developed a Transport Strategy that:



Is informed by an evidence base and designed to address our challenges and maximise the opportunities in our region.



Is collaborative and engaged multi-disciplinary teams across the council. We will continue to work with Council staff and partners on the ambitions set out within the Transport Strategy, and how they can help contribute to its delivery.



Is shaped by residents, businesses and visitors, we have taken on-board views and insights from the public and stakeholders in our 2025 public consultation on the Draft Transport Strategy.



Is championed by decision makers, through statutory political process for formal adoption of strategy at Cabinet.



Places people first by prioritising the needs of accessible and safe movement of people around our district and beyond.



Will shape decision-making across the Council, helping to develop, prioritise and implement policy change, infrastructure schemes and bring forward new programmes of work.



Provides a platform for funding to help Kirklees to attract the resources and funding that we need when working with local, regional and national partners.



Holds us accountable - up-to-date information on progress, schemes and priority areas can be found on the Connecting Kirklees webpage, our dedicated transport information channel.



Opportunities for change

Opportunities for change

We have much to be proud of in Kirklees. We know there are areas where we need to continue to work hard and improve the quality of life for all. Kirklees's location presents massive opportunities. Transport has an important role to play in making Kirklees an even more desirable and attractive place to live, work, do business, study and spend leisure time.

Doing things differently can improve our environment, health, economic prospects and the strength of our communities. It is against this background that we need to develop a way forward for transport in Kirklees. Travel behaviours can change. Recent examples include altered rail service patterns, or the impact of COVID-19 on home working or local retail.

Develop our transport network to widen access to opportunities, whether that be jobs or education facilities to help people thrive

Kirklees has the potential to maximise how residents and businesses benefit from Kirklees's accessible road and rail connections and local bus links. Despite this, 20% of Kirklees residents live in areas at high risk of Transport Related Social Exclusion (TRSE). TRSE means access to jobs and services is limited. It can disproportionatel affect young people and those with long-term health conditions and disabilities. Connecting people to employment and training opportunities inside and outside of the district will be key to improving economic participation[1].

Support the Net Zero and Climate Ready Kirklees by 2038 target by reducing harmful emissions from transport and planning resilient, decarbonised networks

If we continue to approach transport as we do now, relying on cars for most journeys regardless of distance, it will not be possible to achieve our net zero target by 2038. Relying on advances in vehicle technology and increased uptake of electric vehicles isn't enough, nor will it help to minimise the forecast future traffic congestion on our roads. We need to make positive and sustainable changes to our travel choices, while understanding that different people and businesses have different needs and requirements. This means taking the bus, train or bike more often, or walking if possible for shorter trips.



Create streets and spaces where people feel safe, happy and healthy travelling around Kirklees

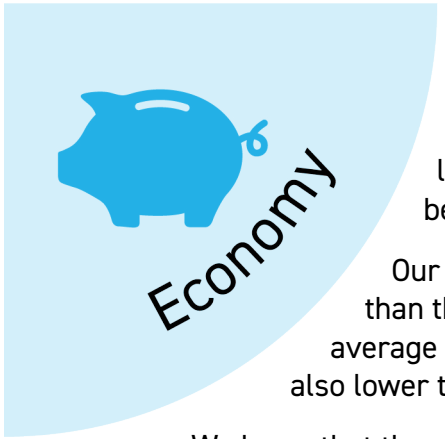
We know that there is a clear link between a person's health and wellbeing and our levels of physical activity. There are many ways we can increase our physical activity levels, and one is rethinking how we travel in our day-to-day lives. An uptake in active travel contributes to a decrease in emissions linked to car use, which can improve air quality across the district. Poor air quality is directly linked to many diseases and lower life expectancy; working to reduce our emissions means we are working for a healthier environment for all.

Capitalise on existing local and regional investment to maximise their impact and ensure more people benefit

The levels of public satisfaction with the transport offer in Kirklees are not as high as they should be; we need to do better. Better public transport and connectivity across the district can strengthen our communities, improving quality of life, and making Kirklees a better place to be.

Sources:
1) Transport-related-social-exclusion-in-the-North-of-England.pdf (transportforthenorth.com)

Challenges: Economy



Kirklees has much to offer, with excellent educational opportunities, good strategic connections to employment centres, and a strong leisure offer – but its potential is not being reached.

Our unemployment rate is slightly higher than the regional and national averages. The average economic value (GVA) of our jobs is also lower than the national average[1].

We know that the current public transport offer can limit the opportunities available to some of our residents. A more connected and frequent public transport system, which gets people where they need to be, for a fair price and on time, will provide benefits for all.

We want to bring people closer to opportunities, whether that be jobs or education facilities. By doing this we can help tackle inequalities, creating a fairer more prosperous Kirklees.

Link to Council Plan Priority: Continue to invest and regenerate our towns and villages to support our diverse places and communities to flourish.

Employment rate (Dec 2023)[1]


Kirklees **74%**


England **76%**

Average weekly earnings (Apr 2021)[2]


Kirklees **£450**


England **£493**

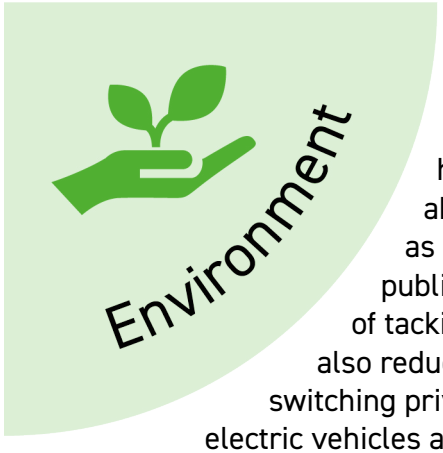
Drive to work


53%

Kirklees (2021)[3]
Compared to 45% nationally

Sources:
1) https://www.ons.gov.uk/economy/economicoutputandproductivity/publicservicesproductivity/articles/productivityintownsandtraveltoworkareasuk/2019
2) https://observatory.kirklees.gov.uk/economy-and-employment/#/view-report/9e93e3faae-4c449084e459fcd86e88d0/___iaFirstFeature/G3
3) Kirklees Council: Kirklees Factsheets 2021
4) https://www.ons.gov.uk/census

Challenges: Environment



Kirklees Council declared a climate emergency in 2019 and our vision is for a Net Zero and Climate Ready Kirklees by 2038. Residents' surveys have shown high levels of concern about the impacts of climate change as well as support for improvements to public transport and active travel as a way of tacking local air quality issues. We can also reduce our greenhouse gas emissions by switching private vehicles to greener fuels such as electric vehicles and supporting the charging network. Our challenge is now to start to deliver on this support.

While we have reduced total emissions by 23% since 2013, there is a lot of work still be done. We need to continue working towards cleaner air, particularly in our ten air quality management areas, and reducing the impacts of pollution on our people's health and wellbeing. We also need to do more to encourage our residents to use our parks and greens-paces, and to extend green infrastructure and biodiversity networks into our streets, spaces and places.

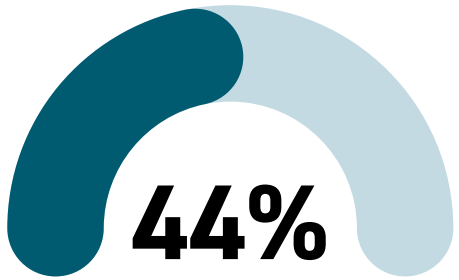
We want to deliver the Net Zero and Climate Ready Kirklees by 2038 target, as well as improve our air quality and increase our use of sustainable modes of transport.

Link to Council Plan Priority: Continue to deliver a greener, healthier Kirklees and address the challenges of climate change

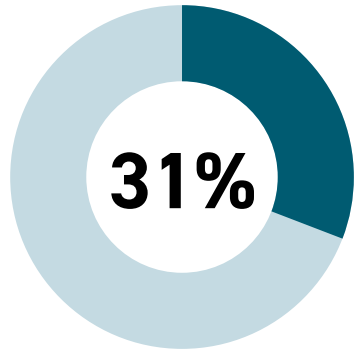
Concerned about climate change
86%

Support Kirklees' Net Zero target
80%

Climate change affecting Kirklees[1]
78%



local residents using local parks or green spaces at least once a week[2]



of our greenhouse gas emissions came from transport (2021)[3]

Data references:
1) https://www.kirklees.gov.uk/beta/climate-emergency/pdf/appendix-d-resident-survey-output.pdf
2) https://public.tableau.com/app/profile/kirklees.intelligence.service/viz/CLiKSurvey2021/Home
3) Department for Energy Security and Net Zero, UK local authority and regional greenhouse gas emissions national statistics: 2005-2021

Challenges: Communities



Parts of Kirklees represent some of the most deprived areas in England. The Indices of Multiple Deprivation is a combination of different factors, and our performance is worse in the quality of local environment, housing, air quality, road traffic collisions and crime.

People living in more deprived areas are more likely to experience poor levels of personal safety. Rates are also higher amongst women, residents aged 16-34 and disabled residents.

There are inequalities within Kirklees, with more low-income families (20% of our residents) at high risk of transport related social exclusion, limiting their quality of life and opportunities. Some parts of Kirklees are not currently accessible enough, nor provide a safe enough built environment, to encourage sustainable travel. Active travel routes between our communities don't always connect together seamlessly, forming a barrier to those who want to walk, wheel or cycle. These types of travel are low cost and can help reduce transport related social exclusion. We want to overcome transport as a barrier for accessing opportunities. No one should be limited by transport, nor should they have to own a car to be able to access work, education, local services, healthcare, leisure pursuits and social connections.

Our transport strategy sets out our commitment to help Kirklees to connect our communities, so that people who live in Kirklees have access to local services, social activities and experience spaces and places that improve wellbeing.



of Kirklees neighbourhoods have a high risk of Transport Related Social Exclusion[1]

Residents not feeling safe travelling[2]



Link to Council Plan Priority: Continue to invest and regenerate our towns and villages to support our diverse places and communities to flourish.

Data references:
1) https://transportforthenorth.com/wp-content/uploads/Transport-related-social-exclusion-in-the-North-of-England.pdf
2) https://public.tableau.com/app/profile/kirklees.intelligence.service/viz/CLiKSurvey2021/Home

Challenges: Health

Health

In Kirklees, our levels of physical activity are lower than the national average. If we can increase our levels of physical activity, there will be substantial health benefits to be gained. There are many ways we can increase our physical activity levels, and one is rethinking how we travel in our day-to-day lives. By travelling actively more we can lead healthier lives and prevent health issues arising.

The quality of public spaces and levels of vehicle traffic can have negative impacts on some of our settlements, with through traffic and major roads impacting mental health through noise and social issues and physical health through air quality or by making it harder to walk or cycle. Sustainable/active travel networks are not as widely available as they should be. The impacts of congestion and poor air quality are often felt in areas with the lowest car ownership, by communities that contribute least to the problem.

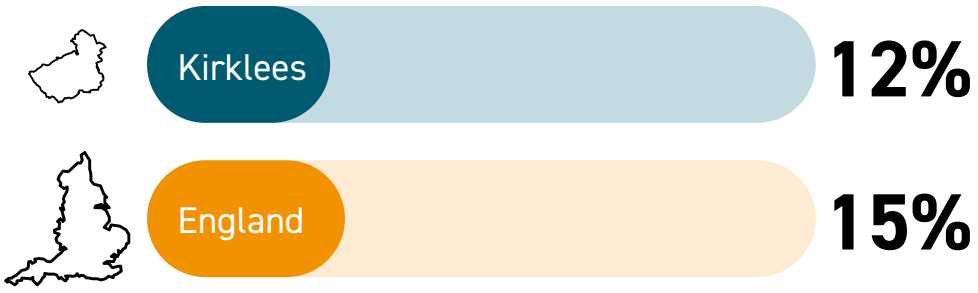
We want Kirklees to be more active, by helping everyone access and use our outdoor spaces more actively, by walking, cycling or wheeling. We want to make it easier to travel in ways which have positive benefits to our health and wellbeing.

Link to Council Plan Priority: Continue to deliver a greener, healthier Kirklees and address the challenges of climate change.

Physically active adults[1]



Adults who walk for travel at least once a week[1]



Sources:
1) Sport England. Percentage of physically active adults for Kirklees (2022/23). The indicator below is based on the number of respondents aged 19 and over, with valid responses to questions on physical activity, doing at least 150 moderate intensity equivalent (MIE) minutes physical activity per week in bouts of 10 minutes or more in the previous 28 days.

How is transport starting to change in Kirklees?

Sustainable Transport and Active Travel Schemes
Multi-million pound investment in major transport schemes that will deliver transformational walking, cycling and bus priority improvements to better connect towns and local centres including Dewsbury, Huddersfield, Batley, Holmfirth, Mirfield, Cleckheaton and Heckmondwike. Upgrades to canal towpaths for walking, wheeling and cycling, include planned improvement schemes in Mirfield and between Slaithwaite and Huddersfield. Many of these schemes are due to begin delivery in 2025 and 2026.

Rail Upgrades
Major upgrades to Huddersfield, Deighton, Ravensthorpe, Slaithwaite, Marsden and Mirfield stations
More frequent, faster and more comfortable journeys across the Trans Pennine Route between Liverpool, Manchester, Huddersfield, Dewsbury Leeds, York and the North East
Work is ongoing to improve reliability on the Penistone Line

Bus Franchising Programme
West Yorkshire Combined Authority recently committed to bus franchising from 2024. Kirklees will be one of the first districts which will see local control over routes, frequencies, fares and bus standards. This will improve service frequency and reliability, create a more integrated bus network, introduce higher vehicle and bus stop standards.

Bus Stations and Bus Priority
Other committed bus improvements using government funding include:

- Introducing bus priority and reliability on congested corridors in Kirklees to reduce bus journey times
- Introduction of a new bus hub in Heckmondwike. Revitalising Dewsbury and Huddersfield bus stations.

Town and Local Centre Visions
Our regeneration blueprints are about improving towns and villages across Kirklees - creating more vibrant a varied, safe and sustainable centres that bring communities together. We have published or are developing plans for Huddersfield, Dewsbury, Batley, Cleckheaton, Heckmondwike, Holmfirth and Marsden. Many of these projects are starting to enter a delivery phase.

Shared Transport Hubs
These aim to make journeys seamless – with improved facilities at key locations, including improved bus stops with real time information, better waiting environment, improved cycle parking, better drop off facilities, parking for electric vehicles, bike and car clubs.

Developing Mass Transit Proposals
WYCA has plans to deliver a Mass Transit system in West Yorkshire. A line between White Rose and Dewsbury remains an ambition for both Kirklees and WYCA. Mass transit will provide an attractive alternative to car travel by improving connectivity and integration across West Yorkshire.



Canal in Huddersfield

How we achieve our vision

How we achieve our vision

Having set our vision for travel in the district we need to define some clear objectives. These objectives set out what the Transport Policy seeks to achieve and will help steer future decision making.

These Objectives will be underpinned by and aligned with specific policies for the Council and our partners to work on in the future. Some of the policies might help contribute to one of the five Strategic Objectives, some might contribute to multiple, but overall, these policies are designed to meet these five objectives.

Policies have been developed with future council decision-making in mind. Policies are worded to be clear and direct, to help inform future decisions on development, investment, transport and regeneration.

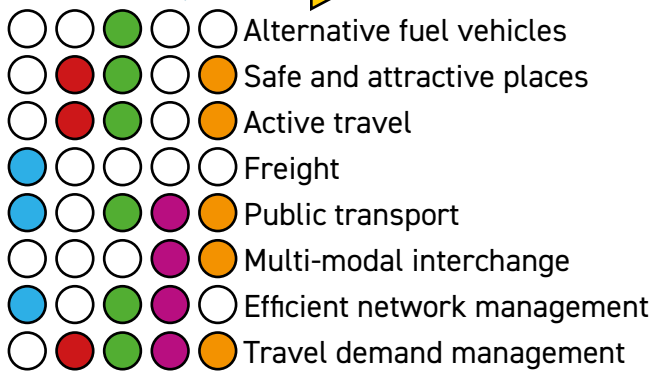
The **objectives** are what we need to deliver to make the vision a reality.

- Prioritising **economic growth** - attracting investment while increasing opportunities and life chances for all
- Improving **health and wellbeing**, supporting safe and active lives for our communities
- Protecting our **environment** with a transport network that is carbon net zero
- Transformed **public transport** that strengthens links within the district and beyond
- **Inclusive places** with better connections which are accessible and affordable for all

The **vision** is a big-picture aspiration for what travel and transport look like in the future.

Our vision is for travel in Kirklees to be sustainable, healthy and accessible to all, creating safe, thriving places and connected communities.

Policy areas set out the areas where we will take action. They will guide decision-making and ultimately realise the vision.



Objectives: Prioritising Economic Growth

Prioritising economic growth - attracting investment while increasing opportunities and life chances for all

- Freight
- Public transport
- Efficient network management
- Active travel

Transport allows us to travel to our jobs, to education, to healthcare, to leisure and retail opportunities and shouldn't be a barrier to opportunity. That's why making transport choices more affordable and available is key to our Transport Strategy. We know that increased access to opportunities is the best and most sustainable way for us to achieve strong regeneration and development, which can lead to a more prosperous Kirklees for all.

Across Kirklees there are significant levels of disparity in connectivity and travel times depending on the mode available where you live. Some parts of Kirklees have many transport options, with others being relatively more disconnected. This means that people in some areas, especially those who don't have access to a car have more limited options for work, training, education or leisure. This can be compounded when people have additional barriers to travel, such as accessibility issues. Access to employment opportunities in Kirklees should be improved to support employment and better prospects for our residents by attracting businesses and providing affordable connections to jobs and training.

Linked strategies:
Kirklees Inclusive Economic Strategy 2024

By improving the options people can chose from to travel around Kirklees our residents will be better connected to a wider range of employment opportunities and education facilities, with transport no longer being a barrier to students developing the skills they need to succeed in life.

Integral to the regeneration of our towns and centres will be easy access by active travel and better bus, coach and rail services. Delivering improved connectivity will make Kirklees more attractive for businesses and visitors, as well as driving higher pedestrian footfall in our urban centres and on high streets. This will help to prioritise sustainable economic growth across our district.

Investment in all types of transport infrastructure will be vital, including improving highway networks, particularly where this facilitates easier movement of goods and freight across and through Kirklees. We will work with partners to develop more facilities for safe and efficient transport of road freight, particularly on our strategic road network. Increased capacity on the rail network will lead to opportunities for our partners to pursue the increased uptake of rail freight through the district.

Council Shared Outcomes	
✓	Shaped by people
✓	Best start
	Well
✓	Independent
✓	Aspire and achieve
✓	Sustainable economy
✓	Safe and cohesive
	Clean and green

Objectives: Improving Health and Wellbeing

Improving health and wellbeing, supporting safe and active lives for our communities

- Safe and attractive places
- Active travel
- Travel demand management

Being active and more connected to the places around us is good for our health. People who are more physically active are typically healthier and suffer fewer of the chronic diseases that are becoming increasingly prevalent across the UK[1]. We want to create vibrant places and streets where people feel safe to be active, socialise and connect with their communities, opportunities and nature.

Our spaces should connect and cater for all age groups and levels of mobility. They should have cleaner air, be safe (and feel safe) for young people, encouraging active lives, providing attractive routes to school and places to play as well as enabling older people to be independent for longer. They should be inclusive and accessible to all, particularly for groups most likely to suffer exclusion such as women and girls, people with visible and non-visible disabilities. We will work to improve these networks and maintain and improve their condition.

Our aim for safer streets, called 'VISION ZERO' is to eliminate all traffic fatalities and severe injuries[2]. We will work to provide safer space for active travel on our existing streets and seek this in new developments.

Travel independence and affordability will be increased as people have more opportunities to make more trips by public transport and active travel. Social exclusion and isolation can be reduced as more people feel able to access their local communities and employment opportunities. Given that walking, cycling and wheeling are low cost, improvements to these networks can both alleviate transport cost pressures and bring more people into the local economy.

Encouraging active lives through improved and accessible walking, cycling or wheeling journeys, should be a core aim of our networks. In residential and neighbourhood areas streets should prioritise people over vehicles. Creating more active places can benefit other areas too; by being more environmentally friendly, lowering carbon emissions, improving air quality, promoting socially inclusion and are more economically productive[1].

Council Shared Outcomes	
✓	Shaped by people
✓	Best start
✓	Well
✓	Independent
	Aspire and achieve
	Sustainable economy
✓	Safe and cohesive
✓	Clean and green

Linked strategies:
Kirklees Health and Wellbeing Strategy
Local Cycling and Walking Infrastructure Plan

1) Active Design (sportengland-production-files.s3.eu-west-2.amazonaws.com)
2) What is Vision Zero? | Vision Zero Network https://visionzeronetwork.org/about/what-is-vision-zero/

Objectives: Protecting our Environment

Protecting our **environment** with a transport network that is carbon net zero

- Alternative fuel vehicles
- Safe and attractive places
- Active travel
- Public transport
- Efficient network management
- Travel demand management

Transport is one of the biggest contributors to our district's total carbon emissions. To reach Net Zero by 2038 we need to travel more by active and sustainable modes and less by petrol and diesel fuelled private vehicles. We will be unable to meet our net zero commitment without big changes to the way we travel.

Council Shared Outcomes	
✓	Shaped by people
	Best start
✓	Well
	Independent
	Aspire and achieve
	Sustainable economy
✓	Safe and cohesive
✓	Clean and green

Linked strategies:
Kirklees Climate Change Action Plan (2022)
and the forthcoming Environmental Sustainability Strategy

The biggest changes can be achieved by...

...**reducing** the need to drive as often or as far by improving access to day-to-day local services, improving digital connectivity and improving sustainable travel networks, we can support people making support people making fewer trips by private car.

....**shifting** some trips to more sustainable modes by switching away from the private car to alternatives. The more people we can encourage to walk, cycle, wheel, or use public transport, the cleaner our air will be. This will contribute to healthier lives in Kirklees. This will also reduce congestion for those trips where driving remains the best option.

...**supporting** the ownership of electric and low emission vehicles through the development of affordable charging networks. This will include working with partners to decarbonise our public transport network and freight transport.

...**mitigating** climate change impacts by ensuring new transport infrastructure and public realm improves biodiversity and ensuring our networks are resilient to climate impacts such as extreme heat and flooding.

Objectives: Transformed Public Transport

Transformed **public transport** that strengthens links within the district and beyond

- Public transport
- Multi-modal interchange
- Efficient network management
- Travel demand management

Kirklees is well-located as a district, sitting between the centres of Leeds, Manchester and Sheffield, with a range of mixed rail and bus connections. However, access to these connections is not equal for everyone in Kirklees, and it can be difficult to make local journeys across the district.

Many people in Kirklees do not have access to a car and rely on alternative methods of travel to get around, and many drivers would also like to use their car less and public transport more. Where areas lack good public transport access, people can miss out on employment or training opportunities.

Council Shared Outcomes
✓ Shaped by people
✓ Best start
✓ Well
✓ Independent
✓ Aspire and achieve
✓ Sustainable economy
✓ Safe and cohesive
✓ Clean and green

Linked strategies:
West Yorkshire Bus Service Improvement Plan (2022)

Our consultation with the public on the Kirklees Transport Strategy demonstrated that public transport is the biggest area of dissatisfaction with the current transport offer in Kirklees. It is one of the biggest barriers to travelling more sustainably and one of the areas the public most wanted to see improvement in. The current public transport offer makes many people feel that the private car is the only viable option. We want people to feel they have access to a wide range of transport options, whatever their journey.

More reliable bus and rail services, with improved coverage and affordability will encourage more people to use sustainable modes such as bus and rail for medium and longer distance trips. For rail we will work hard to maximise the benefits of schemes such as the Transpennine Route Upgrade so that our residents and businesses beyond the transport corridors themselves. We will also be working closely with the West Yorkshire Combined Authority on plans for local rail (including the Penistone Line) bus and mass transit.

We will seek to improve coordination and interchange between bus and train services and improve the environment around stations and stops, to make it easier for all to travel. We will seek improvements to personal safety around stations and stops, especially during off-peak times. Developing integrated ticketing across modes will complement shared transport hubs with a range of options for accessibility needs, to make it easier to travel to stations, switch between modes and feel safer while doing so. We seek more and improved walking, wheeling and cycling routes to stations and stops, providing joined-up trips using bus and rail for part of the journey.

Objectives: Inclusive Places with Better Connections

Inclusive places with better connections which are accessible and affordable for all

- Safe and attractive places
- Active travel
- Public transport
- Multi-modal interchange
- Travel demand management

Security, connection and belonging can help foster a sense of pride in the places we work, study, shop and call home. An inclusive community can reduce loneliness and isolation, improving health and wellbeing for our residents. We want children to feel safe walking, cycling or scooting to school and have safe streets to play in. The quality of our streets can also help develop a sense of connection and belonging between people and places, building on the quality and heritage of our built environment.

Transport's role in the development of inclusive communities is to provide the connectivity that all people need to go about their daily lives. No one should be excluded from travel because they don't have access to a car, a safe active travel route, access to public transport, or due to mobility or affordability. A network of shared transport hubs (sometimes referred to as mobility hubs), and better integration between public transport and active travel networks will help minimise these barriers to getting around.

Linked strategies:
Kirklees Inclusive Communities Framework

Taxis and private hire vehicles fill a gap between private and public transport modes. We will work with partners to ensure well-designed pick-up and drop-off facilities are integrated at our main transport hubs and other key locations. We will work with partners to develop availability of accessible taxis and accessible shared transport.

Places should be physically inclusive too. We will make our streets safer (and feel safer), reducing road traffic collisions, improving air quality and considering how lighting can improve safety. We will tackle the severance impacts of major roads and ring roads around our urban centres, physically cutting off communities from key destinations. We will work with partners to remove barriers to transport such as increasing the availability of accessible buses, trains, stations and stops.

We will provide behaviour change initiatives with our partners to support and encourage sustainable ways to travel. This might be through providing information, skills, or advice to help people use buses, trains or cycle routes more confidently and safely.

Council Shared Outcomes	
✓	Shaped by people
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✓	Well
✓	Independent
✓	Aspire and achieve
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✓	Safe and cohesive
	Clean and green

Consultation

1. Engagement with Councillors, technical teams within Council and external stakeholders
2. Public consultation
3. Redraft of Strategy document following an analysis of consultation responses
4. Engagement with Councillors, technical teams and stakeholders
5. Necessary political approvals
6. Delivery of final Strategy document followed by adoption of strategy



The Public Consultation

Consultation ran from **March to April**

16 in-person events

Social media campaign

2112 responses

Over 7000 leaflets and posters distributed across Kirklees

Multiple ads including bus backs, bus interiors, petrol pumps, radio and digital

We received **over 1500 comments** from people who live and work in Kirklees on our draft strategy document.

We heard residents' wishes to have their unique feedback understood and we have undertaken detailed analysis on this feedback.

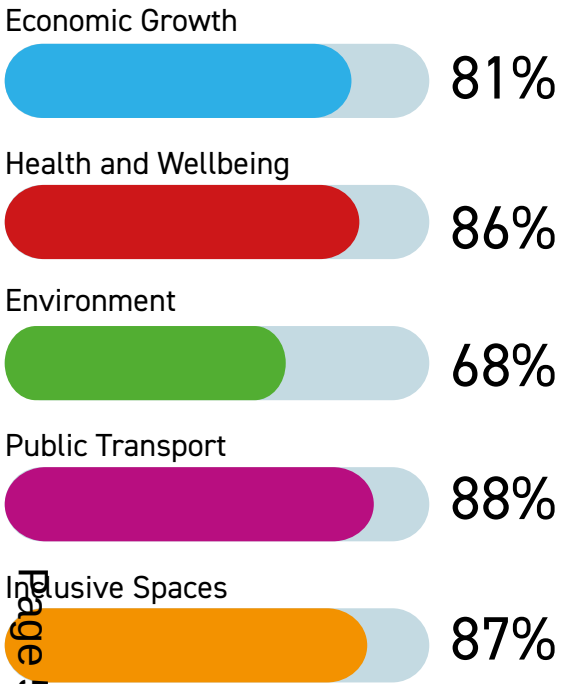
This analysis has been used to strengthen the areas where people who live and work in Kirklees want to see change the most.

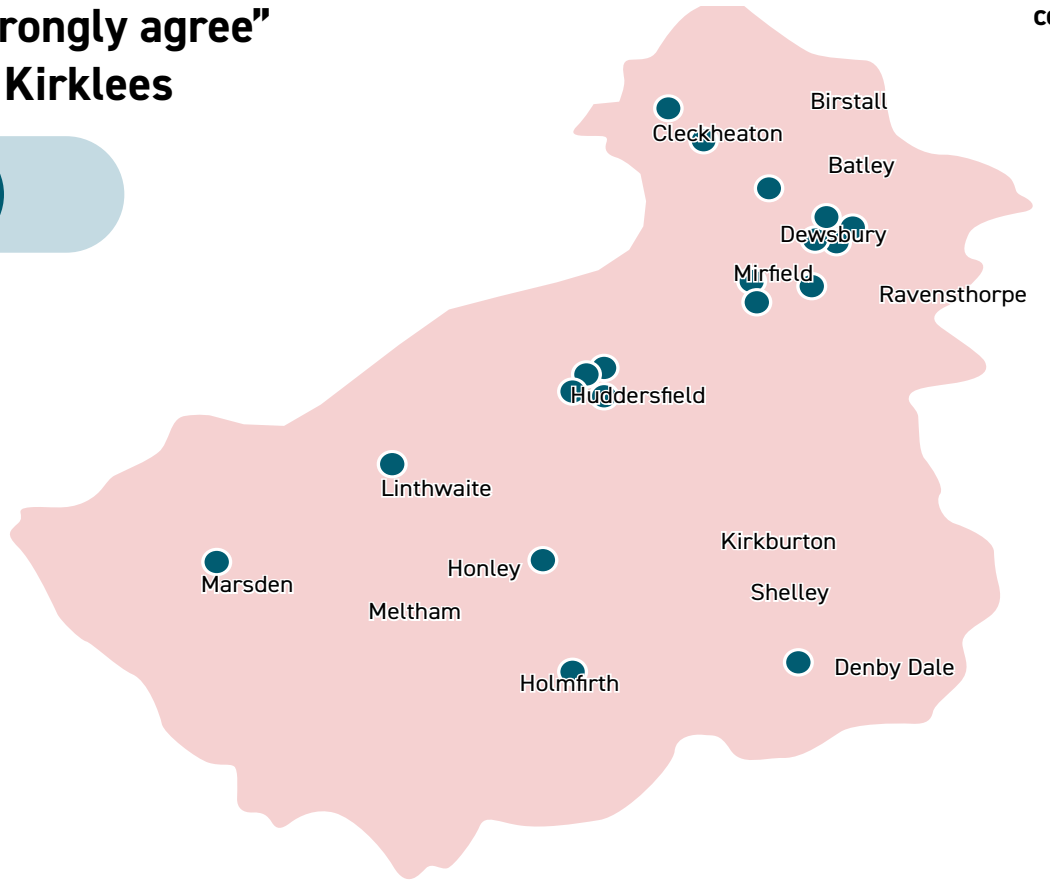
Consultation findings

77% of respondents "agree" or "strongly agree" with the Transport Vision for Kirklees



To what extent to you agree with the 5 objectives? (strongly agree and agree)





Locations where in-person consultation events were held

- Dewsbury Rail Station
- Denby Dale Rail Station
- Huddersfield Rail Station
- Mirfield Rail Station
- Slaithwaite Rail Station
- Marsden Rail Station
- Dewsbury Market
- Huddersfield Market
- Dewsbury Bus Station
- Huddersfield Bus Station
- Cleckheaton Bus Station
- Greenwood Centre, Ravensthorpe
- Mirfield Library
- Cleckheaton Library
- Honley Library
- Holmfirth Library
- Heckmondwike Library
- Dewsbury Library
- Huddersfield Library

"I would like it to be safer to walk my children up to school"

"Better public transport would encourage me to leave the car at home"

"I'd like quieter and safer streets where I live"

"I want to cycle and walk more but need safer routes"



The policies

Dewsbury

Policy Summary

Having set our vision and objectives for transport in Kirklees, we need to think about what this means for different modes of transport and how we manage our networks. The following pages consider our eight key policy areas and set out specific policies.

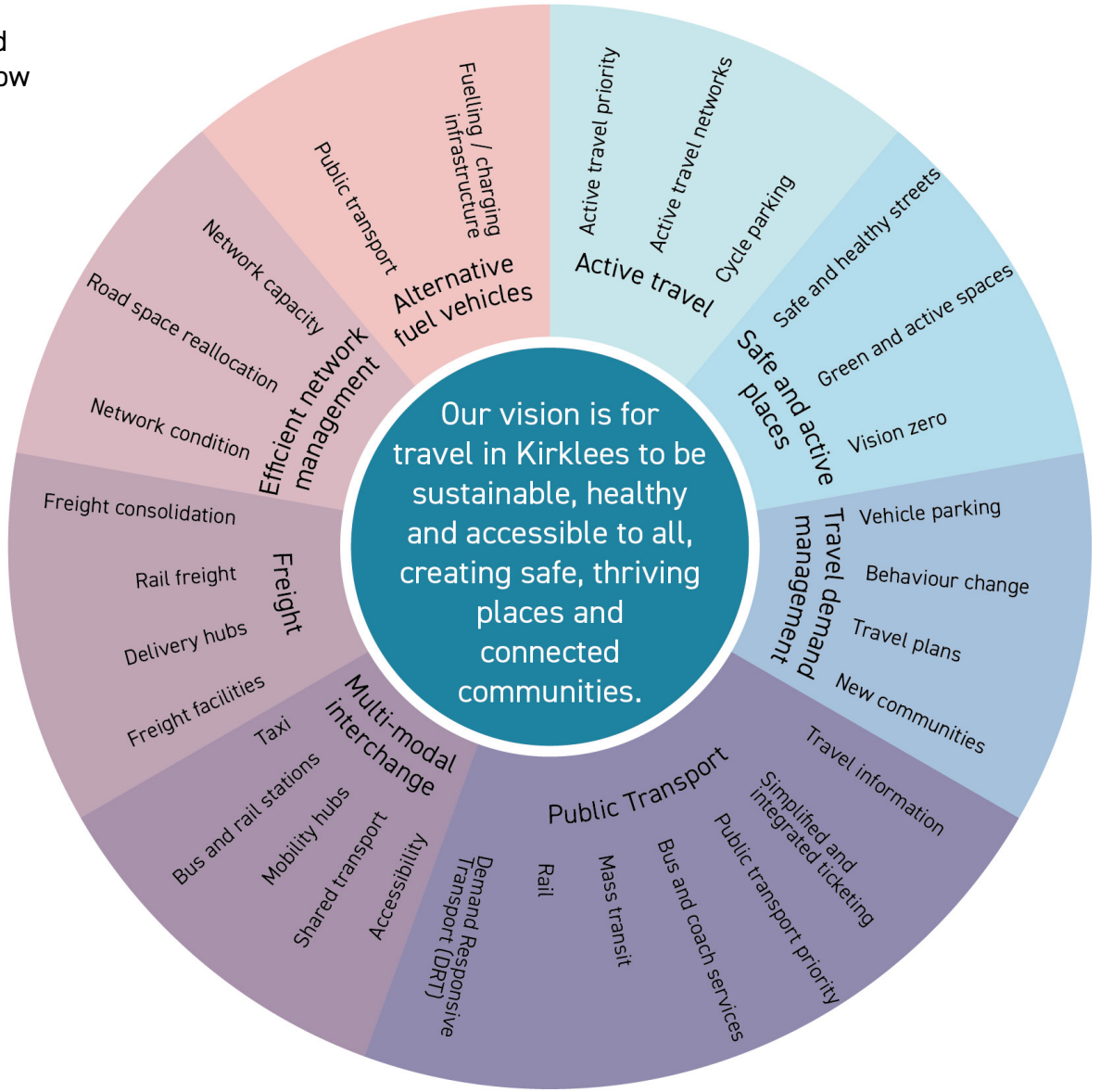
Each individual policy will address the strategy's objectives as shown below.

	Prioritising **economic growth** - attracting investment while increasing opportunities and life chances for all
	Improving **health and wellbeing**, supporting safe and active lives for our communities
	Protecting our **environment** with a transport network that is carbon net zero
	Transformed **public transport** that strengthens links within the district and beyond
	Inclusive places with better connections which are accessible and affordable for all

Each Objective is colour coded. Policies which aim to support these objectives are shown with each objective's colour beside them.

Example Policy

Integrate transport improvements with attractive green spaces to provide safe and enjoyable places for all people to be active. Explore opportunities to improve biodiversity through additional green infrastructure.



WHY ACTIVE TRAVEL?

Active travel (such as walking, cycling and wheeling) is the most healthy, affordable and environmentally sustainable way to travel. We want to provide safe walking, cycling and wheeling routes throughout Kirklees.

Many of our local trips are short-distance, meaning there's potential for more of these types of journeys to be made by active modes. Safe, integrated active travel networks make people feel secure and comfortable travelling in this way. This helps to encourage more local trips by foot and bike, such as popping to the shops or doing the school run.

Active Travel infrastructure such as safer crossings or safe routes to school can provide a real choice for how people get around. Improvements in streetscapes and public space design can lead to more vibrant and attractive places - ones which feel safe to walk, wheel and cycle in.

Of the residents surveyed, 48% said that a lack of infrastructure to assist accessibility needs stopped them using sustainable transport, a further 33% had concerns over road safety[1]. We aim to provide more high-quality cycling routes and address barriers and gaps in our urban and rural networks for walking, wheeling and cycling. Transport projects should consider how people with mobility aids, pushchairs, wheelchairs and other accessibility needs access and use streets and spaces.

KEY

- Economic growth
- Health and wellbeing
- Environment
- Public transport
- Inclusive places

Policy AT-1

Improve walking, wheeling and cycling connections to and from our towns and local centres where there is currently severance across junctions, ring roads and major roads to allow people safe and direct active journeys.

Policy AT-2

Improve accessibility including the review and removal where possible of physical access barriers that prevent legitimate users such as pushchairs, wheelchairs, and mobility scooters.

Policy AT-3

Develop a strategic cycling and walking network plan (Local Cycling and Walking Infrastructure Plan) that sets out a prioritised future network for Kirklees.

Policy AT-4

Create and maintain safe, high quality and integrated active travel networks including traffic-free greenways and protected on-road routes. Our communities, including those with additional accessibility needs, will be able to walk, wheel and cycle for local and longer journeys.

1) https://www.kirklees.gov.uk/beta/climate-emergency/pdf/appendix-d-resident-survey-output.pdf

Active travel is often part of a longer journey, linking with public transport. We will therefore make improvements to walking and cycling routes to transport hubs like rail stations, and aim to make changing between modes easier (see interchange policies)

Secure bicycle parking at key destinations such as shops, schools, leisure facilities and healthcare play an important role in encouraging cycle use. These cater for more types of cycles, including children's bikes, trailers, cargo bikes and adapted bikes. Opportunities for charging of e-bikes should also be considered.

Parking areas should have adequate security measures such as adequate lighting and good visibility, so that people feel comfortable using them, especially after dark.

HOW WILL IT BE DELIVERED?

We will develop a Kirklees-wide walking and cycling network plan, which with include the Local Cycling and Walking Infrastructure Plan (LCWIP) at its core. This will help us to secure funding and target investment in the right places.

This will build on the substantial programme of major transport schemes (funded by the Transforming Cities Fund (TCF), City Region Sustainable Transport Settlement (CRSTS), West Yorkshire plus Transport Fund, Levelling-up Fund (LUF) and Active Travel Fund (ATF)) that are already in development and delivery across Kirklees.

We will strive to implement best practice design, considering protecting cyclists from general traffic, pedestrian safety, accessibility, lighting, wayfinding and secure cycle parking as priorities.

We will develop a joined-up approach with our Environment Strategy and our town and local centres regeneration blueprints, to maximise the benefits and target funding appropriately. We will work with local organisations and bodies such as Active Travel England to support us, and will consult with communities on new schemes.

Policy AT-5

Prioritise active travel through the design of new developments, regeneration masterplans and blueprints to create attractive, healthy and active places.

Policy AT-6

Provide more short and long stay cycle parking for all cycle types, mobility aids, mobility scooters and powered wheelchairs.



Dewsbury

WHY SAFE AND ACTIVE PLACES?

We can increase the success and vibrancy of our town and local centres by making them more attractive places to visit and spend time, by making them less dominated by moving traffic and parked cars, leaving narrow pavements and poor air quality.

Like many places, over the last few decades parts of our streetscapes, particularly pavements and verges, have become increasingly dedicated to parked vehicles and traffic. This impacts how pleasant and inclusive our neighbourhoods are – for meeting neighbours, children playing in the street, and for feeling safe.

By re-prioritising how our streets are used we can create safer and more pleasant residential streets, allowing our children to travel to school or the park safely and confidently by walking, cycling or scooting. Evidence from across the UK suggests that investing in public realm improvements so that more people walk, cycle and use public transport results in higher levels of footfall, reduced retail vacancy rates and improved road safety[1]. There is also evidence which suggests that those who travel to a local centre sustainably make more trips and spend more than those who travel by car[2].

Making shifts in how we plan, design and use spaces can improve our air quality and links with the targets in our Air Quality Action Plan. We can also better integrate our green spaces with our safe and active travel network. This will also help deliver aims of the council's Greenspace Strategy.

Policy S-1

Identify and deliver school road safety and air quality improvements such as School Streets to support safe, accessible and healthy routes to school.

Policy S-2

Implement Vision Zero which seeks to eliminate all traffic fatalities and severe injuries.

Policy S-3

Integrate transport improvements with attractive green spaces to provide safe and enjoyable places for all people to be active. Explore opportunities to improve biodiversity through additional green infrastructure.

1 Active Design (sportengland-production-files.s3.eu-west-2.amazonaws.com)
2 Walking and cycling: the economic benefits (tfl.gov.uk), pedestrian-pound-2018.pdf (livingstreets.org.uk)

Safe and active places

Making our streets healthy isn't just about how we travel through them, it's also about how we spend time on them. Considering how we utilise streets can also play a part in how we design and maintain our streets and adapt to climate change.

HOW WILL IT BE DELIVERED?

We will work towards the West Yorkshire Vision Zero Strategy including creating safer roads, particularly near schools, aiming to eliminate all traffic deaths and serious injuries, while increasing safe, healthy, equitable mobility.

By integrating active and sustainable travel into our exciting town and local centre regeneration schemes, including Dewsbury, Huddersfield, Batley, Holmfirth, Cleckheaton, Heckmondwike and Marsden, we will connect our places better with the communities that want to visit them.

We will ensure enjoyable, safe environments for all that encourage walking, cycling, and public transport by taking a Healthy Streets approach[1].



Dewsbury

Policy S-4

Integrate and deliver accessible walking, wheeling and cycling provision as part of high quality placemaking and public realm. Active travel users will be treated as a priority consideration in Highway Network Management and maintenance.

Policy S-5

Work with partners to expand and improve the quality, safety, accessibility and routes to, from and along our traffic-free greenways.

Policy S-6

Create safer, active and healthier neighbourhoods, town centres, and local centres featuring reduced speed limits and lower traffic volumes to prioritise people over vehicles. Priorities will be identified by working with local communities and stakeholders and be aligned with our regeneration ambitions.

1) https://www.healthystreets.com/

WHY TRAVEL DEMAND MANAGEMENT?

"*Travel Demand Management 'TDM' is an umbrella term for the application of strategies and policies to reduce travel demand, or to redistribute this demand in space, mode or in time*"[1]

By providing high-quality active travel and public transport options, as well as thoughtful management of vehicle access and parking controls we can widen travel choices, which can help alleviate traffic congestion and improve local air quality. Locating new communities developments and jobs in well-connected areas can help support and improve existing transport options, providing benefits to existing residents as well as new ones.

This approach to travel demand management will create safer, pedestrian-friendly streets, supporting sustainable economic growth and mitigating climate change impacts. Through this, Kirklees can help all communities integrate into a robust and resilient network that benefits both people and the environment.

By locating appropriate levels of parking at key transport hubs, such as railway stations, we can make car travel part of a longer journey rather than the whole journey, and alleviate traffic congestion in urban and rural centres by encouraging people to travel by public transport.

Policy TD-1

Provide parking management measures across Kirklees that help promote more sustainable travel options than private cars, as well as Car Club locations, Electric Vehicle charging points and cycle parking.

Policy TD-2

Support vehicle parking controls with suitable enforcement measures to make our pavements and streets safer for everyone. Review the potential for Controlled Parking Zones and pricing strategies to balance supply and demand, particularly in areas highly connected by sustainable modes.



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1 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/972414/DfT-Travel-Demand-Management-Toolkit-March-2021-accessible.pdf

HOW WILL IT BE DELIVERED?

We will aim to provide parking that meets people's travel needs equitably. Sustainable modes should be encouraged while being conscious of accessibility for people with limited mobility. Parking controls can also supporting charging of electric vehicles, protecting disabled parking spaces, cycle parking and integrating our car club provision.

To maximise the benefit of delivering infrastructure and services our communities need to be supported to use them. Programmes which enable and empower local residents, visitors and employees will allow people to choose to travel actively or by bus or rail more confidently and successfully.

This includes expanding cycle training, journey planning, walking groups, bike maintenance, route advice, and try an e-bike offers, already being delivered by our valuable local providers.

On a wider scale, we can ensure that new development in Kirklees is located, designed and built so that sustainable travel is the natural choice of travel for new residents. We will use the local plan making process to embed our vision early in the planning of new development and support it with targeting developer contributions towards sustainable transport measures.

We will work in alignment with our green and active places, securing contributions which also allow for opportunities for Biodiversity Net Gain.

Policy TD-3

Continue to work with the Travel Plan Network, working with businesses, residents and organisations to develop effective travel plans and help people travel more sustainably.

Policy TD-4

Continue to work with partners to deliver behaviour change initiatives that encourage and enable people to walk, wheel, cycle and use public transport safely and confidently.

Policy TD-5

Use developer contributions to better support active travel networks and public transport.

Policy TD-6

Develop a Local Plan that prioritises sustainable journeys to new developments. Promote development in areas which are better connected by active travel and public transport links.

Public transport

WHY PUBLIC TRANSPORT?

Reliable, high-quality, accessible and well-connected bus, coach and rail services are crucial in enabling all residents the opportunity to access education, employment and services. There are disparities in the level of public transport provision across Kirklees, which means some people are unable to rely on public transport.

The provision of appealing and reliable bus, coach and rail services in Kirklees is key to increasing public transport patronage. This will help to make services more financially sustainable, improve air quality and reduce congestion in our urban areas and ensure Kirklees reaches our Net Zero target.

The franchising of bus services across Kirklees and major rail upgrades, such as the multi-billion pound Transpennine Route Upgrade (TRU) and much needed improvements to the Penistone line, will help to make transformational change to our public transport coverage.

Developing better connections within and beyond Kirklees are crucial to ensure we capitalise on investment and improve regeneration opportunities for our area. We will work to support the development of these proposals and ensure benefits can be realised for people across Kirklees.

HOW WILL IT BE DELIVERED?

Improvements to Kirklees' public transport services will be delivered by working with key partners, including West Yorkshire Combined Authority, bus and rail operators, and neighbouring authorities. We will support the refurbishment of our bus and rail stations, recruitment of staff to improve service reliability, and improvements to public transport safety. We will work with partners to see the delivery of a minimum half-hourly service on all routes. In March 2024, the decision to franchise the bus network in West Yorkshire was announced, with Kirklees set to receive the first franchised services. This presents an opportunity for Kirklees to shape what the future of bus services will look like in our district.

We will work to provide a public transport network that connects more people, is more affordable and provides a safe, convenient and reliable service. We want an inclusive public transport network that extends better to our more rural areas and expands access to work and training opportunities.

Policy P-1

Continue to work with WYCA and operators to implement the planned franchised bus service and deliver a more inclusive network, with better coverage, reliability, operating hours and frequency.

Policy P-2

Support delivery of West Yorkshire Mass Transit within Kirklees.

Policy P-3

Continue to work closely with industry partners and rail operators to support rail connectivity, capacity / rolling stock enhancements and frequency, such as on the Penistone Line and Transpennine Route Upgrade (TRU).

Public transport

Where there are delays to bus services, we will encourage road network improvements which support better journey times and reliability through the implementation of bus priority.

To improve the public transport offer across Kirklees we will seek opportunities to utilise technology to deliver viable and sustainable services, particularly to our rural communities, or areas where topography creates a barrier for some. Flexible demand responsive services can provide rides where fixed service struggle to maintain a consistent service.

Making public transport journeys, stations and stops more attractive will encourage people to use the train and bus more often.

Having clear and up to date information on your travel gives you confidence and clarity for your journey.

We will work closely with public transport partners to deliver simpler and affordable public transport, including journeys which cross boundaries outside of West Yorkshire.

Simpler ticketing which is easy to understand is crucial for public transport passengers. Integrated tickets enable the use of different modes or operators and make your whole journey easier.

Policy P-4

Prioritise local bus services over general traffic making journeys quicker, more reliable and punctual.

Policy P-5

Work with partners to examine the feasibility and deliver Demand Responsive Transport services to enhance the public transport offer where conventional services are not feasible commercially or economically.

Policy P-6

Work with partners to ensure that public transport vehicles support the travel of those with additional accessibility needs, such as increasing the number of available disabled spaces on-board and ensuring passenger information is inclusive.

Policy P-7

Enhance passenger information with integrated 'real time' journey planning and live information at key locations and interchanges to offer a better user experience.

Policy P-8

Work with the industry to support clear and simple ticketing that is fairly priced, with better integration across modes, operators and across boundaries, to promote a competitive public transport offer.

Multi-modal Interchange

WHY MULTI-MODAL INTERCHANGE?

Connections from our communities to interchange with bus and rail stations will be an important part of people's perceptions around public transport accessibility. At stations, transfer between different services will also be a key consideration. Making changes between modes smoother and more efficient will make our public transport system more attractive to use and reduce the need to for car travel in Kirklees.

We will work to improve the overall passenger experience, including comfort and accessibility of our stations and transport hubs for everyone. We want to improve accessibility at stations so people with limited mobility, as well as those with luggage, pushchairs and bikes can better access our public transport. We also want to expand the local services available at stations, to include facilities such as bike hire and secure parcel collection and drop off points.

Taxis and private hire vehicles (PHVs) play a valuable role in our transport system. They are particularly important for enabling travel for those with limited mobility, those with no access to a car and linking to our transport hubs. They can provide safe transport options at all times of the day, supporting shift workers and the night-time economy when public transport options are more limited.

We want to better integrate these services, providing drop-off / pick-up locations at key locations and will integrate into our town and local centres regeneration plans such as in Huddersfield Town Centre.

Policy I-1

Enhance multi-modal interchange at key public transport hubs to make connections more user friendly, safer and highly integrated to other modes and the areas around them.

Policy I-2

Deliver and maintain high quality and accessible stations and interchanges to ensure that all stations across the district meet accessibility standards by 2030.

Policy I-3

Review and remove where possible physical barriers that prevent access to users such as pushchairs, wheelchairs, and mobility scooters.

Policy I-4

Deliver safe and accessible pick-up/drop-off and parking areas for vehicles, cycles and taxis at key public transport hubs to enhance access options for public transport.

Policy I-5

Work with taxi operators, local communities and special interest groups to ensure that taxis are affordable, accessible and well-located for a range of user groups, including vulnerable, disabled or isolated users.

Multi-modal Interchange

We want to support a range of travel options to and from our transport hubs, including prioritising first and last mile walking, wheeling and cycling trips to rail and bus stations. We will strive to implement best practice guidance from those such as the DfT for taxi and PHVs, and CoMoUK for shared transport.

Including shared transport options at these transport hubs broadens the availability and range of travel options.

HOW WILL IT BE DELIVERED?

We will improve key transport interchanges like rail stations to ensure easy onward travel by foot, with safe routes and clear wayfinding. Existing and new Shared Transport Hubs will be introduced combining public transport with shared transport options such as car clubs, cycle hire, and taxi services, safe pick-up/drop-off areas, along with facilities like toilet facilities, cafés, cycle repair locations and EV charging points where appropriate.

We will explore and embrace new emerging technologies and develop our transport network with flexibility to accommodate new trends in the future.

Policy I-6

Deliver quality mobility hubs alongside improved active travel links and community facilities at key locations to enable seamless transition between transport modes.

Policy I-7

Explore the feasibility of a shared micro-mobility offer with bikes and e-bikes at key locations to make 'first and last mile' travel easier and increase the attractiveness of sustainable travel options.

Policy I-8

Support expansion of car club schemes that reduce the need to own a car.



Dewsbury Railway Station

WHY FREIGHT?

Kirklees is close to several strategically important roads, including the M1 and M62 motorways, making us a hub for freight businesses. The rise in light vans and delivery vehicles during peak hours reflects evolving retail habits and technological advancements. There is a need for innovative solutions to manage commercial vehicle numbers with fewer, yet more efficient vehicles, while continuing to meet business and consumer needs.

By working with businesses, organisations and regional partners to consolidate freight and delivery operations we can adopt a bottom-up approach to reduce the number of vehicles on our roads.

Currently, the rail network is poorly utilised for freight due to network capacity constraints and operational challenges such as bridge height restrictions. We need to further explore the opportunities to shift freight from road to rail, thereby reducing emissions, improving air quality and easing traffic congestion.

We will work with local organisations and regional partners to consider opportunities for increase rail freight in line with the West Yorkshire based Rail Freight Strategy.

Policy F-1



Support opportunities for e-cargo bikes to deliver last mile goods, particularly in urban areas to reduce congestion and emissions in these areas.

Policy F-2



Explore options for freight facilities around strategic road networks, including secure lorry parking and rest facilities.

Policy F-3



Explore options for supporting delivery hubs, particularly in congested centres with poor air quality to minimise and combine the number of trips - reducing impacts of more vehicles on the road network.

Policy F-4



Work with businesses, organisations and regional partners to consolidate freight and delivery operations, particularly in poor air quality and congested areas.

HOW WILL IT BE DELIVERED?

Maximising load capacity for both outbound and return journeys, shifting deliveries away from peak hours, consolidating freight, uptake of sustainable technologies such as e-bikes for last-mile deliveries, and exploring options for rail freight and delivery hubs in congested areas can further reduce the environmental impact of freight.

Enhancing freight facilities with secure lorry parking and rest areas around the Strategic Road Networks is also key to improving freight conditions in Kirklees.



Dewsbury

Policy F-5

Maintain the Key Route Network to allow for the movement of goods via road.

Policy F-6

Work with WYCA and other regional partners to identify opportunities for rail freight, including the use of existing passenger services to carry good and parcels.

Policy F-7

Incorporate loading and delivery spaces into the design of new streetscapes and developments to support freight loading and traffic movement.

Efficient network management

WHY EFFICIENT NETWORK MANAGEMENT?

Making sure our network operates as efficiently as possible means our residents and businesses get the maximum possible from our highways assets. Traditionally this meant a focus on highway capacity, however, to achieve the aspirations of the Council and Partners we will need to manage our network in a way that supports a range of transport modes. Schemes which relieve traffic issues in one area can bring more traffic to another route, leading to negative 'knock on' impacts in other areas.

Within urban areas that experience congestion, space will be used efficiently, to promote sustainable modes of travel. This means that for those who need to drive, such as those with accessibility needs or journeys to areas not served by public transport, journeys are made more resilient. Reduced congestion on our network will lead to better local air quality across our district, improving health and wellbeing.

We will work to maintain our networks and assets effectively. We will look at the available space within our roads and streets, seeking to integrate bus priority, active travel and accessibility enhancements as we roll-out maintenance programmes. By improving the network condition, we can improve its lifespan and minimise costly renewal interventions which have implications for the environment and cause disruption from roadworks. This includes roads, cycling infrastructure and pavements as well as areas of public realm.

We will also seek to design and maintain our streets to improve their resilience. This includes improving resilience to climate change and extreme weather events such as integrating more sustainable urban drainage systems to cope better with heavy volumes of rail fall. This relates to our Kirklees Climate Change Action Plan (2022) which set out the aims to develop all existing and future transport infrastructure and assets so that they are 'climate ready'.

Policy N-1

Target capacity constraints and deliver high quality infrastructure to provide safer, quicker and more reliable journeys which integrates active travel and bus priority and improves air quality.

Policy N-2

Work with partners to target road improvements that help deliver the wider policies in this strategy, such as interventions that tackle speeding, rat-running and illegal vehicle manoeuvres, as well as providing infrastructure, road layouts, enforcement and technologies that prioritise the movement of people over vehicles.

Efficient network management


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HOW WILL IT BE DELIVERED?

We will work with public sector partners, businesses and organisations to identify key locations of opportunity to improve our road network that align with the objectives of this Strategy. We will continue to work with partners to deliver a programme of rail network improvements.

Policy N-3

Ensure network resilience to climate impacts to mitigate higher maintenance / renewal costs in the longer term.

Policy N-4

Maintain and improve our roads, cycle routes, pavements, public rights of way and traffic-free routes, including lobbying for more funding for them.

Policy N-5

Rebalance road space to prioritise active travel and public transport, by improving junctions, key corridors and local roads with appropriate infrastructure or traffic filtering in select locations.

Alternative fuel vehicles

WHY ALTERNATIVE FUELS?

While we want to make active travel modes and public transport easier and more convenient choices for our journeys, sometimes the private car is the most appropriate choice for some journeys. To address the impacts of car use on the environment and health, we need to embrace new technologies.

Alternative fuel vehicles offer reduced emissions compared to petrol and diesel counterparts and contribute to improved air quality and reduced greenhouse gas emissions. This is particularly important in our urban areas and where our air quality management areas monitor levels of particulate matter and nitrous oxide. This aligns with both our Air Quality Action Plan and our Climate Change Action Plan (2022) which sets out the need to urgently reduce carbon emissions from transport which includes the uptake of low/zero-carbon alternatives.

We need to ensure roll out of electric vehicle charging is accelerated across communities. This includes seeking range of opportunities for electric charging to support charging at residential locations, in shared transport hubs, rail and bus stations, in public car parks, businesses, and as part of new developments.

The transition to a sustainable and low-carbon transport system in Kirklees, is essential. The UK government's decision to phase out the sale of new petrol and diesel cars underscores the urgency of this transition.

This requires a comprehensive strategy encompassing infrastructure development for electric vehicles and emerging technologies, financial incentives, public awareness campaigns, and supportive policies to encourage the widespread adoption of alternative fuel vehicles.

This also applies to rail operations, freight and logistics vehicles as well as buses and public sector fleets such as refuse vehicles. In 2021 only 2% of the West Yorkshire bus fleet were zero emission. The ambition set out in the West Yorkshire Bus Service Improvement Plan is to operate a zero-emission fleet by 2036.

HOW WILL IT BE DELIVERED?

By working with businesses, residents and organisations, we will support in the development of infrastructure. We will foster a culture of preparedness and openness to alternative fuels and continue to work towards achieving a significant reduction in carbon emissions to be climate ready by 2038.

Policy AF-1

Support the development of comprehensive electric charging networks to encourage a transition to low/zero emission vehicles.

Policy AF-2

Support the movement to new technologies, including lower emission fuels to complement the electric vehicle network.

Policy AF-3

Encourage the take up of low/zero emission public vehicles including buses and taxi services to work towards decarbonisation and local air quality targets.

Policy AF-4

Support partners to deliver rolling stock and infrastructure upgrades such as electrification to limit harmful emissions from rail passenger and freight transport.



What next?

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Monitoring and Evaluation

The success of the Transport Strategy will be determined in a number of ways, including:

- Improved communications and engagement with our communities
- Incorporation of the Strategy's policies in decision-making and business-as-usual
- Development and implementation of the new policies
- Transport scheme delivery
- Planning for future transport schemes
- Continued alignment with external strategy partners as strategy is implemented

We will share information on transport schemes, policies, campaigns and engagement opportunities through Connecting Kirklees, our dedicated transport information channels. This will provide our residents, businesses and partners with up-to-date information on our progress and the contribution they can also make.

As the Transport Strategy becomes embedded in Council business, existing reporting streams will also incorporate updates to Scrutiny Committees and Cabinet including by Major Projects, Highways, Regeneration, Climate Change and Public Health services.

Targets around transport are set at a regional level in the West Yorkshire Local Transport Plan. Kirklees will continue to work closely with the Combined Authority and other districts to support and achieve these through implementation of our Transport Strategy.



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Kirklees COUNCIL

Simpler Recycling in Kirklees

Meeting	**Cabinet**
Date	**9 September 2025**
Cabinet Member (if applicable)	**Cllr Tyler Hawkins**
Key Decision **Eligible for Call In**	**Yes** **Yes**

Purpose of Report

This report will outline how Simpler Recycling legislation sits within the context of wider government circular economy policies, and to present background information that will be used by officers to create options for a Simpler Recycling compliant collection model.

To seek agreement that Kirklees will comply with Simpler Recycling legislation for residential recycling collections from 2028 through the collection of all compliant materials via the collection method required within the legislation, from the start of the new waste disposal and treatment contract in 2028.

The report also highlights how the decision regarding the Kirklees recycling collection model critically links with the new Integrated Resource & Waste Management Services procurement (IRWMS), which was approved by cabinet in April 2024.

Recommendations

- Cabinet is requested to approve that the waste service should begin planning for the implementation of a Simpler Recycling collection model, in line with legislative requirements.
- Agree that the service will implement a new model for collection recycling collections which will begin in 2028 following a return to Cabinet for approval to commence with the new contract.
- Cabinet agrees that officers will develop and present options for a future collection model that complies with Simpler Recycling legislation at the relevant time during the procurement process for the new Integrated Resource and Waste Management Services contract.

Reasons for Recommendations

- A decision is required to comply with Simpler Recycling legislation from 2028 to allow the service to model an effective and efficient collection model, which will be implemented following the end of the existing waste treatment and disposal model in line with the guidelines set out within the EPR funding.

• Enable the service to develop a compliant collection model that the council will adopt for the new disposal and treatment contract, starting in 2028. Bidders will be required to facilitate disposal and treatment in line with this model and legislation.
Resource Implication: • The design and implementation of a new collection model will be managed by the waste service from within current staffing resources. • The work will be delivered with staff support from the procurement, risk and legal services. Implementation resource may also be required once a collection model has been chosen. • This will include officer time, communications with residents and investment related to new containers and the treatment of the new recyclable materials such as glass, which will be agreed with the portfolio holder.

Date signed off by <u>Executive Director</u> & name	David Shepherd (26/08/25)
Is it also signed off by the Service Director for Finance?	Kevin Mulvaney (26/08/25)
Is it also signed off by the Service Director for Legal Governance and Commissioning (Monitoring Officer)?	Samantha Lawton (Approved by Karl Larrad and Martin Dearnley) (26/08/25)

Electoral wards affected: All wards

Ward councillors consulted: No

Public or private: Public.

Has GDPR been considered? Yes. There is no information in this report that falls under the General Data Protection Regulations.

1. Executive Summary

- Kirklees Council currently collects residual waste (grey bins) and mixed recycling (green bins) from all residential households within the district on a 2 weekly collection cycle, alternating between each collection.

- Kirklees Council currently accepts paper, card, cans, tins, pots, tubs, trays and plastic bottles as part of its domestic collections. Glass is recycled via a network of glass banks throughout the district.

- All local authorities within England, including Kirklees Council, are required to comply with the new Simpler Recycling legislation that comes into effect from the 31 March 2026. This legislation deals with recycling and food waste collections from households and businesses. The new legislation details which materials all local authorities within

England are required to collect, and how they are split between dry mixed recycling collection and fibres collection, as well as the mechanisms local authorities must use for the collection of food waste.

- This report discusses the household dry, mixed recycling (green bin) element of Simpler Recycling legislation.

- This report contains a high-level summary of the food waste aspect of Simpler Recycling, however detailed options for food waste collections will be presented fully in a separate paper to Cabinet at a later date.

- This report highlights the benefits that adopting a new recycling collections model will bring to residents and the council, along with any financial, technical and logistical challenges that the requirements of the new Simpler Recycling legislation may present.

- The report also outlines the importance of cabinet approval for officers to work up a recycling collection option that complies with Simpler Recycling legislation to allow dialogue and engagement with potential disposal contractors. This option will be published as part of the Integrated Resource and Waste Management Services (IRWMS) procurement, documents for which must be finalised by November 2025.

- The waste service is proposing a start date of the new collection service in line with the start of the next disposal and treatment contract in 2028, and that the period between now and implementation would be used to communicate to residents regarding the upcoming changes.

- Kirklees Council must also stipulate what materials are to be collected from the kerbside household recycling collection service and the method and frequency of these collections to gain the most competitive price for the new IRWMS contract. The IRWMS will begin in 2028.

2. Information required to take a decision

2.1 Background – policy context

In November 2024, the UK Government introduced legislation named Simpler Recycling to streamline recycling regulations across England. This aims to ensure consistent and standardised waste and recycling collections from all households, businesses, schools, and other premises such as hospitals.

Under the new requirements, local authorities must collect the following four waste streams:

1. **Residual waste** (non-recyclable)
2. **Paper and card** (collected separately where possible)
3. **Dry mixed recycling** – plastics (incl. plastic bottles, pots, tubs, trays and plastic film); glass; metals (incl. steel and aluminium cans, metal packaging tubes, foil); and food and drinks cartons
4. **Food waste** (collected weekly)

Whilst this is the default position of the government, councils still have the flexibility to collect these waste streams in the most appropriate way for their district or parts of the district. For example, retaining the option to collect paper and card with other dry recycling materials (co – mingled collections), if this can be demonstrated to be the most technically, environmentally and economically practical (TEEP) method of collection. No penalty will be given for co-collecting paper and card with other materials, where it is appropriate. Where a valid technical,

environmental or economically practical reason is not available, or any other materials are mixed into the designated streams may result in a lowered EPR payment.

Simpler Recycling is just one element of the governments overall circular economy strategy that also includes policies on:

- **Extended Producer Responsibility (packaging) (EPR). Introduced 2025**
  This makes manufacturers and producers financially and environmentally responsible for the packaging waste they generate and creates a funding mechanism for Local Authorities that collect this waste.

- **Deposit Return Scheme (DRS). Due 2027**
  This is an initiative that aims to incentivise the recycling of single use plastic bottles, steel and aluminium drinks cans.

- **Introduction of weekly food waste collections. Due 2026**

- **Organics to landfill ban. Due 2028**
  This aims to reduce methane emissions from landfill sites by stopping biodegradable waste such as food and garden waste from entering landfill.

- **Reduction in residual waste**
  50% reduction by 2042 (to reach a maximum of 287kg per person in 2042)

- **Emissions Trading Scheme (ETS). Due 2028**
  This monitors emissions from energy intensive industries such air travel. It may be extended to waste incineration facilities including Kirklees' Energy from Waste plant

These policies, plus further policies not listed here, aim to achieve the recycling of 65% of civic waste by 2035 and decarbonisation through greenhouse gas emissions savings of £11.8 billion across England.

These policies are also linked with Simpler Recycling and any decision for Kirklees must consider the interplay between these. However, the long-term interaction of these policies is currently unknown as details of some policies are yet to be finalised.

Examples of how the wider circular economy policies may impact on the implementation of Simpler Recycling in Kirklees, include:

EPR
The proportion of packaging waste – such as glass bottles, plastic tubs, cartons, paper/ cardboard, food and drink cans - recycled by Kirklees and how much remains in the residual waste bins will be used as part of the calculation to judge how effective and efficient Kirklees is at recycling. This will influence how much Kirklees Council is funded each year through the EPR system for handling this type of waste and for our contribution to the circular economy.

ETS
This will monitor fossil fuel emissions from the Kirklees energy from waste facility. Penalties are likely for above threshold emissions linked to petrochemical derived materials such as plastics. At the moment, plastics are found in our residual bins and in contaminated recycling. Both waste streams are incinerated through the energy from waste facility adding to these emissions.

DRS

This scheme will encourage drinks containers such as plastic water, pop and milk bottles and beer / soft drink cans to be recycled at dedicated recycling points. This means less of this material may go into the household green dry mixed recycling (DMR) bin, making room for other items such as glass or cartons.

Introduction of food waste collections

Food waste makes up an average of a quarter of the content of the waste in the residual bins in Kirklees. Mandatory food waste collections will displace most of this from the residual bins to new food waste caddies. The food waste collected will then be sent for recycling. This scheme is due to be introduced in Kirklees in 2028.

Recent government guidance also instructs that local authorities are not able to solely use community glass recycling banks to meet the simpler recycling requirement to collect glass. Glass must also be collected through household kerbside collections.

3. Implications for the Council

Kirklees will defer the full roll out of additional materials and the separating of fibres outlined in Simpler Recycling legislation until 2028. This is due to the limitations related to the current waste disposal contract and the timing of the new Integrated Resource & Waste Management Services (IRWMS) contract.

3.0.1 Existing Waste Disposal Contract

The current Kirklees Waste Disposal Contract is in year 28 of a 30-year waste PFI agreement. This contract, signed with SUEZ in 1998 and expiring in 2028 was focused on landfill diversion rather than recycling or waste minimisation.

For this contract, SUEZ operates and maintains several waste treatment facilities on behalf of the council, including:

- Energy from Waste (EfW) facility
- Material Recovery Facility (MRF)
- Two Transfer Stations (TS);
- Four Household Waste Recycling Centres (HWRCs)

The 1998 terms of the waste disposal contract agreed a limited range of target materials to be collected at the kerbside from households for recycling, these being:

Paper; card; plastic bottles; steel / aluminium cans.

In 2021, a Deed of Variation was made to the 1998 terms so that the following items could also be included in the household, kerbside recycling collection:

Plastic pots, tubs, trays.

To comply with Simpler Recycling, we must also collect the following additional materials from households:

Foil, glass, cartons, packaging tubes (eg puree, toothpaste) and plastic film (e.g. plastic bags, food coverings)

3.0.2 Aged Materials Recycling Facility (MRF)

The Kirklees MRF, built 25 years ago, does not have the technology or equipment to accept glass or plastic film.

The MRF will require investment to enable it to perform efficiently to meet the needs of additional material types.

The MRF also sits on a small land footprint with no scope to increase its capacity. It would be unable to process all the new materials or to accommodate different collection models - for example the Simpler Recycling requirement to bulk collect separated paper and cardboard - without investment.

Work is underway to prepare for the expiry of the existing waste disposal contract. This will culminate in the procurement of a new, modernised Integrated Resource and Waste Management Services (IRWMS) contract to begin in April 2028.

The use of the MRF will be a question asked of the market through the dialogue stages of the IRWMS procurement. This will help to identify the best available options to Kirklees Council, for example, investment in the existing MRF. Alternatively, the market may have other facilities with capacity for sorting dry recyclables which could enable the Council to utilise the MRF space for other waste related activities and efficiencies.

At the beginning of the new IRWMS contract in 2028, Kirklees will be in a position to implement the chosen collection model that reflects its decision regarding the Simpler Recycling legislation.

3.1 Council Plan

Delivering the new national requirements for Simpler Recycling is a designated priority within the 2025-26 Council Plan.

Expanding the range of recyclable materials for households, including glass, cartons, and foils, is expected to increase Kirklees' recycling rate. Furthermore, introducing a separate collection bin for paper and cardboard is intended to reduce contamination and enhance the recyclability of these materials. Both minimising contamination and improving the authority's recycling performance are central objectives of the Council Plan.

A core element of the council plan is to focus on getting the basics right through reliable fundamental service delivery, ensuring residents receive consistent and high-quality services. As a front-line operation serving every district resident, the waste service will be designed and recommended based on cost-effectiveness and operational efficiency. This approach supports the Council's priority to provide a financially sustainable service, rebuild financial reserves, and maintain a high standard of service for all residents.

3.2 Financial Implications

Officers will detail all costs when working up the options for a Simpler Recycling compliant recycling collection model. One off costs related to investment in the Materials Recycling Facility (to enable the treatment of the collected recycling), the purchase of new containers for recycling and communications to residents are expected to represent the main financial implications needed to comply with the new Simpler Recycling legislation.

3.2.1 Costs associated with the Materials Recycling Facility (MRF)

The MRF is a council owned asset managed by SUEZ until the end of the current Waste Disposal Contract in 2028. It will be around 27 years old at contract expiry with equipment and systems that reflect its age.

Investment in the MRF is expected to be needed for any new recycling collections options. This will be required either for an upgrade / rebuild of the facility, with modern sorting technology so that it can handle materials such as glass; decommissioning and repurposing if the market advises it to be more cost effective to use a third party, larger, modern treatment facility for domestic recycling materials; or ongoing maintenance for its current operations.

3.2.2 Funding for Costs Incurred by Simpler Recycling Legislation

Extended Producer Responsibility (EPR)

DEFRA expect that EPR payments to local authorities will cover the net costs of collecting and processing household packaging waste, including costs incurred due to new Simpler Recycling legislation, such as the purchase of new bins, communications to residents, upgrading existing MRFs, or haulage to a different treatment facility.

Kirklees Council will receive £6.6M for Year 1 of the Extended Producer Responsibility (EPR) for packaging payment in 25/26.

Ongoing yearly EPR calculations are difficult to forecast and from Year 2 (2026/27) will be made to Kirklees Council based in part on how efficient and effective our recycling collection service is. Any cost implications will be factored into the council's mid-term financial strategy as these become known, and currently we are forecasting a 10% year on year reduction in EPR payments for 26/27 and onwards.

Recent guidance from DEFRA explains that:

> 'Effective' is outcome focused, and will assess if our service recycles a reasonable proportion of packaging waste, considering certain factors (e.g. demography and geographical)
>
> 'Efficient' will assess if costs are as low as reasonably possible, reflecting the collection service type.

The current waste disposal contract provides a low recycling rate for a low cost compared to current market rates. This means that Kirklees performs poorly in terms of effectiveness when compared other authorities with similar characteristics. We can expect this to be reflected in lower EPR payments from 2026/27 until changes can be made, and to come under scrutiny from DEFRA to develop a plan to improve (An Improvement Action Process).

Officers will model and recommended a recycling collection option that they believe provides the best balance for an effective and efficient service and that maximises EPR payments.

3.2.3 Financial implications

Implementing a fully compliant collection model requires that all households will be provided with a second recycling bin specifically for the collection of paper and cardboard. The initial cost of the new residential recycling bins will be funded by the council and £517,000 has been allocated to this work in the mid-term financial strategy.

3.3 Legal Implications

Local authorities have a legal obligation under the Environmental Protection Act 1990 to arrange for collection and disposal of household waste. The Environment Act 2021 builds on this by introducing the Simpler Recycling relating to waste management as noted in the above report. Simpler Recycling legislation requires councils to comply with the new collection obligations in 2026.

Kirklees Council proposes to introduce the changes to its recycling collection to align with Simpler Recycling Legislation in 2028. This is because the changes will be built into the new Integrated Resource and Waste Management Services (IRWMS) contract that will begin in 2028.

Kirklees Council has a transitional arrangement agreed with the Department for Environment, Food and Rural Affairs (Defra) to delay food waste collections until April 2028. However, no such transitional agreements are available from Defra for the dry mixed recycling elements of Simpler Recycling.

This means that Kirklees council will have a period of time when it is not compliant with the recycling collection part of the new Simpler Recycling legislation. Non-compliance by 2026/27 may lead to a judicial review and/or enforcement action issued by the Environment Agency including a compliance notice, formal warning or fixed penalty notice depending on the severity and nature of the breach.

Emerging guidance from Defra gives us more clarity on the implications of non-compliance with the collection of target dry mixed recycling materials as set out in the Simpler Recycling legislation.

The most recent guidance update in May 2025 sets out the following:

- There is no mechanism in place to phase in compliance over time.
  This means that Kirklees Council (and all other local authorities) must collect glass, cartons, foils and metal tube packaging by 31 March 26, and plastic film by 31 March 2027.

- A recorded exemption due to Technical, Environmental or Economical Practicability (TEEP) issues can only be used for the co-collection of paper/card with other dry mixed recycling materials.
  This means that the council can choose to retain a co-mingled collection where necessary, for example if we can demonstrate issues with space for bins or that it is not technically possible to process separated paper/card.

- Defra has offered support from their implementation team, which is likely to contact those councils not meeting Simpler Recycling requirements by 31 March 2026. Defra wrote to local authorities in May 2025 to start this dialogue

Having a written assessment that demonstrates good decision making and a demonstrable plan to meet Simpler Recycling requirements by 2028 will help support any challenge the council may face.

The Council will comply with its Financial Procedure rules, Local Government Act 1999, Public Services (Social Value) Act 2012, Public Sector Equality Act (S.149 Equality Act 2010), Contract Procedure Rules and Procurement legislation when considering award of IRWMS as required.

3.4 Climate Change and Air Quality

Compliance with Simpler Recycling can be embraced as positive in both legal terms and also in relation to the council's efforts to meet its net zero emission target by 2038.

Maximising the items that can easily be recycled by householders in bins at their home and reducing the volume of waste that is incinerated through the Kirklees Energy from Waste facility (EfW), will support the movement towards net zero emissions.

Adopting an option that does not increase refuse collection vehicle movements will also mean a 'no change' position for air pollution and transport emissions from the cleansing service; whilst the collection of additional items for recycling and the continued efforts to address the contamination of recycling should lead to an overall improved carbon impact.

Wider, and linked work areas within the waste service, such as the current Resources and Waste Strategy, and the forthcoming Integrated Resource and Waste Management Services contract also support the council's aim to lessen harm to the environment.

3.5 Other (e.g. Risk, Integrated Impact Assessment or Human Resources)

3.5.1 Risk – Non -compliance

The council's current waste disposal contract uses the Kirklees Materials Recycling Facility that was built in 1998. Due to its now old configuration, it is unable to accept glass or plastic film. The intended procurement of the new Integrated Resource and Waste Management Services contract will provide solutions to the processing of glass and film and enable Kirklees to comply fully with the Simpler Recycling legislation that requires the collection of glass and film from householders.

As set out in the May 2025 Defra Guidance on Simpler Recycling, delaying Simpler Recycling compliance until 2028 may lead to Kirklees Council facing scrutiny from Defra, which may result in the need to agree to a recycling improvement plan and financial penalty through lowered EPR funding. Please see Section 3.3 above for the legal implications.

3.5.2 Risk – Operations

Fully compliant collections require that a second recycling wheeled bin or liner bag, specifically for paper and card, will be given to all households. At this stage, it is not clear what percentage of households, including communal properties will struggle to have space for a third wheeled bin.

Clear communications to residents in the lead up to the introduction of a new Simpler Recycling compliant collection service will be designed to discourage items such as glass or cartons being put into the recycling bins before the new service begins in 2028.

3.5.3 Risk – Integrated Resource and Waste Management Services (IRWMS) Contract

Any delay in the Council's decision regarding compliance with Simpler Recycling poses a significant risk to the IRMWS procurement timeline. The process is already constrained in order to meet the fixed deadline of March 2028, and the current contract has reached the maximum allowable extensions. Any delay introduces uncertainty around service requirements and the information bidders need to accurately price their tenders. This could result in either overly complex bidding conditions or inflated costs due to risk pricing.

4 Consultation

No formal consultation with residents has been undertaken at this time for Simpler Recycling compliance, due to this being a new legal requirement.

The waste service attended Environment and Climate Change Scrutiny panel in August 2025 to outline the legislation and the impacts of the changes on residents and the service. The Scrutiny panel raised concerns regarding the communication campaign preceding the roll out in 2028, which the service will consider when developing its future communication plan.

The legislation and background information has been presented to elected members throughout the months leading to this Cabinet meeting.

5 Engagement

Compliance with Simpler Recycling will enable better recycling opportunities for all residents.

Officers will refer to previous public engagement to shape and inform the options appraisal for the Simpler Recycling collections model. This includes the Kirklees Resources and Waste Strategy Engagement Survey that took place between October 2020 and January 2021.

7,212 people took part in the Waste Strategy Engagement survey and gave their opinions on the configuration of additional bins to collect recycling and the recycling of glass at the kerbside. The responses show us that although space was highlighted consistently as a concern, a three wheeled bin option was preferred, rather than separate boxes within wheeled bins or shared bins. Additional boxes were seen as too complicated and people preferred to maximise the space in the given recycling bins. 83% of respondents also said they would use a kerbside glass collection, although many people commented that they did not use a lot of glass. The data gathered here will enable us to create effective communications to residents that answer queries raised in the many pertinent comments received.

Following this engagement, a small-scale glass collection trial was introduced between November 2022 and May 2023 for 1,831 communal properties at 166 blocks of flats situated across all 23 wards and including council owned and private blocks. Residents did not recycle very much glass during this trial (12.74 tonnes) highlighting the importance of working with people and offering collections options that work both operationally and for residents. For example, collecting glass with other dry, mixed recycling is likely to be more viable than separate kerbside glass collections.

Once an option has been chosen, officers will work with the Corporate Consultation team to share the decision with communities and work together through engagement, to find solutions to any difficulties, such as space or reducing contamination.

Working with the team of Recycling Advisors, we will also engage with schools and communities in educational initiatives and information sessions as part of the roll out of any changes.

WRAP research and officer benchmarking findings from other local authorities recommends that to successfully work with residents and communities, it is vital to have a robust and comprehensive communications campaign before changes are introduced, during the roll out of new collections and after implementation for ongoing message reinforcement to help embed changes and new routines for all.

Additionally, our Recycling Champion network ensures that residents are actively involved in achieving the council's recycling and waste minimisation objectives. Furthermore, any changes to the recycling service presents an opportunity to promote wider recycling and reuse activities within Kirklees with our partners. For example, the Reuse shop, in collaboration with our partner Revive,

which has diverted 179 tonnes of items into the circular economy across its two Kirklees sites in 2024 alone.

Although no formal engagement has been undertaken at this time, the waste service regularly reviews feedback loops through its direct resident interactions and interactions with elected members, with feedback on current operations being used to inform future decision making. Feedback has been, and will continue to be reviewed, on areas such as round changes, service performance, resident complaints and communication campaigns.

6 Options

6.1 Options Considered

Due to the nature of the new legislation both non-compliance and compliance have been considered.

6.2 Reasons for recommended Option

From benchmarking activity undertaken and the understanding of the challenges and legislative picture presented above, the waste service is confident that a fully compliant model can be implemented with minimal revenue or operational implications, and EPR funding can be used to cover the initial capital outlay.

It is recommended that officers complete a TEEP (Technically, Economically & Environmentally Practicable) assessment to provide a rationale for continuing the co-collection of paper and card until 2028.

Delegating authority to the Executive Director for Place enables timely, compliant decisions on the collection model during the IRWMS procurement, preventing delays and ensuring adequate time for implementing the new contract.

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7 Next steps and timelines

The next key milestone dates for this item are:

9 Sept 2025	Cabinet meeting – Decision
Jan 2026	IRWMS Stage 1 Procurement Specific Questionnaire
May 2026	IRWMS Stage 2 Dialogue with bidders
Autumn 2026	Engagement with residents with a focus on areas identified with limited bin storage space

8 Appendices

Appendix 1
Benchmarking Summary

Seven local authorities took part in meeting-based benchmarking sessions with Kirklees Council officers to share their collection models and learning. These authorities were chosen to represent different collection models. Four authorities neighbouring Kirklees were approached, with three responding and giving their feedback. The learning from these authorities has shaped the collection options in this report. There were many recurring themes and messages and these are summarised below:

Collection configuration (recycling)	LA 1	LA 2	LA 3	LA 4	LA 5	LA 6	LA 7
Dry mixed recycling (DMR) inc. glass		Y		Y	Y	Y	Y
Dry mixed recycling incl. paper/card			Y				
Dry mixed recycling incl. glass & paper/card	Y						
Separated glass bin			Y				
Separated paper / card bin		Y		Y	Y	Y	Y
DMR 4 weekly		y		Y		y	
DMR 3 Weekly							Y
DMR 2 weekly	Y		Y		Y		

Mixed Dry Recycling + Glass

- Very few issues were highlighted for putting glass within a bin with other dry mixed recycling (DMR)
- No weight issues for handling bins with added glass to other recyclables were found by other authorities
- No noise issues for crews / residents. One authority had noise tested this.
- Standard refuse collection vehicles (RCV) were used
- No damage / wear and tear on vehicles noticed. Glass when combined with other dry recyclables such as plastics or cartons softened the impact of the glass within an RCV. It does not break up as much and cushions noise too.
- Broken glass on highway is rarely an issue – just a couple of one-off incidents
- No extra PPE needed but all authorities offered this as a matter of routine health and safety.
- Glass does not break up so much in RCV when combined with other DMR meaning the glass quality for re-melt / reuse is good

Separate paper and card

- A larger 240litre bin is preferred for paper/card by residents
- Data to be made available in the summer of 2025 on the value and grade of paper when combined with glass
- One local authority (LA) added cartons with paper/card

Finances

- Most LAs are working within tight budgets and try to balance compliance with efficiencies given their existing infrastructure
- No-one has sufficient funding

Comms / Roll out

- Trials related to bin types are often completed before a decision regarding implementation
- Roll out all collection changes together – for example changes to DMR and food waste
- A dedicated waste comms officer is vital
- Grey bins with different coloured lids are a popular choice
- Doing face to face communications or virtual but live comms is recommended
- Need really robust communications prior to, during and after rollout of any changes
- Gain support throughout the governance pathway

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Kirklees COUNCIL

Kirklees Council Lane Rental Scheme

Meeting:	**Cabinet**
Date:	**9 September 2025**
Cabinet Member (if applicable)	**Councillor Tyler Hawkins**
Key Decision **Eligible for Call In**	**Yes** **Yes**

Purpose of Report

A Lane Rental Scheme (LRS) is a regulatory framework that allows highway authorities to charge utility companies and contractors a daily fee for occupying the most traffic-sensitive roads at the busiest times. The aim is to incentivise faster, more efficient roadworks and minimise disruption to road users.

Kirklees Council has developed a LRS and would like to apply to the Secretary of State (SoS) for Transport for powers to operate its 'Scheme'. Applications to the Department of Transport must be submitted before 1 October 2025.

This report outlines the role of a LRS in managing highway works and seeks approval from Cabinet to delegate authority to the Executive Director (Place) in consultation with the Portfolio Holder Highways & Waste to consider feedback to the statutory consultation; determine the contents of the LRS, make an application to obtain those powers and if subsequently approved by the Secretary of State for Transport, implement the Scheme.

Recommendations

That Cabinet notes the commencement of the statutory consultation and delegates to the Executive Director (Place) in consultation with the Portfolio Holder (Highways & Waste) to:

- consider the results of the statutory consultation,
- determine the contents of the Lane Rental Scheme
- determine whether to make an application and of the timing of the submission to the Department of Transport (DfT),
- and if DfT/Secretary of State for Transport (SoS) approval is granted, to implement the Kirklees LRS
- determine the governance arrangements for the Surplus Income Board

- That Cabinet notes the content of the Integrated Impact Assessment noted in paragraph 3.5 of this report.

Reasons for Recommendations

- To enable due consideration of the findings of the statutory LRS consultation that concludes on 26 August 2025
- To enable the LRS contents to be reviewed and amended following the conclusion of the consultation prior to making an application to Department of Transport

- To determine whether an application to the Department of Transport is made in the current application period before 1 October 2025, is delayed until the next application period (31 March 2026), or not progressed.
- To enable, if approved by the SoS, the implementation of the Kirklees Lane Rental Scheme, with the aim of reducing disruption from road works on the busiest streets at the busiest times, improving air quality, and making journey times more reliable.

Resource Implications:

- The development of the Kirklees Lane Rental Scheme is expected to incur costs of £77,000 for specialist consultancy fees, plus internal officer fees.
- All development, operational, and evaluation costs should a LRS be implemented, can be funded from the income generated through the Scheme.
- A small number of additional staff resources (3 or 4 FTE's) are likely to be required to manage the additional activities and negotiations involved in operating the LRS. All operational costs are deductible from the revenue generated by lane rental.
- The Cost Benefit Analysis indicates a 2.26:1 positive benefit from the implementation of the LRS
- There is the potential to generate surplus income once all operational costs are deducted, however any estimates of income are uncertain as they are dependent on the degree of behavioural change afforded by the works promoters. All surplus monies must be reinvested in highways.

Signed	**Dates signed off ahead of Cabinet on 9 September 2025**
Mr David Shepherd Executive Director Place	30 August 2025
Mr K Mulvaney Service Director - Finance	1 September 2025
Ms Samantha Lawton Service Director - Legal, Governance & Commissioning (Monitoring Officer)	1 September 2025

Electoral wards affected: All wards affected.

Ward councillors consulted: Ward members have not been consulted on the proposed Kirklees Lane Rental Scheme.

Public or private: Public

Has GDPR been considered? There are no GDPR implications associated with this report.

1. Executive Summary

- The Kirklees Lane Rental Scheme (LRS) is designed as a strategic tool to drive behavioural change in how road works are planned and executed across the district. By introducing financial disincentives for disruptive works on critical roads during peak times, the scheme aims to reshape the practices of utility companies, developers, and internal council 'works' teams in the way in which they plan and deliver their works.
- Key behavioural objectives include the encouragement of proactive planning, collaborative working among works promoters, improved efficiency through faster more effective delivery of works, with a focus on "first-time fix" solutions - ultimately, a shift in organisational culture from all works promoters towards minimising disruption and maximising works delivery efficiency.
- A LRS provides enhanced accountability, including the delivery performance of the Council's own teams, as all works promoters are subject to the same rules, reinforcing a culture of fairness and responsibility.
- Expected outcomes include reduced traffic congestion and disruption, improved journey reliability, lower air-borne emissions and noise pollution due to fewer delays and better scheduling, an increased public satisfaction with roadworks management.
- The scheme offers discounts and waivers of charges for emergencies, nationally significant projects, and genuinely collaborative efforts.
- Transitional arrangements are provided to allow works promoters time to adapt their planning and delivery models to the new ways of working, and for internal restructuring of the Council's teams to be implemented to support more intensive engagement and negotiation with promoters.
- Developed with input from a Joint Working Group of utility companies and internal stakeholders.
- A statutory 8-week consultation runs from 30 June to 26 August 2025, and the feedback will inform the final LRS before submission to the Department for Transport (DfT).
- Financial implications include development costs of £77,000 consultancy fees, with additional internal staff costs on top. If implemented, all development and operational costs can be funded through the income generated.
- The proposed LRS indicates that the maximum daily charge for working on a restricted road at the restricted times is £2500 in line with the NRSWA and the Street Works (Charges for Occupation of the Highway) (England) Regulations 2012. Experience from other lane rental scheme operators is that the maximum charge is required to achieve measurable behavioural change from works promoters. Charge limits are set by government, and the Council has no discretion to increase the charges independently.
- The Cost Benefit Analysis of the Kirklees LRS and network of streets forecasts a 2.26:1 return, with the potential to generate additional income once the of initial set up fees, ongoing operational and evaluation costs are deducted. Any surplus income after running costs have been deducted must be reinvested in highways. A summary of the Cost Benefit Analysis is available in Appendix A to this report.
- The behavioural change driven by the LRS aligns with Kirklees Council's broader goals for a cleaner, greener, safer, and more efficient transport network, contributing to climate action and quality-of-life improvements.

2. Information required to take a decision

The Traffic Management Act 2004 (TMA) imposes a duty on all local traffic authorities to secure the expeditious movement of traffic on their road networks, and to facilitate the expeditious movement of traffic on other authorities' networks. Additionally, the New

Roads and Street Works Act (NRSWA) 1991 places a duty to coordinate street and road works on the highway.

This is commonly known as the highways network management duty.

Section 74A of the NRSWA and the Street Works (Charges for Occupation of the Highway) (England) Regulations 2012 provide the legislative basis for Lane Rental Schemes (LRS) to be implemented.

The objective of the LRS is to use the threat of significant charges to encourage better planned and delivered roadworks, to bring about collaborative working amongst works promoters, to produce efficient and effective infrastructure solutions, to improve highway safety, and to reduce traffic congestion and delay. It is a 'behavioural change' approach.

LRS charges would apply to all works promoters, including utility companies, other asset owners, private (developer) works, and our own highway authorities works. A LRS is effectively an enhancement to the existing Permit Scheme on a network of *critical streets* across the district, by which works promoters would be encouraged and incentivised to carry out their works at times that are less disruptive to the public. Further information relating to lane rental is available from the Department for Transport in the Lane Rental Schemes: Guidance for English Highway Authorities.

Kirklees Council already operates a Permit Scheme to manage and coordinate works and activities on the highway, which has been assessed as 'excellent' in the most recent Permit Scheme Evaluation, which is available on the Council's website.

There is no duty to implement LRS, although a growing number of local authorities are applying for powers, and both the previous and current governments have encouraged highway authorities to develop schemes.

All five West Yorkshire Councils are now developing LRS, with both Leeds City Council and Wakefield Council indicating their intention to make applications in September 2025. North Yorkshire Council made their application in March 2025.

The LRS restrictions would apply to 10% of the total length of the district's roads and would only apply during the time periods for that specific road. Works outside the restricted times would be subject to a permit under the existing Permit Scheme, but not Lane Rental charges as well.

If works on the LRS network are carried out during the restricted times when they could reasonably have been carried out at another time, then a daily charge of up to £2500 can be levied.

There is provision in the LRS documentation to outline opportunities for exemptions, fee waivers and reductions for matters such as emergencies (up to 48 hours), to support projects of national importance, and for activities where genuine collaboration has taken place to reduce the impact of works on the local community. Transitional arrangements are also identified to give works promoters the opportunity to plan for these changes.

Approval was granted by Executive Leadership Team on 16 April 2024 to develop and consult on a LRS for Kirklees that would strengthen existing highway network management coordination and compliance controls associated with street and road works.

The Kirklees LRS documents have been developed in conjunction with the statutory undertakers/utility companies in a specific Joint Working Group.

Additionally, a Memorandum of Understanding has been agreed with Kirklees Council Environmental Health Officers regarding potential concerns about noise impacts for works that may be redirected to nighttime or during the weekends.

As part of the application process to DfT, details of the governance arrangements that will be put in place for dealing with surplus revenues, including the arrangements for consulting representatives of street works undertakers on decisions about how those revenues will be spent.

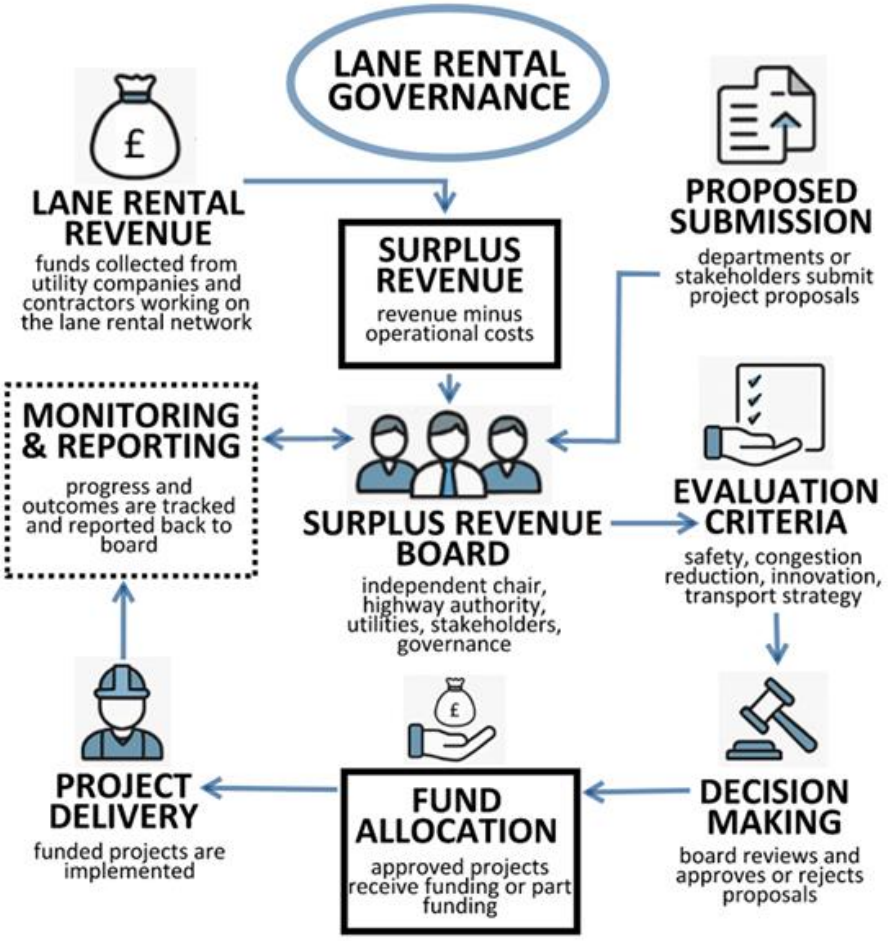
To determine the use of any surplus revenue; the Council will establish a Surplus Income Board, comprising of representatives of:

- the regional Joint Utilities Group (comprising water, gas, electricity and communications).
- Kirklees Highway Authority.
- An independent Board Chair.
- Representatives from the team that will evaluate opportunities or requests for funding and monitors and reports on the results.
- Requests for surplus income to fund appropriate projects will be submitted with a business case setting out estimated costs, benefits, expected outcomes, and timescales. If the person or organisation submitting the request for funding does not have the skills or resources to prepare business case, a request can be made to the team or body that administers the process for support.

The results of the initiatives undertaken will be published and an objective measurement will be recorded and published to identify the end benefit towards network management and road users in Kirklees.

The management of the revenues from the LRS will be separate from other council revenues.

Kirklees Council will keep an account of the revenues and costs associated to the LRS, including a record of the application of surplus revenues. These accounts will be published on an annual basis. The graphic below aims to demonstrate in simple terms how the Surplus Income Board would operate.



An annually published evaluation report for the Lane Rental Scheme is a requirement of the Scheme.

A statutory 8-week consultation of the Kirklees LRS commenced on 30 June 2025 and closes on 26 August 2025. The findings of this consultation are not expected to be fully known at the time this report needs to be published for Cabinet on 9 September, however feedback will be reported verbally at the meeting.

Given the application deadline and the timetable for Cabinet meetings, Members are asked to delegate to the Executive Director (Place) (EDP) in consultation with the Portfolio Holder for Highways and Waste (PH H&W), the decision as to whether an application is made to DfT on 30 September 2025.

Delegating the decisions in this report to EDP and PH H&W should provide sufficient time for the consultation responses to be assessed, and amendments to be made to the LRS documentation, if necessary, in time to achieve the DfT application deadline.

Postponing the decision to a future Cabinet meeting would mean that the submission would be postponed until the 31 March 2026 deadline, delaying the implementation of these controls until 2027 at the earliest.

3. Implications for the Council

3.1 Council Plan

Lane rental schemes are a modern approach to the management and coordination of works on the highway network and is encouraged by the government to bring about real behavioural change in the management of highway works. On 3 July 2025, the Government's Transport Committee has published their recommendations in their report Managing the Impact of Street Works that they are supportive of local authorities adopting lane rental schemes.

The LRS objectives are linked to current Council priorities that ensure that we 'get the basics right' and therefore aim to deliver a cleaner and greener environment, and one that contributes to the climate action objectives, ensuring that those parties that cause the most disruption to the traveling public when alternative arrangements are possible, pay a premium for taking that approach.

3.2 Financial Implications

The Council has committed £77,000 for consultancy fees, with additional internal staff time to develop the proposals, funded initially from the Highways Revenue Budget. If lane rental is implemented, all the development costs, the ongoing operational costs, and the costs of the scheme evaluation reports, can be funded from the income from the LRS.

A Cost Benefit Analysis calculation has been produced by specialist consultants to ascertain the likely operating costs and potential income relative to the volume of works in Kirklees and our proposed Lane Rental network. The CBA also forecasts the degree of behavioural change expected through works being moved to non-chargeable periods such as 'off peak' periods, evenings or weekend working.

The CBA indicates a 2.26:1 benefit to cost projection. This is a positive position and indicates that for every £1 invested, there is a £2.26 benefit to society from implementing the LRS. A summary of the CBA is provided in the Appendix A of this report, and a link to the full assessment is available in paragraph 4 of this report.

The CBA modelling has also indicated that allowing for works programmes being delivered in different ways, or not at all, some discounts and waivers being offered, the additional costs for the Highway Authority own works lane rental charges, and the scheme development and operating costs, the LRS could potentially generate some surplus income. It should be noted that the CBA is a statistical indicator and should not be used as a forecast of actual income. There are many reasons why these figures would change and therefore cannot be relied upon, not least that works promoters may change their behaviours and work at less disruptive times, and therefore not attract any lane rental charges.

It should be noted that 100% compliance from works promoters would mean that no additional income would be generated by the scheme, whilst there would still be the additional operating costs from the employment of the additional staff needed to work with the works promoters to encourage less disruptive ways of working. In addition, evaluation reports would be required to be produced and published annually.

Looking at experiences from those authorities that already operate lane rental schemes, our consultant has advised that it is very unlikely that 100% compliance would be achieved, despite the high charges involved.

It is anticipated that 3 or 4 additional staff at different levels in the organisation might be needed to manage the additional collaboration and coordination work required with the works promoters, and to manage the technical administrative and invoicing processes. The additional staff would work within the existing Network Management Streetworks Team that operates the existing Permit scheme. In the unlikely event that the LRS income does not cover the additional staffing costs, then the Streetworks Team budget will be required to fund these additional posts.

Any surplus income from LRS, after deducting those operational and evaluation costs, are then set aside by the authority and managed by the Surplus Income Board.

The Surplus Income Board can then assess and allocate funds for purposes intended to reduce the disruption or other adverse effects arising from road works and can be used for capital or revenue projects.

The current legislation precludes the use of lane rental surplus monies to be spent on highway maintenance activities; however, the government is currently reviewing primary legislation to enable at least 50% of surplus monies to be spent on highway maintenance.

In the interim, the following are examples of what the surplus can be spent on:

- investment in innovation and developing new products or disruption-saving techniques
- trials of new techniques and products and materials
- installing ‘pipe subways’ or ducting that enable apparatus to be accessed more easily and without disrupting traffic
- measures to improve the quality or accessibility of records, including the location of underground pipes, wires and other apparatus
- measures to help abate noise, pollution, or safety hazards arising because of works
- repairing potholes caused by utility street works
- implementing extraordinary measures to mitigate congestion caused by works, especially major works projects

The establishment of the Surplus Income Board will require transparent financial arrangements and governance that are still to be determined. Further work will take place on this matter as the application with the DfT progresses.

3.3 Legal Implications

Section 74A of the NRSWA1991 and the Street Works (Charges for Occupation of the Highway) (England) Regulations 2012 (as amended by the Street Works (charges for occupation of the Highway) (England) Amendment Regulations 2018 provide the legislative basis for Lane Rental schemes to be implemented.

Reg 7(3) requires an “Approved Authority” to keep and publish yearly accounts of sums recovered by charges including details of how net proceeds have been applied.

The Council must comply with the requirements for statutory consultation set out in the legislation with identified consultees and DoT Guidance: NRSWA 1991- Lane Rental Schemes (Jan 2012) and conscientiously consider the responses.

There is no duty to operate a lane rental scheme.

The Council must comply with its Public Sector Equality Duty under Section 149 Equality Act 2010.

The establishment of the Surplus Income Board will require transparent legal and governance arrangement that are still to be determined. Further work will take place on this matter as the application progresses.

3.4 Climate Change and Air Quality

LRS can contribute to climate change mitigation by reducing localised congestion, improving traffic flow, and encouraging more sustainable practices in roadworks. Faster works completion means less time idling in congestion, and a greater likelihood of 'first time fix' solutions.

3.5 Other (e.g. Risk, Integrated Impact Assessment or Human Resources)

The implementation of lane rental charges will bring with it additional and more intensive discussions with works promoters that cannot be achieved with the existing Permit Scheme staffing levels. It is anticipated that there will be a need for a small number of additional staff at a range of levels, to manage the scheme, assess permit applications, negotiate with works promoters, coordinate, and inspect their works on street. All operational costs are fully recoverable from the LRS income.

There is the potential for the LRS to reduce the income of the existing Permit Scheme (it is not permitted to charge for permits and LRS fees for the same works). As the two schemes will be delivered by the same Highways Streetworks team, the expectation is that an increase in income in one area will offset the decrease in the other.

There is also a requirement to charge all works promoters, including the council's own works promoters if they occupy a lane rental street during the restricted period. The LRS documentation provides for fee waivers and reductions for works that support investment in the highway asset and where safety or active travel benefits are being realised. Where the works do not meet these criteria, the council will also be required to amend their working practices to reduce the disruptive impact of their works or pay the lane rental charges. This may increase the cost of delivering the council's own works if those works are poorly planned and contribute to unnecessary disruption. This approach is key in the legislation as it demonstrates parity across all works promoters and establishes a works-planning principle that everyone should look to minimise the disruption caused by their works.

An Integrated Impact Assessment has been undertaken that considers the impact of the implementation of a LRS on those with protected characteristics, the environment and in compliance with the Public Service Equalities Duty. The key findings are that the greater control over the duration and timing of road works through Lane Rental will have a positive impact on those people that might struggle negotiating road works – specifically the young and elderly, the disabled and mobility impaired, and pregnant women. Some aspects of the environmental impact may also be positively impacted – air quality and greenhouse gas emission due to a reduction in traffic delays and congestion, but noise levels may be displaced to evenings and weekend periods as works promoters work outside of the busy traffic periods.

4. Consultation

The DfT requires authorities to undertake a statutory 8-week consultation of the Kirklees Lane Rental Scheme proposals prior to making an application for legal powers to operate. This consultation is with affected asset owners, utility companies, emergency services, transport provides and many more stakeholders; it is not a consultation that would involve members of the public.

The full list of documents being consulted upon are available on request and include:

- Covering Letter to Consultees
- Consultation Version of the Kirklees Lane Rental Scheme Document
- Consultation Version of the Kirklees Lane Rental Charges Policy and Table
- Consultation Version of the Kirklees Lane Rental Evaluation Plan
- Consultation Version of the Kirklees Lane Rental Cost Benefit Analysis (CBA)
- CBA - Appendix A – Lane Rental Streets List incorporating the relevant Traffic Sensitive Street criteria for the street
- CBA - Appendix B – Lane Rental Map. To access the map, please paste the following into your browser: https://mapping.kirklees.gov.uk/connect/analyst/mobile/#/main?mapcfg=%2FAnalyst%2FNamedProjects%2FLane%20Rental%20Network
- CBA - Appendix C – QUADRO Outputs Link
- CBA – Appendix D – QUADRO Results Summary (included as Appendix A to this report)

The statutory consultation commenced on 30 June 2025 and closes on 26 August 2025.

Whilst not a requirement of the statutory consultation, is recommended that a further opportunity for consultees to raise concerns is held mid-way through the consultation period. That meeting was held on 22 July 2025 and consultees were able to raise any queries about the proposals, and further clarification could be provided. The meeting was well attended and received.

5. Engagement

A specialist consultant in this field has been employed to guide and support Kirklees officers in developing a Scheme. Officers have also attended national roadshows, met with DfT senior officers, and other local authorities that have already or will be implementing their own schemes soon.

There is a good understanding amongst officers of what is required to achieve and operate an effective LRS.

As recommended in the lane rental guidance, the council established a Joint Development Group (JDG) with asset owners, statutory undertakers/utility companies and other stakeholders. The intention being to work together from the outset to develop a scheme that affected parties are satisfied with, prior to commencing the statutory consultation.

Invitations to participate in the JDG were distributed to around 200 relevant parties including neighbouring authorities, WY Combined Authority, the utility providers, asset owners such as Network Rail, and other special interest groups. Once established, the

JDG representatives worked together to develop a suite of documents that addressed everyone's concerns, as far as is reasonably practicable.

A separate internal officer Steering Group consisting of colleagues from Legal, Finance, Environmental Health teams was also established.

A Memorandum of Understanding was agreed with Environmental Health colleagues to ensure that arrangements surrounding complaints associated with noise from road works during the evening or weekends, is understood from the outset.

The Lane Rental Scheme proposals were also shared with the Environment and Climate Change Scrutiny board on 20 November 2024. The report is referred to in the Background Papers to this report.

It should be noted that the Kirklees Council LRS is being developed concurrently with the Leeds City Council Lane Rental Scheme. This approach has been welcomed by the utility companies both in time saving and consistency of scheme documentation. Wakefield Council has since progressed their scheme using the same approach and is looking to make their application in September 2025.

6. Options

Kirklees Council is not required to implement lane rental controls and can continue to use the existing Kirklees Permit Scheme to manage and coordinate activities on the highway; the 'do nothing' approach. This approach would not however deliver the greater controls and behavioural changes that are desired to improve highways safety and journey times, reduce air and noise pollution and carbon usage, and deliver the quality-of-life benefits that these controls can deliver and is therefore not recommended.

6.1 Options Considered

Whilst there are several examples of LRS, the Kirklees LRS has taken advantage of the lessons learned by the small number of authorities that are already operating lane rental schemes. The Kirklees Lane Rental Scheme has been developed to maximise the degree of behavioural change whilst acknowledging that asset owners do have an obligation to access and maintain their apparatus. The scheme documents illustrate that discounts and waivers are available for works promoters that collaborate or change the way they will work to minimise disruption.

There is an obligation to produce an annual evaluation report for lane rental schemes, which will identify whether the scheme is operating effectively or not.

6.2 Reasons for recommended option

These proposals align with the Council's vision to be a district that combines a strong, sustainable economy with a great quality of life leading to thriving communities, growing businesses, high prosperity, and low inequality where people enjoy better health throughout their lives. Additionally, the proposals contribute to the corporate outcomes, most notably those related to 'sustainable economy', 'safe and cohesive', 'clean and green' and 'efficient and effective', and priority to 'get the basics right'.

The proposed scheme is equitable in that applies to all those parties whose works impact on the public, however discounts and waivers for daily charges are built into the Scheme

for those occasions where alternative ways of working, or urgency of attendance, means that works cannot be delivered in any other way or at a time when alternative arrangements can be planned.

The specialist Cost Benefit Analysis has determined a favourable position of £2.26 of benefits to society realised for each £1 invested if lane rental is implemented in Kirklees.

The ability to reinvest any surplus income into highway projects, particularly those that support innovation and sustainability, offers the potential to reduce the disruption and cost of highway works on current and future projects and generations.

7. Next steps and timelines

Task	Dates/periods	Comments
Application to DfT (Secretary of State for Transport) & creation of Statutory Instrument by DfT if the application is approved	30 September 2025 submission. Assessment & drafting of SI could take 6+ months	Earliest completion April 2026
Confirm and publicise operational systems	Before LRS becomes operational	Ensure documentation, guidance, signposting, etc is available to works promoters
Raise awareness with internal project leads and works promoters of likely changes	Before LRS becomes operational	Support preparedness for potential changes to works delivery models and budgets
Review of resources required to operate the LRS	Before LRS becomes operational	Minor team restructure, recruitment of additional operational staff, and training.
Establish Lane Rental Surplus Board	Before LRS becomes operational	Establish governance procedures to manage and allocate any surplus income.
Trial/shadow running of LRS and transitional arrangements.	Earliest April 2026 for 3 months	Earliest operational date July 2026
Establish annual LRS Evaluation Report processes	1 year after LRS goes live	To establish and publish performance of the scheme and any benefits realised.

The Secretary of State for Transport can approve a scheme submitted by an authority, with or without modifications, or reject it. DfT will liaise with the authority if it requires modifications to be made; there is no requirement to reconsult if modifications are required.

8. Contact officer

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Operations Manager (Highways Network Management)
donna.hodgson@kirklees.gov.uk

9. Background Papers and History of Decisions

DfT: Lane rental schemes: guidance for English highway authorities.
The Kirklees Streetworks Permit Scheme – Year 3 Evaluation Report
House of Commons Transport Committee: Managing the impact of Street works
Kirklees Council 'Our Council Priorities' – 'Get the basics right'
E&CC Scrutiny 20 November 2024 - PROPOSED KIRKLEES LANE RENTAL SCHEME

10. Appendices

Appendix A: Kirklees Lane Rental Scheme Cost Benefit Analysis Summary

11. Service Director responsible

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Appendix A: Kirklees Lane Rental Scheme Cost Benefit Analysis Summary

Kirklees Lane Rental Scheme – Cost Benefit Analysis

EXECUTIVE SUMMARY

Kirklees Council is a major investor of public resources and as such, should ensure that new developments or services make a positive contribution to the local economy and society.
Any new proposal should always answer these two basic questions:

- What are the specific outcomes sought?
- Will these outcomes deliver a positive benefit to the local economy and society?

A Cost Benefit Analysis (CBA) is a decision-making tool that helps provide assurance around these questions by quantifying all costs and benefits in monetary terms.
Kirklees Council's Highways Team has been working on just such a new service and this CBA supports its introduction by demonstrating the positive financial outcome delivering its objectives will provide.
Minimising disruption is a key transport challenge for any Council and especially for a busy area like Kirklees.

The ability of people and goods to move freely around the highway network, meeting the needs of business, accessing essential services and for social and leisure purposes depends largely on the highway network operating effectively.

The proposed Kirklees Lane Rental Scheme tackles head-on one the major causes of disruption, developer, road and street works, collectively known as activities, in a robust and positive way and is a major opportunity to positively reduce disruption on the highway network.

The proposed Kirklees Lane Rental Scheme is designed to reduce the busy period volume and durations of activities and generally reduce the amount of activities undertaken at traffic-sensitive times by introducing a new Lane Rental Daily Charge.

The new Lane Rental Scheme is not intended to prevent activities necessary for the maintenance or improvement of the road network or the services running underneath it.
It is designed to introduce financial incentives to work at less disruptive times and more efficiently, completing works faster and delivering network operational effectiveness improvements.

Summary findings of the Kirklees Lane Rental Scheme Cost Benefit Analysis

Values based on 25 Year Operation of the proposed Scheme (2010 prices)	
Value of benefits to economy and society	£33,494,983
Set-up and operating costs	£14,802,026
Financial benefit to the local economy from introducing the Scheme	£18,692,958
Benefit to Cost Ratio	**2.26**

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Kirklees COUNCIL

Community Asset Transfer of the Hudawi Centre, Great Northern Street, Huddersfield, HD16BG ("the Property").

Meeting	**Cabinet**
Date	**9th September 2025**
Cabinet Member (if applicable)	**Cllr Turner (Portfolio Holder Finance and Regeneration)**
Key Decision **Eligible for Call In**	**No** **Yes**

Purpose of Report

This report requests that Cabinet considers and approves the Community Asset Transfer of the Property to BBSA (Black Business Support Agency) C.I.C ("the CIC").

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Recommendation

That Cabinet approve and delegate authority for the Service Director – Development, in consultation with Portfolio Holder - Finance and Regeneration, to negotiate and agree terms with BBSA (Black Business Support Agency) C.I.C for the grant of a 125 year lease for the Hudawi Centre and instruct the Service Director - Legal, Governance and Commissioning to enter into and execute all necessary documentation in connection with the grant of the lease.

Reasons for Recommendation

- The asset transfer of the Property supports the Council's ambitions of allowing local people and communities greater control over local assets and the services delivered from them.
- The grant of a long leasehold is in accordance with the Council's Community Asset Transfer Policy 2020.
- A long leasehold will give the CIC the security needed to satisfy grant funder requirements whilst ensuring that the building remains available to the local community for the long-term future.

Resource Implication:

- A revenue grant is payable in accordance with the Community Asset Transfer Policy 2020 on completion of the transfer: 2025/2026: £13,534; 2026/2027: £4,511
- The Council is foregoing a capital receipt of £322,000 (valuation as at July 2025)
- The transfer of the property delivers revenue savings approved as part of the 2025/26 Council budget. Full responsibility for management, repair, maintenance and insuring the property will pass to the CIC.

Date signed off by <u>Executive Director</u> & name	**David Shepherd – 22/082025**

Is it also signed off by the Service Director for Finance?	**Kevin Mulvaney – 27/08/2025**
Is it also signed off by the Service Director for Legal Governance and Commissioning (Monitoring Officer)?	**Karl Larrad on behalf of Samantha Lawton – 22/08/2025**

Electoral wards affected: Dalton

Ward councillors consulted: Cllr Munir Ahmed, Cllr Tyler Hawkins, Cllr Musarrat Khan

Public or private: Public

Has GDPR been considered? Yes, GDPR has been considered. The information in this report does not identify any individuals.

1. Executive Summary

- This report requests that Cabinet considers and approves the Community Asset Transfer of the Property to BBSA (Black Business Support Agency) C.I.C ("the CIC").

- The Property is located at Great Northern Street, Huddersfield, HD1 6BG and consists of a building with a car park and a small area of open space. The freehold of the Property is owned by the Council. Plan Reference 23-0181, attached in Appendix A, shows the boundary of the Property indicated by a red line.

- It is proposed that the Property is transferred by way of a 125 year lease under the Council's Community Asset Transfer Policy 2020.

2. Information required to take a decision

- The Hudawi Centre was opened in 1997 on a site formerly occupied by Beaumont Street School. Set over two floors the building comprises a large hall, training/meeting rooms and a kitchen/café/bar area. Externally the site includes car parking and a small grassed area of open space.

- The centre has been primarily used as a venue to support Council service needs alongside bookings for community events and activities such as dance classes, educational courses and using the facility for private and community events including birthday celebrations, funeral wakes and meetings etc.

- As part of the ongoing review of assets and operational services, it has been identified that there is no longer an internal Council need for use of the facility as alternative venues are now being used. The Property was declared surplus to requirements by the Council in November 2023 with the decision made to explore Community Asset Transfer in preference to open market disposal, acknowledging the history to the original development of the facility, its significance to the community and potential for it to further local social and economic objectives.

- The Council's Community Asset Transfer Policy was approved by Cabinet in September 2020. The Policy supports groups to transfer assets from the Council at nil consideration in order to further local social, economic and environmental objectives. A copy of the Community Asset Transfer Policy is attached in Appendix B.

- BBSA (Black Business Support Agency) ("the CIC") have submitted a robust application and business plan in line with the requirements of the policy. The application has been assessed and approved by a Panel of officers representing Corporate Landlord, Democracy, Policy and Partnerships, Risk and Public Health service areas.

- The CIC is an established organisation that was registered with Companies House on 29th April 2021. It is leading the application, and is who the lease will be granted to, but they are working in partnership with a consortium of third sector African and Caribbean organisations. The consortium is comprised of the following:

    - BBSA (Black Business Support Agency) C.I.C
    - Jamaican National Council Huddersfield
    - Building African Caribbean Communities
    - (BACC)
    - Unison Black Workers
    - Oasis Care Support Services
    - Education 2000
    - The Hudawi Centre Association of Churches
    - CSR Host Consulting

- The consortium will form and register a new Charitable Incorporated Organisation (name and address to be confirmed) upon notice of a successful asset transfer, the CIC will then reassign the lease to this new organisation within the first 12 months of the asset transfer.

- Their aim is to safeguard and transform the Hudawi Centre into a thriving, self-sustaining hub that provides a range of cultural, educational, economic, and social opportunities for Huddersfield's diverse communities, with a focus on honouring its role as the spiritual home of the African and Caribbean community.

3. Implications for the Council

3.1 Council Plan

The community asset transfer supports the Council plan and the outcomes for Shaped by People, Best Start, Well, Aspire & Achieve, Safe & Cohesive and Clean & Green.

3.2 Financial Implications

Valuation

Unrestricted Value

The unrestricted value is the best price reasonably obtainable for the property and should be expressed in capital terms. It is the market value of the land as currently defined by the RICS Valuation – Global Standards 2017 – VPS 4, except that it should take into account any additional amount which is or might reasonably be expected to be available from a purchaser with a special interest (a "special purchaser"). When assessing unrestricted value, the valuer must ignore the reduction in value caused by any voluntary condition imposed by the authority. In other words, unrestricted value is the amount that would be paid

for the property if the voluntary condition were not imposed (or it is the value of the property subject to a lease without the restriction).

The unrestricted value of the Hudawi Centre is: £322,000.

Restricted Value
The restricted value is the market value of the property having regard to the terms of the proposed transaction. It is defined in the same way as unrestricted value except that it should take into account the effect on value of any voluntary condition(s).

The restricted value of the Hudawi Centre is: £Nil.

Voluntary Conditions
A voluntary condition is any term or condition of the proposed transaction which the authority chooses to impose. It does not include any term or condition which the authority is obliged to impose, (for example, as a matter of statute), or which runs with the land. Nor does it include any term or condition relating to a matter which is a discretionary rather than a statutory duty of the authority.

The value of voluntary conditions in the proposed transaction is: £Nil.

Amount of discount given by the Council
The difference between the unrestricted value of the land to be disposed of and the consideration accepted (the restricted value plus value of any voluntary conditions).

The amount of discount in the proposed transaction is: £322,000

Pursuant to Section 123 of the Local Government Act 1972, the Council has a duty to obtain the best consideration that can reasonably be obtained for the disposal of land. However, 'The Local Government Act 1972: General Disposal Consent (2003) (Circular 06/03)' provides that a local authority can dispose of land that is not held for planning or housing purposes at an undervalue of less than £2 million without seeking a specific consent, provided the Council is satisfied that to do so will help it to secure the promotion or improvement of the economic, social or environmental wellbeing of its area.

Following assessment, Council officers are confident that the asset transfer of Property to the CIC will promote the social well-being of the Dalton Ward.

By granting the 125 year lease at a peppercorn rent the Council is foregoing a potential capital receipt of £322,000 for an open market disposal. This is somewhat mitigated by the broader community capacity benefits to that area of Huddersfield and the wider Dalton Ward. Following assessment, Council officers are confident that the asset transfer of the Property to the CIC will promote the social well-being within the Dalton Ward.

Other financial implications, revenue etc
<u>Capital</u>
Under the terms of the proposed lease, responsibility for repair, maintaining and insuring the property will pass to the CIC, the Council will therefore avoid future capital costs associated with the repair and maintenance of the asset.

Revenue
The transfer of this building delivers revenue savings approved as part of the 2025/26 budget.

In accordance with the 2020 Community Asset Transfer Policy, a grant equivalent to 15% of the average 2 year running costs (excluding staffing) will be paid on completion of the transfer and a grant equivalent to 5% the following year. This will have a revenue implication of £13,534 in 2025/26 and £4,511 in 2026/27.

3.3 **Legal Implications**

Compliance with Subsidy Control Act 2022
The granting of a lease at an undervalue to the proposed tenant on the proposed terms could constitute a subsidy under the Subsidy Control Act 2022 as it may permit a certain degree of commercial usage. In order to comply with the legislative requirements relating to a subsidy, the Council will either apply the 7 subsidy control principles to justify the giving of the subsidy or will grant the subsidy under the Minimum Financial Assistance exemption and report on this to the BEIS Transparency Database.

Local Government Act 1972; Section 123: Disposal of Public Open Space and Common Land
The property includes a significant area of Public Open Space. In order to comply with the Act, the Council is obliged to publish the intention to dispose of this land. Any objections will need to be considered by Cabinet.

3.4 **Climate Change and Air Quality**
There will be no impact on Climate Change and Air Quality.

3.5 **Other (e.g. Risk, Integrated Impact Assessment or Human Resources)**

Integrated Impact Assessment (IIA)
The integrated impact assessment has been published on the Kirklees Council website and can be found on the following link: IIA-725804808
.

4 Consultation

Policy and Partnerships, Democracy, Public Health and Risk
Each individual asset transfer is developed and assessed in consultation with colleagues in the Community and Third Sector Teams, Legal Services, Finance, Risk and Audit and Corporate Landlord.

Dalton Ward members have been engaged throughout the process and are fully supportive of the proposed transfer.

Given the Property's proximity to the Newsome and Greenhead Ward boundaries, Ward Members from these wards have been notified.

5 Engagement

Applicant groups are required to undertake community engagement as part of the community asset transfer process with the findings incorporated in the business plan.

The CIC have held two community engagement events as part of the process which have been attended by over 200 members of the local community, the proposed uses of the asset reflect the results of this consultation.

6 Options

6.1 Options Considered

a) Refuse the request for an asset transfer - refusal of the Asset Transfer could see the Property, and the services it would potentially deliver, lost to the local community.

For this reason officers are of the opinion that this is not the recommended option.

b) Transfer the site either freehold or leasehold – the Community Asset Transfer Policy 2020 allows for freehold transfers in exceptional circumstances. However, officers are of the opinion that this is not appropriate. Freehold transfer limits the Council's ability to remedy should there be a change in the organisation's circumstances or failure to fulfil its obligations.

Officers are of the opinion that the grant of a long leasehold for a period of 125 years is appropriate.

The lease will include a covenant that restricts the use of the Property to community use with provision for an element of commercial use if this is considered necessary for a successful business model. Commercial use of the asset will normally be restricted to a maximum of 30%.

It is proposed that the lease agreement be on the basis of a peppercorn rent for the full term, with the CIC being responsible for the full repair and insuring of the Property.

The lease will reserve rights for the Council to use the Property for the purpose of an Electoral Polling Station.

The grant of a long leasehold gives the CIC the security needed to satisfy grant funder requirements.

Officers recommend:

That Cabinet approve and delegate authority for the Service Director – Development, in consultation with Portfolio Holder - Finance and Regeneration, to negotiate and agree terms with BBSA (Black Business Support Agency) C.I.C for the grant of a 125 year lease for the Hudawi Centre and instruct the Service Director - Legal, Governance and Commissioning to enter into and execute all necessary documentation in connection with the grant of the lease.

6.2 Reasons for recommended Option

- The asset transfer of the Property supports the Council's ambitions of allowing local people and communities greater control over local assets and the services delivered from them.

- The grant of a long leasehold for a period of 125 years is in accordance with the Council's Community Asset Transfer Policy 2020.

- It will give the CIC the security needed to satisfy grant funder requirements whilst ensuring that the Property remains available to the local community for the long term future.

- The grant of a long lease provides the Council with remedies including forfeiture in the event that there is a breach of the terms of the lease.

7 Next steps and timelines

Subject to Cabinet approval, the Service Director – Development in consultation with Portfolio Holder - Finance and Regeneration will negotiate and agree terms for the grant of a 125 year lease of the Hudawi Centre, being the land and buildings shown edged red on Plan reference 23-0181, and instruct the Service Director - Legal, Governance and Commissioning to execute and enter into all necessary documentation in connection with the grant of a 125 year lease of the Hudawi Centre, Great Northern Street, Huddersfield, HD1 6BG to BBSA (Black Business Support Agency) CIC.

8 Contact officer

Mark Varley (Asset Strategy Officer)
mark.varley@kirklees.gov.uk

9 Background Papers and History of Decisions

Community Asset Transfer Policy 2020
Asset Review November 2023

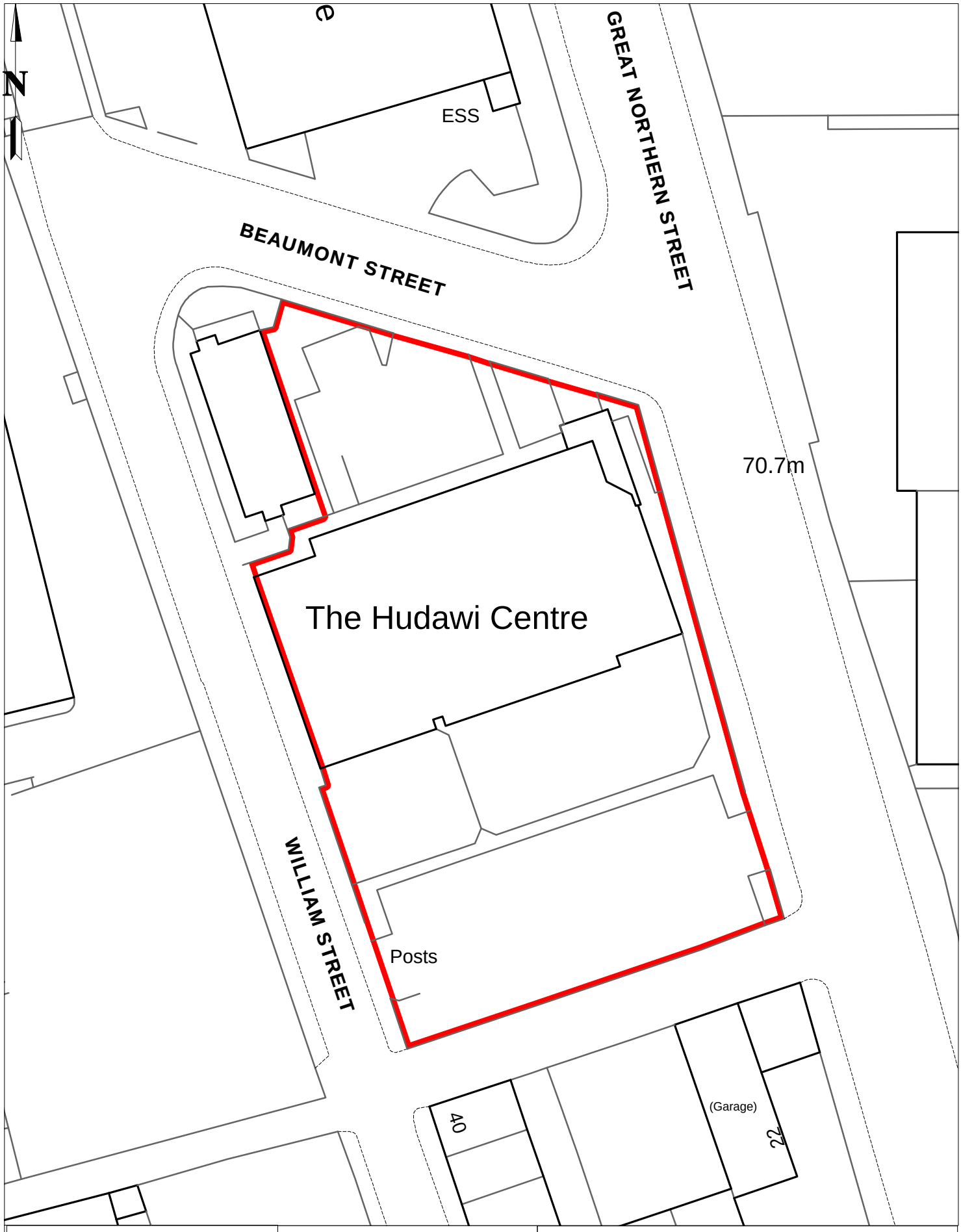
10 Appendices

Appendix A - Red Line Boundary plan (Ref. 23-0181)
Appendix B - Community Asset Transfer Policy 2020

11 Service Director responsible

Joanne Bartholomew
Service Director - Development

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Kirklees COUNCIL

ASSETS & ESTATES

Plan No: 23-0181
Scale: 1:500

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Community Asset Transfer Policy

September 2020

Introduction: our aspirations for communities and the role of asset transfers

Community Asset Transfer (CAT) is the transfer of ownership and management of public land and buildings from the Council to a community organisation. Assets are transferred at less than market value for local social, economic or environmental benefit.

The primary purpose of CATs in Kirklees is to invest in communities, and we will go the extra mile to help communities achieve their aspirations. This means:

- transfers are a way to empower communities;
- we will find ways to promote asset transfers in our place-based community engagement work as an option for communities to achieve their aspirations; and
- we will build and maintain a relationship with groups before, during, and after transfer to ensure that the asset continues to be available for the community.

As part of the vision for Kirklees to be a great place to live, work, and invest, the Council works with communities to build community capacity and realise community aspirations for their places. CATs are one way in which our communities can be enabled to realise these aspirations and deliver our shared outcomes. By unlocking the power of community, CATs help to build a more inclusive local economy and enable people to live in better health for longer.

Community-owned and community-run assets act as a catalyst for realising local aspirations by:

- improving local assets: community groups investing in and/or attracting investment for improving local assets;
- supporting local initiative: supporting and building on local community initiative and enthusiasm, which encourages community participation and volunteering; and
- building new connections: local citizens and groups developing new partnerships in their communities (including to support community cohesion).

We have delivered CATs since 2013. As of August 2020 there have been a total of 21 successful CATs across Kirklees.

Recognising the benefits they can deliver, we want to ensure that all our CATs are sustainable. We also want to be transparent with organisations interested in CATs. In line with these commitments, this policy sets out a robust process and offer that has been developed in accordance with the knowledge, skills, and experience we have gained since CATs were introduced in 2013.

This Policy sets out our framework for enabling and managing CATs, specifically:

- why we transfer assets;
- what assets will be considered for transfer;
- the eligibility criteria;
- the conditions of transfer; and
- how requests will be processed.

'We're Kirklees'

'We're Kirklees' is our name for the way local people, organisations, and places can work together to deliver our vision for Kirklees and our Seven Shared Outcomes, which are set out in our Council Plan (2020-21). 'We're Kirklees' means we're:

- **Working with people, not doing to them:** organisations working together with people and communities to enable them to solve problems and make the most of their strengths and opportunities;
- **Working with partners:** organisations sharing knowledge, skills, and resources to work smarter together; and
- **Place-based working:** recognising that each town, village, and community has its own unique strengths and opportunities that can help them solve problems locally, and working to support and enable these.

Eligibility and Conditions for Sustainable CATs

Eligible assets
The assets made available for Community Asset Transfer (CAT) will be at the discretion of the Council, but may include public service buildings and land, such as civic halls, community centres, heritage assets, libraries, open spaces, and parks. Assets which are still required strategically by the Council cannot be made available for transfer.

Assets might be identified as of potential community benefit by the Council or by communities themselves, and the Council encourages community discussions about local aspirations and how local assets might support those.

Eligible organisations
An organisation is eligible if their primary purpose is social, charitable, or community benefit, which can include:

- a charity;
- a community interest company;
- a cooperative(link);
- a social enterprise; or
- an unincorporated association (although would need to be incorporated to complete a transfer).

The Council may consider and prioritise expressions of interest for asset transfer to Town and Parish Councils, acknowledging the advantages of democratically elected governance and representation.

Expressions of interest are welcomed from any community organisation that meets the following criteria:

- their primary purpose must be for community benefit;
- they must be open to and demonstrate an inclusive approach to all members of the wider community;
- they must have the skills and capacity to effectively manage the asset and deliver services;
- they must be financially stable and able to demonstrate good governance by operating through transparent and accountable processes; and
- the proposals for the asset must be clear (so the group can demonstrate all of the above),

The Council will encourage collaboration between community organisations and the sharing of assets to optimise both social value and value for money across the District. Applications will not be considered where an asset transfer is likely to compete with and potentially compromise an existing community facility.

If two or more expressions of interest are received the Council will work with the interested parties to develop options and understand the best way forward for the asset. Where appropriate, parties may be encouraged to collaborate and submit a joint application. We will invite viable proposals to proceed to the full application stage.

Conditions of transfer

To ensure that the property transferred is retained by the community for community benefit (e.g. the purpose for which the CAT was approved), assets will be transferred by the grant of a long term leasehold rather than freehold. In exceptional circumstances the Council may consider the transfer of a freehold interest.

The lease will be agreed for a nominal annual rent. It will include legal provisions (covenants) to ensure that the asset is restricted to community use, and may include provisions to ensure it remains open to community use (with a minimum number of hours of community use as agreed between the parties).

In some cases, these provisions will allow some commercial use, when that supports the sustainability of the business model and thereby the community benefit. Cabinet will decide when commercial use is appropriate as part of the application process.

In the final agreement, the Council may reserve the right to use the asset where it is required to deliver a statutory function or strategic ambition, e.g. as a library or on occasions for a polling station during elections or emergency planning purposes.

Upon completion of the transfer, the organisation will be fully responsible for:

- upkeep, repair and maintenance of the asset;
- all running costs, including insurance; and
- compliance with statutory inspections, health and safety requirements, and other relevant legislation.

Following asset transfer, organisations are encouraged to allow other community groups to use the space in the asset (which might also generate income for the organisation). To ensure the asset is of maximum possible community benefit, the group controlling the asset should not discriminate between groups based on protected characteristics (e.g. sex, disability, race, sexual orientation, gender assignment, religion, etc.).

The CAT application process

1. Initiating a CAT application with an Expression of Interest
A CAT application must begin with an expression of interest from a community organisation.

Eligible organisations (see 'Eligible Organisations' above) can submit expressions of interest relating to any Council-owned asset they believe to be of potential community benefit and which is eligible as per this policy.

To submit an expression of interest an Eligible Organisation need not be managing or operating from the asset.

The Council may also advertise surplus assets inviting expressions of interest for asset transfer.

The Expression of Interest form can be found here:

- http://www.kirklees.gov.uk/beta/community-assets/community-asset-transfers.aspx

2. Assessment of an Expression of Interest
The Council will decide if both:

a) the asset in question is available for CAT; and
b) the group expressing interest is suitable and/or ready for CAT.

If a group is not ready for CAT, they will be signposted to additional support from the Council or other partners.

Council officers will aim to assess expressions of interest within four weeks of receiving them.

If the Council accepts an expression of interest, the applicant group will be invited to submit a full application (see below).

Acceptance of an expression of interest does not commit the applicant or the Council to the transfer of an asset.

3. Full Application
Applicants invited to submit a full application will receive support from the Council either directly or through external organisations commissioned by the Council. Applicants will also be encouraged to access support from other organisations.

The Full Application Form can be found here:

- http://www.kirklees.gov.uk/beta/community-assets/community-asset-transfers.aspx

The full application must include detailed information about the applicant group and a fully detailed and robust business case. Applicants invited to progress to this stage can apply to the Council for a grant of up to £5,000 to assist with professional or legal costs associated

with the development of the application. In large or more complex cases, applicants may be invited to apply to the Council for a grant of up to £10,000.

The following information must be included in all full applications:

- the legal structure of the applicant group;
- the experience and skills of the Board/Managing Group and their capacity to manage the asset;
- the proposed use of the asset and how this will support the Council's objectives and benefit the community;
- evidence that the local community has been consulted and the application reflects the needs identified in that consultation;
- budget/financial projections for the group and its use of the asset in question; and
- details of any condition works needed to the asset and the source and availability of capital grant funding.

Failure to provide the required information will lead to an application being delayed or rejected.

We will agree a timescale for submitting a full application with the applicant. Typically, we will expect an application to be submitted within six weeks, but we will agree a timescale that reflects the size and complexity of the asset, since applicants will likely require longer to compose applications for bigger and more complex assets.

Applications are assessed by council officers and partners in accordance with a scoring matrix, which is available online.

The following financial support is offered by the Council:

i. Development Grant

Applicants invited to progress to full application stage can apply to the Council for a grant of up to £5,000 to assist with professional or legal costs associated with the development of the application. In larger, more complex cases, applicants may be invited to apply to the Council for a grant of up to £10,000.

ii. Support towards capital works

Where assets require urgent condition works or physical adaptations to improve accessibility, applicants can apply to the Council for a grant. Any request for grant funding must be made at the Full Application stage and set out clearly within the applicant's business plan. The grant application will be considered by the Council's Cabinet in conjunction with the CAT application. Examples of urgent condition works/accessibility works could include boiler replacement, roofing works, window replacement, ramps, steps, and accessible toilets.

The Council will continue to consider requests for loans to match fund external grants or financing (which may include a groups cash reserves) for the development of assets.

Applications can be made at the Full Application stage and also following completion of a transfer. Applications must be supported by a full business plan evidencing the applicant's ability to repay the loan over the agreed term.

Other information on external sources of funding is available on request.

iii. Revenue grant

The Council will pay a two stage revenue grant to each successful applicant following completion of the transfer. The grant will be calculated based on the previous operational running costs (excluding staffing) for the asset.

A grant equivalent to 15% of the average running cost will be paid on completion of the transfer and a further grant equivalent to 5% the following year.

4. Cabinet Approval

If the application is satisfactory, officers will then seek the approval and authority of the Council's Cabinet (link) for the Council to carry out the asset transfer.

5. Finalising the terms of the asset transfer

Following Cabinet approval, Council officers will work with the applicant to draw up heads of terms for all the documents that form part of the asset transfer. These documents will comprise of some or all of the following:

(a) Lease (or in exceptional circumstances a freehold transfer deed);
(b) Polling station agreement;
(c) Emergency planning agreement;
(d) Grant Agreement; and/or
(e) Loan Agreement

When heads of terms have been agreed, the Council's legal department will draw up all the required documents, and then negotiate and agree the terms of the documents with the applicant's solicitors.

6. Completion

When the documents are in an agreed form, they can then be completed, and the asset transfer will then come into effect.

Indicative Timescales

The full process can take 10-12 months.

Stage	Who is responsible	Indicative Timescale
1. Initiating a CAT application with an Expression of Interest (EOI)	Applicant	N/A (initiates CAT application)
2. Assessment of an Expression of Interest	Council Officers	4 weeks
3a. Full Application & Business Case (Composition)	Applicant	6-12 weeks (a longer period may be agreed dependent on the size and complexity of the asset)
3b. Full Application & Business Case (Assessment)	Council Officers	4 weeks
4. Cabinet Approval	Council Officers Cabinet	6 – 10 weeks
5. Finalising the terms of the Asset Transfer	Council Officers	6 – 8 weeks
6. Completion	Council Officers Applicant	12 weeks

All timescales are only indicative. It is acknowledged that CATs may be delayed for a number of reasons, including:

- complexity and size of the asset being transferred;
- further research required to support the application;
- legal processes involved;
- capacity and availability of people; and/or
- Council Service Reviews.

Changes from the previous policy

This policy supersedes our 2017 Community Asset Transfer Policy. The key changes since then are summarised below.

The change	Our old policy	Our new policy	Why was this change made?
All transfers are with long leaseholds by default	The Council used to transfer buildings differently to land, with buildings transferred freehold and land on long leaseholds.	Our default presumption is now to transfer all assets (land and buildings) on a long leasehold. Freehold transfers will be considered in exceptional circumstances and will be at the discretion of the Council.	Long leaseholds ensure that the asset remains available to the community by providing the Council with remedies in the event that the applicant does not fulfil their obligations with respect to the management of the asset or there is a breach of the terms of the lease. The grant of long leaseholds still gives applicants the security needed to satisfy grant funders.
More financial support for applicants invited to the Full Application stage	We used to offer a grant of up to £5,000 to cover legal costs and fees associated with the application.	In exceptional cases the Council will now offer up to £10,000.	Some cases require extra support because of their size and complexity.
More financial support for successful applicants	We used to offer a grant in the first year after a transfer equivalent to 15% of the asset's running cost (excluding staffing costs).	We now offer a grant in the first and second year after a transfer. The first year grant remains at 15%. The second year grant is 5%.	This will provide extra post-transfer support that will assist with the running of the transferred asset and increase the likelihood of sustainable asset transfer.

	We used to offer applicants a loan option for up to £100,000 match funding towards capital improvements to the asset. Loan applications had to be submitted at the full application stage of the process. Applications would not be considered post transfer.	The Council will now offer an option of grant funding and loans. Groups will be able to apply for a grant to fund urgent condition works or physical adaptations to improve accessibility. Examples of these works may include boiler replacement, roofing works, window replacement, ramps, steps, and accessible toilets. The Council will now consider requests for loans to match fund external grants and financing, prior to and following completion of the asset transfer, for groups wanting to develop assets.	The introduction of a grant will further support the viability of community asset transfers, allowing groups to invest in urgent condition/accessibility works where needed to bring assets back into use. Post transfer loans will provide added flexibility to groups intending to carry out capital improvements to assets, ensuring that they remain available for public use and sustainable in the long term.

More proactive strategic approach to CATs	We used to transfer assets primarily when they were surplus to our service requirements. Assets were also sold to raise funds for important Council services.	We will now also encourage community groups in our community engagement to proactively identify assets they need to solve local issues and to achieve community aspirations. Where asset transfers aren't possible, groups will be signposted to support within or external to the council to ensure that we build on their aspirations for their communities.	As set out in the Corporate Plan (link), we're now working more with people and doing less to or for them, working more in place-based ways led by local community aspirations and valuing the diversity of perspective and identities that make up local places. This requires that we proactively encourage community organisations to think about the assets they need to achieve these aspirations.

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Kirklees COUNCIL

Community Asset Transfer of the DRAM Centre, Ridgeway, Dalton, Huddersfield, HD5 9QJ ("the Property")

Meeting	**Cabinet**
Date	**9 September 2025**
Cabinet Member (if applicable)	**Cllr Turner (Portfolio Holder Finance and Regeneration)**
Key Decision **Eligible for Call In**	**No** **Yes**

Purpose of Report

This report requests that Cabinet considers and approves the Community Asset Transfer of the DRAM Centre ("the Property") to Moldgreen ARLFC (DRAM Holdings) Community Interest Company ("the CIC").

Recommendation

That Cabinet approve and delegate authority for the Service Director – Development, in consultation with Portfolio Holder - Finance and Regeneration, to negotiate and agree terms with Moldgreen ARLFC (DRAM Holdings) for the grant of a 125 year lease for the DRAM Centre and instruct the Service Director - Legal, Governance and Commissioning to enter into and execute all necessary documentation in connection with the grant of the lease.

Reasons for Recommendation

- The asset transfer of the Property supports the Council's ambitions of allowing local people and communities greater control over local assets and the services delivered from them.
- The grant of a long leasehold is in accordance with the Council's Community Asset Transfer Policy 2020.
- A long leasehold will give the CIC the security needed to satisfy grant funder requirements whilst ensuring that the building and sports pitches remain available to the local community for the long-term future.

Resource Implication:

- A revenue grant is payable in accordance with the Community Asset Transfer Policy 2020 on completion of the transfer: 2025/2026: £8,826; 2026/2027: £2,942
- The Council is foregoing a capital receipt of £290,000 (valuation as at July 2025)
- The transfer of the property delivers revenue savings approved as part of the 2025/26 Council budget. Full responsibility for management, repair, maintenance and insuring the property will pass to the CIC.

Date signed off by <u>Executive Director</u> & name	David Shepherd 22 Aug 2025

Is it also signed off by the Service Director for Finance?	Kevin Mulvaney 27 Aug 2025
Is it also signed off by the Service Director for Legal Governance and Commissioning (Monitoring Officer)?	Karl Larrad on behalf of Samantha Lawton 29 Aug 2025

Electoral wards affected: Dalton

Ward councillors consulted: Cllr Munir Ahmed, Cllr Tyler Hawkins, Cllr Musarrat Khan

Public or private: Public

Has GDPR been considered? Yes, GDPR has been considered. The information in this report does not identify any individuals.

1. Executive Summary

- This report requests that Cabinet considers and approves the Community Asset Transfer of the Property to Moldgreen ARLFC (DRAM Holdings) Community Interest Company ("the CIC").

- The Property is located at Ridgeway, Dalton, Huddersfield, HD5 9QJ. It consists of a sports pavilion building, sports pitches, multi-use games area and a large car park. The freehold of the Property is owned by the Council. Plan Reference 24-0162, attached in Appendix A shows the boundary of the Property indicated by a red line.

- It is proposed that the Property is transferred by way of a 125 year lease under the Council's Community Asset Transfer Policy 2020.

2. Information required to take a decision

- The Dalton, Rawthorpe, and Moldgreen (DRAM) Sport & Community Centre was built in 2004 as part of a government funded regeneration scheme. A two-storey, steel framed building, it comprises a large function room with bar/kitchen, meeting/conference facilities, changing rooms and WC facilities. Externally the centre is made up of sports pitches, a multi-use games area and large car park.

- The centre has been primarily used as a venue to support Council service needs, with additional uses/bookings made by the wider community and sports teams. It supports local Rugby and Football clubs, providing changing and welfare. The Property was declared surplus to requirements by the Council in November 2023 with the decision made to explore Community Asset Transfer in preference to open market disposal, acknowledging the potential for it to further local social and community objectives.

- The Council's Community Asset Transfer Policy was approved by Cabinet in September 2020. The Policy supports groups to transfer assets from the Council at nil consideration in order to further local social, economic and environmental objectives. A copy of the Community Asset Transfer Policy is attached in Appendix B.

- Moldgreen ARLFC (DRAM) Holdings Community Interest Company (“the CIC”) have submitted a robust application and business plan in line with the requirements of the policy. The application has been assessed and approved by a Panel of officers representing the Corporate Landlord, Democracy, Policy and Partnerships, Risk and Public Health service areas.

- The CIC is a newly established organisation that have been set up to lead the asset transfer application, they were registered with Companies House on 17th January 2024.

- The proposal is to maintain and manage the site for use by the local community. The strategic aims are to promote community engagement; provide educational resources; foster youth development; enhance health and wellbeing; strengthen community networks and promote volunteering.

- The CIC plan to extend the community offer available at the centre to include the following activities/services:

    - A drop-in centre to offer a safe/warm space for vulnerable groups
    - Youth Clubs
    - Educational workshops and training courses
    - A weekend café
    - Social and community events such as Craft Fairs, Seasonal events and parties, skills camps, school holiday camps.

- Board members of the CIC are also trustees of Moldgreen Amateur Rugby League Football Club. The rugby club, which has been in existence for over 60 years, currently operates out of the DRAM Centre and provides opportunity for the local community to participate in sports, fitness, educational and social activities. It is the CIC’s intention that the use of the DRAM Centre by the rugby club will continue.

- The rugby club plans to expand their rugby offer to further age groups and introduce female rugby from juniors to open age. They intend to work with the Rugby Football League to become a Community Wellbeing Hub. This is an accreditation programme aimed at building stronger community clubs who are able to play a greater role in delivering local social impact activities, whilst providing an additional source of sustainability to the club.

3. Implications for the Council

3.1 Council Plan

The community asset transfer supports the council plan and the outcomes for Shaped by People, Best Start, Well, Aspire & Achieve, Safe & Cohesive and Clean & Green.

3.2 Financial Implications

Valuation

Unrestricted Value

The unrestricted value is the best price reasonably obtainable for the property and should be expressed in capital terms. It is the market value of the land as currently defined by the RICS Valuation – Global Standards 2017 – VPS 4, except that it should take into account any additional amount which is or might reasonably be expected to be available from a purchaser with a special interest (a "special purchaser"). When assessing unrestricted

value, the valuer must ignore the reduction in value caused by any voluntary condition imposed by the authority. In other words, unrestricted value is the amount that would be paid for the property if the voluntary condition were not imposed (or it is the value of the property subject to a lease without the restriction).

The unrestricted value of the DRAM Centre is: £290,000.

Restricted Value
The restricted value is the market value of the property having regard to the terms of the proposed transaction. It is defined in the same way as unrestricted value except that it should take into account the effect on value of any voluntary condition(s).

The restricted value of the DRAM Centre is: £Nil.

Voluntary Conditions
A voluntary condition is any term or condition of the proposed transaction which the authority chooses to impose. It does not include any term or condition which the authority is obliged to impose, (for example, as a matter of statute), or which runs with the land. Nor does it include any term or condition relating to a matter which is a discretionary rather than a statutory duty of the authority.

The value of voluntary conditions in the proposed transaction is: £Nil.

Amount of discount given by the Council
The difference between the unrestricted value of the land to be disposed of and the consideration accepted (the restricted value plus value of any voluntary conditions).

The amount of discount in the proposed transaction is: £290,000.

Pursuant to Section 123 of the Local Government Act 1972, the Council has a duty to obtain the best consideration that can reasonably be obtained for the disposal of land. However, 'The Local Government Act 1972: General Disposal Consent (2003) (Circular 06/03)' provides that a local authority can dispose of land that is not held for planning or housing purposes at an undervalue of less than £2 million without seeking a specific consent, provided the Council is satisfied that to do so will help it to secure the promotion or improvement of the economic, social or environmental wellbeing of its area.

Following assessment, Council officers are confident that the asset transfer of Property to the CIC will promote the social well-being of the Dalton Ward.

By granting the 125 year lease at a peppercorn rent the Council is foregoing a potential capital receipt of £290,000 for an open market disposal. This is somewhat mitigated by the broader community capacity benefits to that area of Dalton, Rawthorpe & Moldgreen and the wider Dalton Ward. Following assessment, Council officers are confident that the asset transfer of the Property to the CIC will promote social well-being within the Dalton Ward.

Other financial implications, revenue etc
<u>Capital</u>
Under the terms of the proposed lease, responsibility for repair, maintaining and insuring the property will pass to the CIC, the Council will therefore avoid future capital costs associated with maintenance of the property.

Revenue

The transfer of the property delivers revenue savings approved as part of the 2025/26 Council budget.

In accordance with the 2020 Community Asset Transfer Policy, a grant equivalent to 15% of the average 2 year running costs (excluding staffing) will be paid on completion of the transfer and a grant equivalent to 5% the following year. This will have a revenue implication of £8,826 in 2025/26 and £2,942 in 2026/27.

3.3 **Legal Implications**

Compliance with Subsidy Control Act 2022

The granting of a lease at an undervalue to the proposed tenant on the proposed terms could constitute a subsidy under the Subsidy Control Act 2022 as it may permit a certain degree of commercial usage. In order to comply with the legislative requirements relating to a subsidy, the Council will either apply the 7 subsidy control principles to justify the giving of the subsidy or will grant the subsidy under the Minimum Financial Assistance exemption and report on this to the BEIS Transparency Database.

Local Government Act 1972; Section 123: Disposal of Public Open Space and Common Land

The property includes a significant area of Public Open Space. In order to comply with the Act, the Council is obliged to publish the intention to dispose of this land. Any objections will need to be considered by Cabinet.

3.4 **Climate Change and Air Quality**

There will be no impact on Climate Change and Air Quality.

3.5 **Other (e.g. Risk, Integrated Impact Assessment or Human Resources)**

Government Grant Funding

As referenced above, Government grant funding was allocated for the building of the Property, as well as grant funding received from Sport England. Copies of these grant agreements have currently not been located but Officers are seeking these documents.

Officers have located an historic Cabinet report which advised that the sum of £634,000 was allocated to the Property from the Government grant funding and £650,000 was to be received from Sport England. However, as the terms of the grant agreements are not currently known, there is a risk that these figures were not the final sums received and that some of the grant funding may be repayable by a clawback within the agreements, but at this time Officers are unable to indicate the financial amount which may be required to be repaid, if any.

There is also the reputational risk to the Council if the disposal is in breach of the grant conditions, however it should be noted that the CIC along with other users of the centre and the local community have been assisting in the management of the Property since it was built and therefore this disposal may be consistent with the intention of the grant awards.

Integrated Impact Assessment (IIA)

The integrated impact assessment has been published on the Kirklees Council website and can be found on the following link: IIA - 722207363 .

4 Consultation

Parks and Open Spaces

The vesting service have been consulted throughout the process and have raised no objections to the transfer.

Highways and Streetscene, Corporate Landlord

The access road is unadopted and responsibility therefore vests with the landowner. Highways Registry and Corporate Landlord have been consulted and support the proposal to include the access road within the transfer.

Policy and Partnerships, Democracy, Public Health and Risk

Each individual asset transfer is developed and assessed in consultation with colleagues in the Community and Third Sector Teams, Legal Services, Finance, Risk and Audit and Corporate Landlord.

Ward Members

Dalton Ward members have been engaged throughout the process and are fully supportive of the proposed transfer.

5 Engagement

Applicant groups are required to undertake community engagement as part of the community asset transfer process with the findings incorporated in the business plan. The CIC have conducted community engagement reaching out to over four hundred members of the local community, the proposed uses of the asset set out in their application reflect the results of the engagement.

6 Options

6.1 Options Considered

a) Refuse the request for an asset transfer - refusal of the Asset Transfer could see the Property, and the services it would potentially deliver, lost to the local community.

For this reason officers are of the opinion that this is not the recommended option.

b) Transfer the site either freehold or leasehold – the Community Asset Transfer Policy 2020 allows for freehold transfers in exceptional circumstances. However, officers are of the opinion that this is not appropriate. Freehold transfer limits the Council's ability to remedy should there be a change in the organisation's circumstances or failure to fulfil its obligations.

Officers are of the opinion that the grant of a long leasehold for a period of 125 years is appropriate.

- The lease will include a covenant that restricts the use of the Property to community use with provision for an element of commercial use if this is considered necessary for a successful business model. Commercial use of the asset will normally be restricted to a maximum of 30%.

- It is proposed that the lease agreement be on the basis of a peppercorn rent for the full term, with the CIC being responsible for the full repair and insuring of the Property.

- The lease will reserve rights for the Council to use the Property for the purpose of an Electoral Polling Station.

- The grant of a long leasehold gives the CIC the security needed to satisfy grant funder requirements.

Officers recommend:

That Cabinet approve and delegate authority for the Service Director – Development, in consultation with Portfolio Holder - Finance and Regeneration, to negotiate and agree terms with Moldgreen ARLFC (DRAM Holdings) Community Interest Company for the grant of a 125 year lease for the DRAM Centre site and instruct the Service Director - Legal, Governance and Commissioning to enter into and execute all necessary documentation in connection with the grant of the lease.

6.2 **Reasons for recommended Option**

- The asset transfer of the Property supports the Council's ambitions of allowing local people and communities greater control over local assets and the services delivered from them.

- The grant of a long leasehold for a period of 125 years is in accordance with the Council's Community Asset Transfer Policy 2020.

- It will give the CIC the security needed to satisfy grant funder requirements whilst ensuring that the Property remains available to the local community for the long term.

- The grant of a long lease provides the Council with remedies including forfeiture in the event that there is a breach of the terms of the lease.

7 Next steps and timelines

Subject to Cabinet approval, the Service Director – Development in consultation with Portfolio Holder - Finance and Regeneration will negotiate and agree terms for the grant of a 125 year lease of the DRAM Centre, being the land and buildings shown edged red on Plan reference 24-0162, and instruct the Service Director - Legal, Governance and Commissioning to execute and enter into all necessary documentation in connection with the grant of a 125 year lease of the DRAM Centre, Ridgeway, Dalton, Huddersfield, HD5 9QJ to Moldgreen ARLFC (DRAM Holdings) Community Interest Company.

8 Contact officer

Mark Varley (Asset Strategy Officer)
mark.varley@kirklees.gov.uk

9 Background Papers and History of Decisions

Community Asset Transfer Policy 2020
Asset Review November 2023

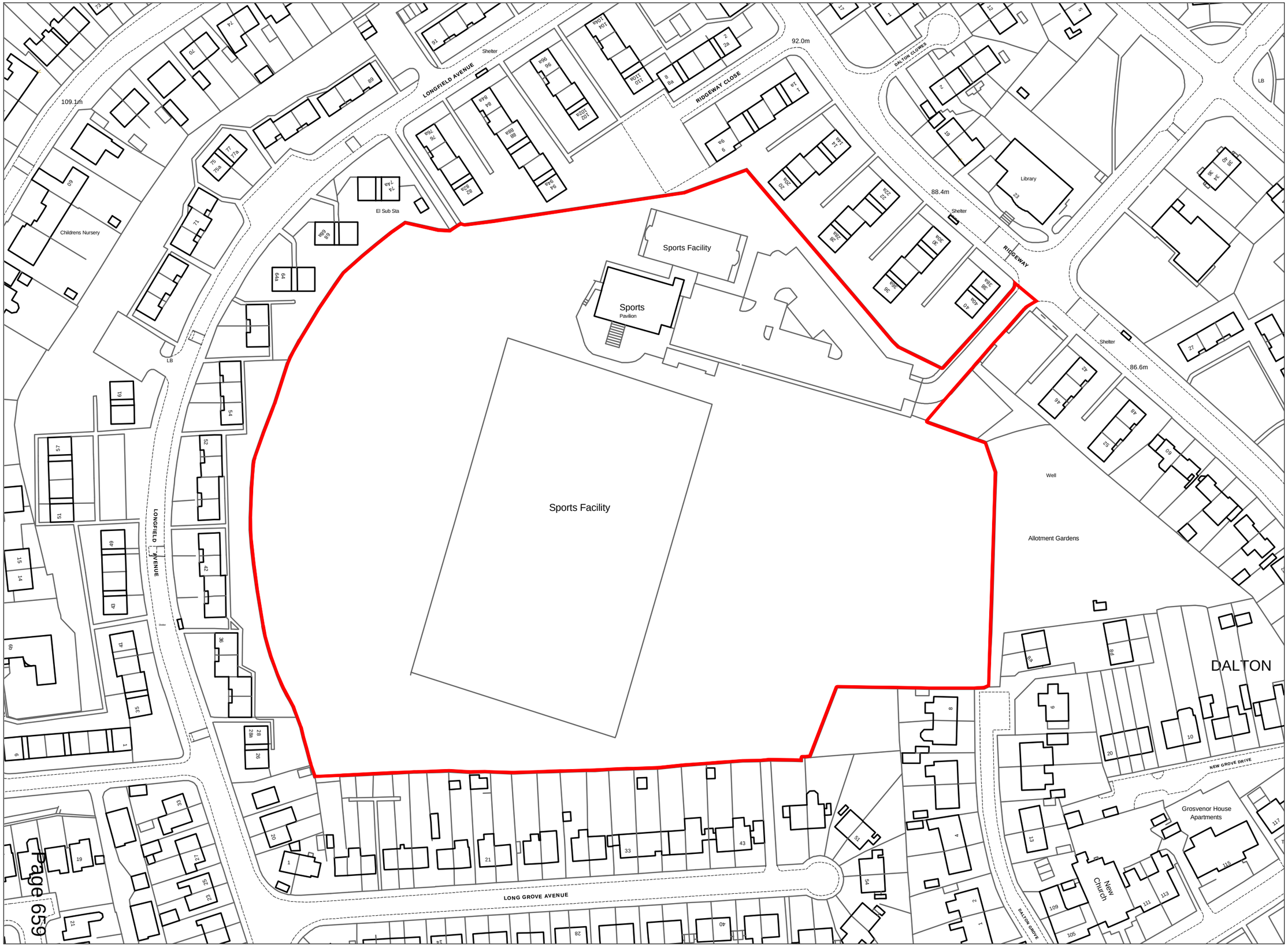
10 Appendices

Appendix A - Red Line Boundary plan (Ref. 24-0162)
Appendix B - Community Asset Transfer Policy 2020

11 Service Director responsible

Joanne Bartholomew

Plan No:24-0162



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Kirklees COUNCIL

Assets & Estates

Date:
09/08/2024

Scale:
1:1250 @ A3

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Community Asset Transfer Policy

September 2020

Introduction: our aspirations for communities and the role of asset transfers

Community Asset Transfer (CAT) is the transfer of ownership and management of public land and buildings from the Council to a community organisation. Assets are transferred at less than market value for local social, economic or environmental benefit.

The primary purpose of CATs in Kirklees is to invest in communities, and we will go the extra mile to help communities achieve their aspirations. This means:

- transfers are a way to empower communities;
- we will find ways to promote asset transfers in our place-based community engagement work as an option for communities to achieve their aspirations; and
- we will build and maintain a relationship with groups before, during, and after transfer to ensure that the asset continues to be available for the community.

As part of the vision for Kirklees to be a great place to live, work, and invest, the Council works with communities to build community capacity and realise community aspirations for their places. CATs are one way in which our communities can be enabled to realise these aspirations and deliver our shared outcomes. By unlocking the power of community, CATs help to build a more inclusive local economy and enable people to live in better health for longer.

Community-owned and community-run assets act as a catalyst for realising local aspirations by:

- improving local assets: community groups investing in and/or attracting investment for improving local assets;
- supporting local initiative: supporting and building on local community initiative and enthusiasm, which encourages community participation and volunteering; and
- building new connections: local citizens and groups developing new partnerships in their communities (including to support community cohesion).

We have delivered CATs since 2013. As of August 2020 there have been a total of 21 successful CATs across Kirklees.

Recognising the benefits they can deliver, we want to ensure that all our CATs are sustainable. We also want to be transparent with organisations interested in CATs. In line with these commitments, this policy sets out a robust process and offer that has been developed in accordance with the knowledge, skills, and experience we have gained since CATs were introduced in 2013.

This Policy sets out our framework for enabling and managing CATs, specifically:

- why we transfer assets;
- what assets will be considered for transfer;
- the eligibility criteria;
- the conditions of transfer; and
- how requests will be processed.

'We're Kirklees'

'We're Kirklees' is our name for the way local people, organisations, and places can work together to deliver our vision for Kirklees and our Seven Shared Outcomes, which are set out in our Council Plan (2020-21). 'We're Kirklees' means we're:

- **Working with people, not doing to them:** organisations working together with people and communities to enable them to solve problems and make the most of their strengths and opportunities;
- **Working with partners:** organisations sharing knowledge, skills, and resources to work smarter together; and
- **Place-based working:** recognising that each town, village, and community has its own unique strengths and opportunities that can help them solve problems locally, and working to support and enable these.

Eligibility and Conditions for Sustainable CATs

Eligible assets
The assets made available for Community Asset Transfer (CAT) will be at the discretion of the Council, but may include public service buildings and land, such as civic halls, community centres, heritage assets, libraries, open spaces, and parks. Assets which are still required strategically by the Council cannot be made available for transfer.

Assets might be identified as of potential community benefit by the Council or by communities themselves, and the Council encourages community discussions about local aspirations and how local assets might support those.

Eligible organisations
An organisation is eligible if their primary purpose is social, charitable, or community benefit, which can include:

- a charity;
- a community interest company;
- a cooperative(link);
- a social enterprise; or
- an unincorporated association (although would need to be incorporated to complete a transfer).

The Council may consider and prioritise expressions of interest for asset transfer to Town and Parish Councils, acknowledging the advantages of democratically elected governance and representation.

Expressions of interest are welcomed from any community organisation that meets the following criteria:

- their primary purpose must be for community benefit;
- they must be open to and demonstrate an inclusive approach to all members of the wider community;
- they must have the skills and capacity to effectively manage the asset and deliver services;
- they must be financially stable and able to demonstrate good governance by operating through transparent and accountable processes; and
- the proposals for the asset must be clear (so the group can demonstrate all of the above),

The Council will encourage collaboration between community organisations and the sharing of assets to optimise both social value and value for money across the District. Applications will not be considered where an asset transfer is likely to compete with and potentially compromise an existing community facility.

If two or more expressions of interest are received the Council will work with the interested parties to develop options and understand the best way forward for the asset. Where appropriate, parties may be encouraged to collaborate and submit a joint application. We will invite viable proposals to proceed to the full application stage.

Conditions of transfer

To ensure that the property transferred is retained by the community for community benefit (e.g. the purpose for which the CAT was approved), assets will be transferred by the grant of a long term leasehold rather than freehold. In exceptional circumstances the Council may consider the transfer of a freehold interest.

The lease will be agreed for a nominal annual rent. It will include legal provisions (covenants) to ensure that the asset is restricted to community use, and may include provisions to ensure it remains open to community use (with a minimum number of hours of community use as agreed between the parties).

In some cases, these provisions will allow some commercial use, when that supports the sustainability of the business model and thereby the community benefit. Cabinet will decide when commercial use is appropriate as part of the application process.

In the final agreement, the Council may reserve the right to use the asset where it is required to deliver a statutory function or strategic ambition, e.g. as a library or on occasions for a polling station during elections or emergency planning purposes.

Upon completion of the transfer, the organisation will be fully responsible for:

- upkeep, repair and maintenance of the asset;
- all running costs, including insurance; and
- compliance with statutory inspections, health and safety requirements, and other relevant legislation.

Following asset transfer, organisations are encouraged to allow other community groups to use the space in the asset (which might also generate income for the organisation). To ensure the asset is of maximum possible community benefit, the group controlling the asset should not discriminate between groups based on protected characteristics (e.g. sex, disability, race, sexual orientation, gender assignment, religion, etc.).

The CAT application process

1. Initiating a CAT application with an Expression of Interest
A CAT application must begin with an expression of interest from a community organisation.

Eligible organisations (see 'Eligible Organisations' above) can submit expressions of interest relating to any Council-owned asset they believe to be of potential community benefit and which is eligible as per this policy.

To submit an expression of interest an Eligible Organisation need not be managing or operating from the asset.

The Council may also advertise surplus assets inviting expressions of interest for asset transfer.

The Expression of Interest form can be found here:

- http://www.kirklees.gov.uk/beta/community-assets/community-asset-transfers.aspx

2. Assessment of an Expression of Interest
The Council will decide if both:

a) the asset in question is available for CAT; and
b) the group expressing interest is suitable and/or ready for CAT.

If a group is not ready for CAT, they will be signposted to additional support from the Council or other partners.

Council officers will aim to assess expressions of interest within four weeks of receiving them.

If the Council accepts an expression of interest, the applicant group will be invited to submit a full application (see below).

Acceptance of an expression of interest does not commit the applicant or the Council to the transfer of an asset.

3. Full Application
Applicants invited to submit a full application will receive support from the Council either directly or through external organisations commissioned by the Council. Applicants will also be encouraged to access support from other organisations.

The Full Application Form can be found here:

- http://www.kirklees.gov.uk/beta/community-assets/community-asset-transfers.aspx

The full application must include detailed information about the applicant group and a fully detailed and robust business case. Applicants invited to progress to this stage can apply to the Council for a grant of up to £5,000 to assist with professional or legal costs associated

with the development of the application. In large or more complex cases, applicants may be invited to apply to the Council for a grant of up to £10,000.

The following information must be included in all full applications:

- the legal structure of the applicant group;
- the experience and skills of the Board/Managing Group and their capacity to manage the asset;
- the proposed use of the asset and how this will support the Council's objectives and benefit the community;
- evidence that the local community has been consulted and the application reflects the needs identified in that consultation;
- budget/financial projections for the group and its use of the asset in question; and
- details of any condition works needed to the asset and the source and availability of capital grant funding.

Failure to provide the required information will lead to an application being delayed or rejected.

We will agree a timescale for submitting a full application with the applicant. Typically, we will expect an application to be submitted within six weeks, but we will agree a timescale that reflects the size and complexity of the asset, since applicants will likely require longer to compose applications for bigger and more complex assets.

Applications are assessed by council officers and partners in accordance with a scoring matrix, which is available online.

The following financial support is offered by the Council:

i. Development Grant

Applicants invited to progress to full application stage can apply to the Council for a grant of up to £5,000 to assist with professional or legal costs associated with the development of the application. In larger, more complex cases, applicants may be invited to apply to the Council for a grant of up to £10,000.

ii. Support towards capital works

Where assets require urgent condition works or physical adaptations to improve accessibility, applicants can apply to the Council for a grant. Any request for grant funding must be made at the Full Application stage and set out clearly within the applicant's business plan. The grant application will be considered by the Council's Cabinet in conjunction with the CAT application. Examples of urgent condition works/accessibility works could include boiler replacement, roofing works, window replacement, ramps, steps, and accessible toilets.

The Council will continue to consider requests for loans to match fund external grants or financing (which may include a groups cash reserves) for the development of assets.

Applications can be made at the Full Application stage and also following completion of a transfer. Applications must be supported by a full business plan evidencing the applicant's ability to repay the loan over the agreed term.

Other information on external sources of funding is available on request.

iii. Revenue grant

The Council will pay a two stage revenue grant to each successful applicant following completion of the transfer. The grant will be calculated based on the previous operational running costs (excluding staffing) for the asset.

A grant equivalent to 15% of the average running cost will be paid on completion of the transfer and a further grant equivalent to 5% the following year.

4. Cabinet Approval

If the application is satisfactory, officers will then seek the approval and authority of the Council's Cabinet (link) for the Council to carry out the asset transfer.

5. Finalising the terms of the asset transfer

Following Cabinet approval, Council officers will work with the applicant to draw up heads of terms for all the documents that form part of the asset transfer. These documents will comprise of some or all of the following:

(a) Lease (or in exceptional circumstances a freehold transfer deed);
(b) Polling station agreement;
(c) Emergency planning agreement;
(d) Grant Agreement; and/or
(e) Loan Agreement

When heads of terms have been agreed, the Council's legal department will draw up all the required documents, and then negotiate and agree the terms of the documents with the applicant's solicitors.

6. Completion

When the documents are in an agreed form, they can then be completed, and the asset transfer will then come into effect.

Indicative Timescales

The full process can take 10-12 months.

Stage	Who is responsible	Indicative Timescale
1. Initiating a CAT application with an Expression of Interest (EOI)	Applicant	N/A (initiates CAT application)
2. Assessment of an Expression of Interest	Council Officers	4 weeks
3a. Full Application & Business Case (Composition)	Applicant	6-12 weeks (a longer period may be agreed dependent on the size and complexity of the asset)
3b. Full Application & Business Case (Assessment)	Council Officers	4 weeks
4. Cabinet Approval	Council Officers Cabinet	6 – 10 weeks
5. Finalising the terms of the Asset Transfer	Council Officers	6 – 8 weeks
6. Completion	Council Officers Applicant	12 weeks

All timescales are only indicative. It is acknowledged that CATs may be delayed for a number of reasons, including:

- complexity and size of the asset being transferred;
- further research required to support the application;
- legal processes involved;
- capacity and availability of people; and/or
- Council Service Reviews.

Changes from the previous policy

This policy supersedes our 2017 Community Asset Transfer Policy. The key changes since then are summarised below.

The change	Our old policy	Our new policy	Why was this change made?
All transfers are with long leaseholds by default	The Council used to transfer buildings differently to land, with buildings transferred freehold and land on long leaseholds.	Our default presumption is now to transfer all assets (land and buildings) on a long leasehold. Freehold transfers will be considered in exceptional circumstances and will be at the discretion of the Council.	Long leaseholds ensure that the asset remains available to the community by providing the Council with remedies in the event that the applicant does not fulfil their obligations with respect to the management of the asset or there is a breach of the terms of the lease. The grant of long leaseholds still gives applicants the security needed to satisfy grant funders.
More financial support for applicants invited to the Full Application stage	We used to offer a grant of up to £5,000 to cover legal costs and fees associated with the application.	In exceptional cases the Council will now offer up to £10,000.	Some cases require extra support because of their size and complexity.
More financial support for successful applicants	We used to offer a grant in the first year after a transfer equivalent to 15% of the asset's running cost (excluding staffing costs).	We now offer a grant in the first and second year after a transfer. The first year grant remains at 15%. The second year grant is 5%.	This will provide extra post-transfer support that will assist with the running of the transferred asset and increase the likelihood of sustainable asset transfer.

	We used to offer applicants a loan option for up to £100,000 match funding towards capital improvements to the asset. Loan applications had to be submitted at the full application stage of the process. Applications would not be considered post transfer.	The Council will now offer an option of grant funding and loans. Groups will be able to apply for a grant to fund urgent condition works or physical adaptations to improve accessibility. Examples of these works may include boiler replacement, roofing works, window replacement, ramps, steps, and accessible toilets. The Council will now consider requests for loans to match fund external grants and financing, prior to and following completion of the asset transfer, for groups wanting to develop assets.	The introduction of a grant will further support the viability of community asset transfers, allowing groups to invest in urgent condition/accessibility works where needed to bring assets back into use. Post transfer loans will provide added flexibility to groups intending to carry out capital improvements to assets, ensuring that they remain available for public use and sustainable in the long term.

More proactive strategic approach to CATs	We used to transfer assets primarily when they were surplus to our service requirements. Assets were also sold to raise funds for important Council services.	We will now also encourage community groups in our community engagement to proactively identify assets they need to solve local issues and to achieve community aspirations. Where asset transfers aren't possible, groups will be signposted to support within or external to the council to ensure that we build on their aspirations for their communities.	As set out in the Corporate Plan (link), we're now working more with people and doing less to or for them, working more in place-based ways led by local community aspirations and valuing the diversity of perspective and identities that make up local places. This requires that we proactively encourage community organisations to think about the assets they need to achieve these aspirations.

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