Public Document Pack

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Monday 16 March 2026

Notice of Meeting

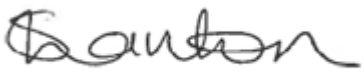
Dear Member

Cabinet

The **Cabinet** will meet in the **Council Chamber - Town Hall, Huddersfield** at **1.30 pm** on **Tuesday 24 March 2026.**

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.

The Cabinet members are:-

Member	Responsible For:
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 apologies for absence from Cabinet Members who are unable to attend this meeting.

2: Minutes of Previous Meeting

1 - 10

To approve the Minutes of the Meeting of the Cabinet held on 10 February 2026.

3: Declaration of Interests

11 - 12

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

4: Admission of the Public

Most agenda items take place in public. This only changes where there is a need to consider exempt information, as contained at Schedule 12A of the Local Government Act 1972. You will be informed at this point which items are to be recommended for exclusion and to be resolved by the Committee.

5: Deputations/Petitions

The 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 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.

7: Bi-Annual Homes and Neighbourhoods Service Wide Report

13 - 24

To receive the Bi-Annual Homes and Neighbourhoods Service Wide Report.

Wards affected: all

Contact: Phil Jones, Service Director Homes and Neighbourhoods

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8: Cooper Bridge delegation of executive functions from Calderdale Council to Kirklees Council

25 - 58

To consider the acceptance of executive functions to support the ongoing development and delivery of the Cooper Bridge improvement scheme.

Wards affected: Liversedge and Gomersal, Mirfield and Ashbrow.

Contact: Ilyas Ramjan, Head of Major Projects

9: Development of land at Gasworks Street - West Yorkshire Investment Zone

59 - 106

To consider the development of land at Gasworks Street.

Ward affected: Dalton

Contact: Chris Duffill, Head of Business and Skills

10: Our Cultural Heart - Phase 1 Food Hall

107 - 206

To consider Our Cultural Heart, Phase 1 Food Hall.

Ward affected: Newsome

Contact: David Glover, Senior Responsible Officer - Our Cultural Heart

Exempt information is detailed in the appendices to the attached 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 consideration of the following item of business, on the grounds that they involve the likely disclosure of exempt information, as defined in Part 1 of Schedule 12A of the Act

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11: 2026/27 Proposed allocation of funding from the Children and Families Directorate, Learning and Early Support Schools Capital Maintenance baseline section of the Capital Plan.

207 - 222

To consider capital projects from the 2026/27 Learning and Early Support Capital Maintenance baseline section of the Capital Plan.

Wards affected: all

Contact: David Martin, Head of Service for Property

12: White Rose Forest -Trees for Climate Programme 2026-2030

223 - 242

To consider a new funding agreement for the delivery of the Trees for Climate programme.

Wards affected: all

Contact: Iwan Downey, White Rose Forest Programme Director

13: Kirklees Local Plan Update: Commencement and Delivery Arrangements

243 - 258

To consider the new regulations to commence the Kirklees Local Plan.

Wards affected: all

Contact: Jo Scrutton, Group Leader Policy and Strategy

14: Corporate Financial Monitoring Report Quarter 3 for 2025 - 2026

259 - 360

To consider the Corporate Financial Monitoring Report for 2025-2026.

Wards affected: all

Contact: James Anderson, Head of Accountancy

15: Q3 2025/26 Council Plan and Performance Update Report

361 - 434

To receive the Q3 2025/26 Council Plan and Performance Update Report.

Wards affected: all

Contact: Andy Simcox, Service Director for Strategy and Innovation

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16: Corporate Risk Report, Quarter 3 2025 - 2026

435 - 466

To receive the Corporate Risk Report, Quarter 3 2025-2026.

Wards affected: all

Contact: Martin Dearnley, Head of Audit & Risk

Contact Officer: Andrea Woodside

KIRKLEES COUNCIL

CABINET

Tuesday 10th February 2026

Present: Councillor Carole Pattison (Chair)
Councillor Beverley Addy
Councillor Moses Crook
Councillor Nosheen Dad
Councillor Tyler Hawkins
Councillor Viv Kendrick
Councillor Amanda Pinnock
Councillor Jane Rylah
Councillor Graham Turner

Observers: Councillor Tanisha Bramwell
Councillor Andrew Cooper
Councillor Jo Lawson
Councillor Susan Lee Richards
Councillor Mohan Sokhal

92 Membership of Cabinet
No apologies for absence were received.

93 Minutes of Previous Meeting
RESOLVED – That the Minutes of the Meeting held on 13 January 2026 be approved as a correct record.

94 Declaration of Interests
No interests were declared.

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

96 Deputations/Petitions
No deputations or petitions were received.

97 Questions by Members of the Public
Under the provision of Council Procedure Rule 11, Cabinet received the following questions:

Question from Sara Blagborough
"In the report prepared for Cabinet on the 10th December 2024 it was stated in 2.10-2.11 that best and final offers will be sought from [these] suppliers and will be evaluated in accordance with pre-determined quality and financial criteria. Evaluation will weight quality greater than price and be subject to minimum quality

criteria as part of the design of the best and final offer stage and that the quality criteria will take account of bidders' experience of managing care homes and assess their ability to continue to deliver high quality care services for people with dementia in the future. With this in mind can you explain the rationale for continuing a transfer to the Mulberry Care Home Group given the recent (October 2025) CQC rating received for White Rose House which has been awarded 'requires improvement' in all areas which include safe, effective, caring, responsive, well-led'?

A response was provided by the Cabinet Member for Adult Social Care (Councillor Dad).

Question from Sara Blagborough
"In the October 2025 CQC inspection report for White Rose House under safeguarding it states 'The provider did not always work well with people and healthcare partners to understand what being safe meant to them and how to achieve that. They did not always concentrate on improving people's lives or protecting their right to live in safety, free from bullying, harassment, abuse, discrimination, avoidable harm and neglect. The provider did not always share concerns quickly and appropriately.' Armed with this information how can you possibly justify continuing with Mulberry as the preferred provider for Castle Grange and Claremont House?"

A response was provided by the Cabinet Member for Adult Social Care (Councillor Dad).

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

Question from Councillor Cooper

"On behalf of Netherton Community Group. Little or no progress has been made in extending the Meltham Greenway to Netherton. This is despite the fact that Kirklees already have plans, surveys and a large number portion of the funds needed already in place. The existing greenway is very well used by local residents and is sure to attract more walkers, cyclists and tourists, generating more footfall and income for local businesses. The extension plans have been on the backburner for well over a decade and recently a small group of volunteers have been working behind the scenes to make this extension a reality. Has the Council got a timetable for sorting out this section of greenway?"

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

Question from Councillor J D Lawson

"In October 2025 I raised a longstanding concern regarding land on the corner of Springdale Avenue and Bulay Road, asking for assistance in clearing it of flytipping and was pleased to see that some attempt was made in the days after but it remained overgrown. In December I asked when it would be completed and I was

told in the next few days so I expected to see cleared land. The residents don't want it to see this overgrown land. When will it finally be cleared?"

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

Question from Councillor Bramwell

"A couple of months ago at Cabinet I raised concerns about safety in Dewsbury, which Councillor Turner responded to. Since then we have had two fatalities and homicide investigations, stabbings in the town centre, traders leaving the market because they feel unsafe and the mayoral chains stolen form the town centre. Will the Cabinet Member reconsider his comments and admit that not only Dewsbury, but the surrounding communities in Dewsbury, are unsafe?"

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

Question from Councillor Cooper

"In regard to the response to Sara Blagborough, will the CQC inspection cause for a time of reflection over whether we are doing the right thing in transferring care homes to someone who is not a quality provider?"
A response was provided by the Cabinet Member for Adult Social Care and Corporate (Councillor Dad).

Question from Councillor J D Lawson

"The campaign were promised that there would be top quality care, but we are now seeing that one of the homes that Mulberry Care manages requires improvement, and we've seen the report on safeguarding. To reiterate Councillor Cooper, there is a need for reflection on what we are potentially transferring care to?"

A response was provided by the Cabinet Member for Adult Social Care and Corporate (Councillor Dad).

99 Our Council Plan 2026-2029 (Reference to Council)
(Under the provision of Council Procedure Rule 36(1), Cabinet received a representation from Councillor Cooper).

Cabinet received the 2026/2027 – 2028/2029 Council Plan, prior to its submission to the meeting of Council on 11 March 2026.

The report advised that the Plan builds upon the current 2025/2026 Council Plan and integrates feedback from the Local Government Association and the Overview and Scrutiny Management Committee. It retains long-term cross-directorate principles, shared outcomes, and partnership strategies, which will be further developed into a revised Partnership Framework in collaboration with strategic partners during 2026. It was noted that the Council Plan outlined the overarching ambitions, strategic direction, priorities, and goals for the Council over the next three years and had been developed alongside the budget, providing a strategic

framework for resource allocation to achieve these priorities. It also incorporated the Council's People Strategy and the 'Our Council' initiative, which aim to strengthen organisational culture through seven key principles, including collaboration, inclusivity, and accountability.

It was noted that progress on the aims and activities as set out in the Plan would be monitored through quarterly reporting to the Cabinet, ensuring the plan remains current and reflective of ongoing developments.

Cabinet agreed that the Council Plan be submitted to Council with a recommendation of approval. It was noted that, if adopted, the plan would replace the current version to guide the prioritisation of activities and the delivery of services to achieve the Council's vision of a thriving, sustainable, and inclusive district.

RESOLVED –

1) That the Council Plan 2026-2029, as presented at Appendix 1 of this report, be received and noted.

2) That the feedback provided by the Overview and Scrutiny Management Committee, as provided in section 5 of the report, be noted.

3) That the report be submitted to the Meeting of Council on 25 February 2026 with a recommendation of approval.

100 Council Annual Budget Report 2026-2027 and following years, incorporating Capital, Treasury Management, General Fund, Revenue and Housing Revenue Account (Reference to Council)

(The report gave notice to Cabinet Members of the requirements of Section 106 of the Local Government and Finance Act 1992 in relation to voting and participation in the meeting).

Cabinet gave consideration to the Council Budget Report 2026/2027 and 2027/2028 and future years, incorporating General Fund Revenue, Treasury Management, Capital, and Housing Revenue Account prior to its submission to Council on 25 February 2026.

The report provided a summary of the updated balanced budget position for 2026/2027, with movements from the 2025/2026 base budget along with information on (i) the financial strategy (ii) the 2026/2027 budget (iii) the provisional local government financial settlement and (iv) budget priorities.

The report set out an overview of spending plans in each Directorate and provided information in regard to (i) central budgets (ii) treasury management (iii) flexible capital receipts (iv) budget savings (v) monitoring and challenge (vi) reserves (vii) schools funding – dedicated schools grant (viii) housing revenue account and (ix) capital.

Having considered the content of the report and the accompanying appendices, Cabinet agreed that the proposed budget be submitted to the meeting of Council on 25 February 2026 for determination.

RESOLVED –

1) That the feedback from the Meeting of Overview and Scrutiny Management Committee held on 16 January 2026, as summarised at paragraph 5 of this report, in reaching decisions regarding the final budget recommendations for 2026/27 within this report, be noted.

2) That the feedback from the Budget Consultation at paragraph 4 of this report and Appendix L be noted.

3) That the Budget Motion be submitted to the Meeting of Council on 25 February 2025 with a recommendation that;

(i) General Fund Revenue

- the Revenue Budget for 2026/27 to deliver a balanced position, as attached at Appendix A, be approved.
- the forecast spending and funding plans for the 2026/2027 and 2027/2028 period, as as set out at Appendix A, be noted.
- the forecast levels of statutory and other Council reserves as set out at Appendix C be noted.
- the strategy for the use of balances and reserves (paragraph 2.17 refers) be approved.
- the Council's flexible capital receipts policy for 2026/2027 (paragraph 2.14 and Appendix G refer) be approved.
- the Council Tax requirement for 2026/2027, as set out at Appendix M, be approved.
- the Council's Statutory s151 Officer's positive assurance statement as to the robustness of the forecasts and estimates and adequacy of financial reserves, as set out at paragraph 2.22, be noted.
- authority be delegated to the Council's Statutory s151 Officer to amend how the finally approved precepts are recorded in the Council's revenue budget in line with the final notifications received following decisions by the West Yorkshire Mayor Police and Crime Commissioner, the Fire & Rescue Authority and Parish Councils should these be received after 25 February 2026 (paragraph 3.1.3 refers).

(ii) Treasury Management

- the borrowing strategy be approved (paragraphs 2.15 to 2.27 refer).
- the investment strategy be approved (paragraphs 2.28 to 2.36 and Appendices A and B refer).
- the policy for provision of repayment of debt (minimum revenue provision) be approved (paragraphs 2.37 to 2.38, Appendix C refer).
- the treasury management prudential indicators be approved (Appendix D refers).
- the Investment Strategy (non-treasury investments) be approved (Appendix F refers).

(iii) Capital

- the updated Capital Plan for 2025-2033 be approved (Appendix F refers).
- the Capital Strategy (including Prudential Indicators) be approved (Appendix I refers).

(iv) Housing Revenue Account

- the HRA Budget for 2026/2027 be approved (Appendix K refers).
- the strategy for the use of HRA reserves (Appendix K refers) be approved.

101 Kirklees' School Funding Arrangements for the Financial Year 2026/2027

Cabinet gave consideration to a report which set out the Kirklees' School Funding Arrangements for Financial Year 2026/2027.

The report outlined the funding arrangements for Kirklees Council's Dedicated Schools Grant (DSG) for the 2026/2027 financial year, including allocations across the four funding blocks, Schools block, High Needs block, Early Years block and Central Schools and Services block (CSSB). It explained that the schools block per pupil funding rates had increased to £5,849 from £5,548 (2025/2026) for primary and £7,560 from £7,201 (2025/2026 for secondary, and that the Kirklees' schools block allocation has increased to £412.07 million.

Cabinet noted that the Schools Forum had approved a transfer (disapplication) of £3.6 million to the High Needs block which would continue to support SEND transformation initiatives and that the High Needs block for Kirklees had been allocated £75.1 million for 2026/2027. The report advised that a £3.6 million transfer from the Schools Block would help support a range of investment measures as part of the broader Kirklees SEND transformation plan and align with Kirklees' ongoing Safety Valve intervention programme.

The report advised that (i) the Early Years block has received an allocation for 2026/2027 of £80.3 million (ii) Local consultation on the Early Years Funding Formula and the SEND Inclusion Fund (SENDIF) had taken place between 19 December 2025 and 25 January 2026 (iii) the Central School Services Block (CSSB) for Kirklees had been allocated £57.51 per pupil (up from £43.38 in 2025/2026), totalling £3.7 million and that this increase was due to the inclusion of two grants for Centrally Employed Teachers and Staff, which were received as a separate grant in 2025/26 over and above the DSG allocation and (iv) the increased funding across the DSG between financial year 2025/2026 and 2026/2027 was distorted due to the rolling together of grants in the Schools Block and Central School Services Block, which had previously been separate, and that the High Needs Block, continues to bring challenge.

It was noted that, based upon the DfE funding timeline, it was expected that the Local Authority would inform maintained schools of their 2026/2027 budget shares by 28th February 2026, and that the DfE would inform academies of their budget allocations for the academic year 2026/2027 by the 31st March 2026.

RESOLVED –

1) That approval be given to the proposed local formula factors for the distribution of Dedicated Schools Grant (DSG), Schools Block funding for 2026/2027, as set out in Appendix A.
2) That the decisions made by Schools Forum in terms of central budgets, delegated budgets and a fund for significant growth for 2026/27, as detailed in the report and the accompanying appendices, be noted.
3) That approval be given to the submission of the schools' local funding formula to the Department for Education (DfE) for 2026/2027.
4) That the disapplication request made to the DfE, which has now been agreed, be noted.
5) That the DfE exceptions application be noted.
6) That authority be delegated to the Executive Director (Children's Services), in consultation with the Cabinet Member for Children's Services and Cabinet Member for Education, to take account of the outcomes of the provider consultation, the views of the Early Years and Childcare Reference Group and Schools Forum and make a final decision on the Early Years local funding formula 2026/27 and the value of the Special Education Needs and Disability Inclusion Fund.

102 Consideration to Establish an Alternative Provision Free School

Cabinet gave consideration to a report which explained that an application had been made to the DfE in 2022 to establish an Alternative Provision Free School in partnership with a Multi Academy Trust in order to deliver specialist alternative provision for pupils who cannot attend mainstream or special schools and provide full-time suitable education for excluded pupils or those unable to access school for behavioural, medical, or other reasons and must meet strict quality, safeguarding, and partnership requirements set by the government. The report advised that the application had been successful and set out two options that the DfE have made available to the Local Authority in relation to securing government funded Alternative Provision, which Cabinet were asked to consider.

Paragraph 2 of the report explained that the two options presented were (i) to progress with the establishment of a 125 place Alternative Provision Free School (serving Key Stages 2 - 4) with the appointed Multi Academy Trust or (ii) accept a total capital allocation of £5,875,000 (paid over 3 financial years), as an alternative to enable the Council to secure the places that are needed locally using a different approach.

Cabinet noted the recommended option to establish the Free School in order to secure high quality sufficient places, now and to meet longer term need from a state funded provider. It was noted that, following the decision, the timeline for progress would be determined in conjunction with the Department for Education and the Multi Academy Trust.

RESOLVED –

That approval be given to (i) confirm with the Department for Education that Kirklees should progress with the establishment of a 125 place Alternative Provision Free

School and (ii) delegate authority to the Executive Director (Children and Families) and the Cabinet Member for Education to work with the Department for Education and the appointed Multi Academy Trust, Delta, to take forward the project.

103 CQC's Inspection Report and Rating for Adult Social Care

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

Cabinet received a report which an update on the CQC's Inspection Report and Rating for Adult Social Care.

The report advised that the Care Quality Commission (CQC) had carried out an inspection of Adult Social Care services with an onsite visit over 3 days from 26th May 2025. It explained that the inspection was undertaken in accordance with the new local authority assurance framework, which examines how Local Authorities meet their Care Act duties across the four key themes of leadership, working with people, providing support and ensuring safety.

Cabinet were informed that the overall outcome of the inspection was that Kirklees Adult Social Care Services 'requires improvement' with a score of 59, falling just short of a 'good' rating which would have required a minimum score of 63. This provided information on the areas of strengths, along with areas for development and how this will be addressed. It was noted that most of the areas for improvement were already being actioned through a multi-year Change Programme focused on redesigning pathways, integrating services, considering the market/commissioning needs and investing in digital and community-based solutions.

RESOLVED –

1) That the content of the CQC published report: Local authority assessment reports - Care Quality Commission be noted.
2) That the content of the report, along with the accompanying draft improvement plan as set out at Appendix 1, be noted.
3) That Cabinet be updated on the progression of the improvement plan to achieve the required improvements.

104 Homes and Neighbourhoods Annual Report 2024/2025

Cabinet received the Annual Housing Report for the Homes and Neighbourhoods service for the 2024/2025 year. The report summarised service activity, performance, and tenant satisfaction for the 2024/2025 financial year and provided an overview of compliance with regulatory requirements.

Cabinet were advised that the report set out service activity and performance for the reporting year and included tenant satisfaction measure data and narrative aligned to the Regulator of Social Housing Consumer Standards which included safety and quality, neighbourhood and community, tenancy, and transparency, influence and accountability. The report also referenced delivery against commitments in the 2023/2024 Annual Housing Report and identified areas of focus for the 2025/2026 reporting period.

The report advised that 2025/2026 Annual Housing Report was scheduled for publication in June 2026, aligned with the national release of Tenant Satisfaction Measures.

RESOLVED - That the content of the Annual Housing Report 2024–2025 be noted.

105 Local Transport Plan Approval

Cabinet received a report which sought approval for the Combined Authority (WYCA) Local Transport Plan (LTP4) in advance of the Combined Authority meeting on 19th March 2026 which will consider its formal adoption. The report advised that the LTP4 would be the new statutory Local Transport Plan for West Yorkshire.

The report explained that the WYCA Local Transport Plan (LTP4) set out the statutory framework for delivering a safe, integrated, reliable, and sustainable transport system across West Yorkshire, replacing the previous West Yorkshire Transport Strategy 2040 and reflecting major changes since 2017.

Cabinet were advised that approving LTP4 would ensure that Kirklees' transport priorities were fully aligned with regional objectives and statutory requirements, and provide a clear mandate for partnership working with the West Yorkshire Combined Authority (WYCA) and neighbouring districts, enabling integrated delivery of schemes that support economic growth, social inclusion, and climate action. It was noted that LTP4 underpinned a £2.1 billion Single Settlement for transport investment across West Yorkshire and would strengthen Kirklees' position as a key delivery partner, securing access to future funding for projects that align with the Council's recently adopted Transport Strategy.

It was noted that, pursuant to the detail of the published report, this matter and future Local Transport Plans, would not require submission to Council for final endorsement, and that the determination of the matter would be taken by Cabinet.

RESOLVED –

1) That the contents of this report, and the LTP4 document (Appendix A) and LTP4 Consultation report (Appendix B) be noted.
2) That approval be given to LTP4, to support adoption by West Yorkshire Combined Authority.

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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.

Kirklees COUNCIL

REPORT TITLE: BI-ANNUAL H&N SERVICE WIDE REPORT

Meeting	Cabinet Meeting
Date	24th March 2026
Cabinet Member	Cllr Moses Crook Deputy Leader and Transport and Housing
Key Decision **Eligible for Call In**	No No – Update report with no decision requirement

Purpose of Report

This report provides Cabinet with a scheduled update on the performance, progress, and key challenges across the Homes and Neighbourhoods Directorate. The report enables Cabinet to discharge responsibility as the ultimate accountable body for the service.

It outlines improvements in service delivery, compliance, tenant engagement, repairs, and neighbourhood management, and highlights areas where further action is required. The report also updates members on regulatory position, investment activity, and ongoing transformation work, enabling informed oversight and assurance regarding the safety, quality, and sustainability of Council housing services.

Recommendations

Note the content of the report, and the progress made.

Reasons for Recommendations

The scheduled report is provided for Cabinet on the progress being made within the service enabling discharge of their governance responsibility as the ultimate accountable body with the Regulator of Social Housing.

Resource Implications:

Delivering compliance, investment, neighbourhood, data, and IT improvement programmes requires significant ongoing officer capacity, placing sustained pressure on technical, operational, and managerial resources across the service. These resources are planned with cost included in budget proposals.

Date signed off by <u>Executive Director</u> & name	25 February 2026 – David Shepherd
Is it also signed off by the Service Director for Finance?	10 March 2026 – Kevin Mulvaney
Is it also signed off by the Service Director for Legal Governance and Commissioning (Monitoring Officer)?	12 March 2026 – Samantha Lawton

Electoral wards affected: All wards

Ward councillors consulted: No.

Public or private: Public

Has GDPR been considered? Yes

1.0 Executive Summary

1.1 This report provides a performance update with regards to the Homes and Neighbourhoods. The report demonstrates a stabilisation and improvement; the directorate continues to improve across all major areas of operation. The report identifies some areas of continuing challenge, and seeks to highlight areas of performance, tenant engagement, and improving leadership capacity.

1.2 Within the Asset Management & Building Safety service we are making good progress with the establishment of new leadership arrangements and technical staff coming into post. This provides stability and is a key factor in improving performance, particularly in compliance areas. The service has launched a full stock condition survey and crucially has an approved plan in place for a £390m capital investment plan that will enable us to respond to decency issues arising from stock condition reports. The service is also accelerating the fire safety works programme to deliver the required actions as quickly as possible, whilst providing required mitigations to ensure the safety of tenants is maintained.

1.3 Governance and Assurance continue to work hard to improve tenant engagement and communication. In the period we have launched an improved tenant newsletter, undertaken a refresh of our website, and strengthened the network of opportunities for tenants to get involved. The service has also led on our approach to service improvement via the quality assurance framework, leading on embedding this new structured way of working responding the requirements placed on the service by our tenants, stakeholders and Regulators.

1.4 The Housing Management & Partnerships service has been focused on delivering improvements that make a difference to tenant's experience of the service. In July the service implemented the revised tenancy agreement leading to a clearer relationship between the service and tenants, and crucially enabling the work required on service charges to commence. The service has also seen a transition to a neighbourhood led housing model with officers working with local communities and partners to establish plans that demonstrate the impact we make and commitment we have to our areas. We have strengthened our approach to antisocial behaviour and put in place resources that will enable us to continue to develop around this important area of work. The service continues to look for areas of improvement, notably communal areas, that will allow us to continue to progress a tenant focused approach.

1.5 Repairs & Maintenance continues to demonstrate strong, improving operational performance with regards to emergency and routine responsive repairs. The improvements are compounded by improvement generally in tenant satisfaction reported via the Tenant Satisfaction Measures (TSM) data. Operationally, the service has delivered excellent results around the damp, mould and condensation work sustaining us at a business-as-usual position. The service has also progressed the management of the void turnaround project with signs of improvement showing there.

1.6 Across the directorate we are seeing improvements in our TSMs, averaging an 8% increase in scores. Our strongest performance was in overall service satisfaction and communication with tenants. Are areas for improvement sit in complaints handling, antisocial behaviour, and improving standards in communal areas. The insights from TSMs are used to inform service improvement plan.

1.7 Overall, our Regulatory position is improving because of the work done within services and the impact felt by our tenants. We anticipate scrutiny coming from the Regulatory Notice concluding over the next period, this will be tied closely to our action around fire safety. We also note the impact of quality assurance and regulatory readiness work will have on our ability to respond to inspection which we anticipate will occur in the summer months.

2.0 Information required to take a decision

2.1 Regulatory position

2.1.1 Regulatory notice

2.1.1.1 The service has been under Regulatory Notice since March 2024 due to a backlog of damp, mould, condensation cases, fire safety, and flagged water safety concerns. In the past six months, with Regulator support, the service has reached several key milestones.

2.1.1.2 We have assured the Regulator that damp, mould, and condensation (DMC) hazards are under control. Since August 2025, we have kept cases below 480 and sustained this level through winter. In September 2025, we completed a thorough stock survey, with 99.7% of properties checked physically and the rest reviewed remotely. Through our regular engagement with the Regulator we confirmed our approach, with agreement reached by the Regulator of Social Housing.

2.1.1.3 With regards to fire safety, we completed a full three-year FRA programme (837 properties) in under 12 months in November 2026. This resulted in 9,813 fire actions, of which 6,607 (67.33%) have been completed. As of January 2026, 3,206 actions remain outstanding, with 1,126 overdue past their delivery dates.

2.1.1.4 As of January 2026, the fire safety works programme was projected to take five years. Our ambition is to accelerate delivery and improve home safety sooner, it is our ambition to have reduced this, formally, to a two-year programme by 31st March 2026. Each mid-rise block (11–18 meters) has a tailored risk mitigation plan, developed after assessment. These plans, plus a schedule of block visits supported by West Yorkshire Fire and Rescue, will be published on our website in February 2026.

2.1.2 Consumer standards compliance

2.1.2.1 Homes and Neighbourhoods colleagues have focused on confirming compliance, developing our narrative and auditability for Consumer Standards through Quality Assurance. The assurance approach began in September, with a further review in December 2025. The results were reported to the Growth and Regeneration Scrutiny Panel and Housing Portfolio Holder Briefings in March 2026.

2.1.2.2 The Regulator of Social Housing grades providers from C1 (fully compliant) to C4 (significant issues). A summary of our assessment against standards;

- Transparency, Influence, and Accountability Standard - we believe we are operating at C2 level.
- Neighbourhood and Community Standard - we believe we are operating at C2 level.
- Tenancy Standard - we believe we are operating at C2 level.

- Safety and Quality Standard – we believe we are operating at C3 level.

2.1.2.3 As part of our active work we have identified several areas of focus that we will work on over the next 6 months to further strengthen our regulatory compliance position, these include;

- Establish the accelerated plan to deliver the fire safety works.
- Enhance stock data to better understand home investment needs.
- Enhance tenant data quality and use insights from the dataset to improve services.
- Expand tenant engagement to support increased participation and diversity of views.
- Continue improving our complaints handling approach, including enhancing tenant involvement in complaint assessments.
- Integrate Neighbourhood Plans emphasising the value of our ASB team's work.
- Implement a staff development programme to meet Conduct and Competency Standards and enhance professionalism.

2.1.2.4 Within the service we have a wide-reaching service improvement plan driven from our Quality Assurance Framework.

2.1.3 Rent standard

2.1.3.1 Presently, we are undertaking a major review of our compliance with the Rent Standard. The Government announced in January 2026 that from April 2026 a new Rent Standard would be brought into force brining guidance up to date and giving clear instruction on the rent convergence decision.

2.1.3.2 A separate report will be prepared and provided in respect of our compliance with Rent Standard. This will provide our internal and external assessment of compliance and assurance statements with regards to any further action required.

2.1.4 Tenant Satisfaction Measures

2.1.4.1 Tenant Satisfaction Measures (TSMs) commenced in April 2023 providing an opportunity for the service to receive direct feedback from tenants with regards to the service provided. Our report in 2024/25 demonstrated the difficult operating environment in which the service operated. In the table below we have provided our initial results for 2025/26 (embargoed until June 2026 to allow full sector validation) demonstrating improvements across the Board.

Code	Measure	% 2023/24	% 2024/25	% 2025/26	Position Year to Year	Benchmark LA 10k+	Benchmark Comparison
TP01	Proportion of respondents who report that they are satisfied with the overall service from their landlord.	63.20%	57%	67%	10% ↑	66%	1% ↔
TP02	Proportion of respondents who have received a repair in the last 12 months who report that they are satisfied with the overall repairs service.	68.80%	67%	75%	8% ↑	67%	8% ↑
TP03	Proportion of respondents who have received a repair in the last 12 months who report that they are satisfied with the time taken to complete their most recent repair.	66.30%	64%	72%	8% ↑	64%	8% ↑
TP04	Proportion of respondents who report that they are satisfied that their home is well maintained.	63.40%	59%	67%	8% ↑	67%	0% ↔
TP05	Proportion of respondents who report that they are satisfied that their home is safe.	69.40%	66%	73%	7% ↑	73%	0% ↔
TP06	Proportion of respondents who report that they are satisfied that their landlord listens to tenant views and acts upon them.	53.20%	50%	58%	8% ↑	50%	8% ↑
TP07	Proportion of respondents who report that they are satisfied that their landlord keeps them informed about things that matter to them.	60.70%	57%	67%	10% ↑	67%	0% ↔
TP08	Proportion of respondents who report that they agree their landlord treats them fairly and with respect.	73.40%	69%	75%	6% ↑	75%	0% ↔
TP09	Proportion of respondents who report making a complaint in the last 12 months who are satisfied with their landlord's approach to complaints handling.	23.20%	22%	25%	3% ↑	32%	-7% ↓
TP10	Proportion of respondents with communal areas who report that they are satisfied that their landlord keeps communal areas clean and well maintained.	56.10%	46%	54%	8% ↑	62%	-8% ↓
TP11	Proportion of respondents who report that they are satisfied that their landlord makes a positive contribution to the neighbourhood.	54.90%	50%	59%	9% ↑	59%	0% ↔
TP12	Proportion of respondents who report that they are satisfied with their landlord's approach to handling anti-social behaviour.	46.50%	40%	47%	7% ↑	57%	-10% ↓

2.1.4.2 We assess our performance against TSMs internally seeking year to year improvements, and externally against the sector benchmark provided by the Regulator of Social Housing. Internally, we have seen an average 8% increase. Our highest levels of improvement are in overall satisfaction this landlord (TP01) and landlord communication (TP07). Our lowest level of improvement is in complaints handling (TP09).

2.1.4.3 Externally, we are benchmarking as meeting or exceeding performance levels on nine and underperforming on three areas. Our lowest performing areas relate to satisfaction in how we've dealt with ASB (TP12), followed by communal area being cleaned and maintained (TP10). Insights from TSM are integrated into our quality assurance process. Cabinet will see targeted actions for lower-performing areas in both this report and our service improvement plan.

2.2 Service Updates

2.1 The Homes and Neighbourhoods directorate consists of four services: Asset Management and Building Safety, Governance and Assurance, Housing Management & Partnerships, and Repairs & Maintenance. The Council also provides essential support in areas like finance, HR, transformation, and marketing. This report summarizes key service activities.

2.2 Asset Management and Building Safety

2.2.1 The Asset Management and Building Safety service are responsible for the strategic management of our homes, and neighbourhoods (built assets). The service has faced pressure to improve compliance performance, mainly due to regulatory requirements. Leadership gaps at senior management levels have created additional challenge. In the past six months, efforts have centred on resolving both compliance and leadership issues.

2.2.2 A new Head of Service and two managers joined in January 2026. By March, additional recruits will add further technical expertise and stability to the team. Ove the last six months the service continued to be supported and challenged by officers from across Council with relevant skills serving on the Building Safety Assurance Board.

2.2.3 Between June and December 2025, the service achieved key milestones. Ensuring stock compliance remains a top priority. The service was able to report to Housing Portfolio Holder Briefing (PHB) Growth and Regeneration Scrutiny Panel (GRSP), and Homes and Neighbourhoods Improvement Board (HNIB) a full compliance update in January 2026. Going forward, this report will be regularly submitted to PHB, GRSP, and HNIB, due to rising compliance reporting requirements related to HHSRS and Awaab's Law.

2.2.4 By September, we completed water testing in 96.2% of our residential properties; the remaining 3.8% were inaccessible and received desk-based surveys, with plans for future physical checks. By December 2025, physical surveys had reached 99.76%.

Area	Target	Perf	RAG	Trend (qtr)
Gas safety certs (residential)	100%	99.9%		
Gas safety cert (communal)	100%	100%		
Electrical safety cert (residential)	100%	99.6%		
Electrical safety cert (communal)	100%	100%		
Stock with physical water risk assessment	100%	99.7%		
Stock with physical or desk top assessment	100%	100%		
Properties with a valid asbestos survey	100%	100%		
LOLER	100%	100%		
Properties with a valid FRA in place	100%	99.9%		
Fire remedial actions complete	100%	67.3%		
DMC inspections undertaken in timescale	100%	100%		
DMC works completed within timescale	100%	98%		

2.2.5 In October, Watts were commissioned as our partner to undertake a comprehensive stock condition survey over three years. We began with a slow rollout to ensure compliance and improve data quality, completing 813 surveys between October and December. From April 2026, the contractor will deliver over 800 surveys monthly, prioritising properties with known failures. This project is essential for maintaining accurate, up-to-date property data and informing condition, safety, and investment decisions. This data is essential for assessing property safety and planning future Capital Plan investments. It will inform the investment programme for 2027/28 and later, with analysis occurring over summer and autumn 2026.

2.2.6 In December, Cabinet approved a £390m capital investment plan—£264m for current stock and £126m for growth. This marks the first major investment in years, aiming to improve housing conditions. The initial 12-month plan is based on service intelligence, while year's 2–5 will be shaped by ongoing stock surveys. These investments are substantial and promise long-term benefits for tenants.

2.2.7 Regarding to stock growth, and with funding from Homes England, we are developing a growth pipeline in which we seek to deliver new council homes. In January 2026 we were successful in securing £300,000 from Homes England to support us create a pipeline of sites that are ready to go. This includes sites from across the borough. We would anticipate being in a position to progress bids for new homes in October 2026 with start on sites occurring early in the 2027/28 financial year.

2.2.8 The Assets service recognises progress in key accountabilities but acknowledges significant work remains. The next year will be pivotal in moving to a well-developed modern service. Alongside previously outlined steps, targeted projects will focus on improving aids and adaptations delivery and managing communal areas—a priority noted in 2025/26 TSM results.

2.3 Governance and Assurance

2.3.1 The Governance and Assurance Service are responsible for tenant engagement and insight, oversight of the regulatory compliance position, and service transformation projects.

2.3.2 We have collaborated with our involved customers to improve tenant engagement and communication formats and participation rates. We acknowledge more progress is needed and aim to expand options, including those not requiring in-person involvement. Over the last 12–18 months, more than 5,000 tenants and leaseholders have interacted with the Council's housing service through various channels, including face-to-face, text, and online. Engagement now uses a blended model—statutory, strategic, neighbourhood, and service-level forums—instead of one approach. The Council is moving from consultative engagement to one that is influential, measurable, and integrated into decision-making.

2.3.3 Making our service more transparent has boosted participation. We consistently share performance updates with tenants and the community. Our improved newsletter is more accessible, resulting in 62% of recipients opening it and a subscriber base of 5,016. Of those who gave feedback, half found the updates on safety and repairs especially useful. We launched a more accessible website in February 2026 to address key improvements from our Quality Assurance review, including accessibility and information availability. While this is progress, further enhancements are planned for cabinet review through tenant newsletters, local media, and social media channels.

2.3.4 In February we reported the Quarter 3 performance 2025/26 to Portfolio Holder Briefing outlines overall complaints performance across the service. Complaint volumes are similar to last year, with 211 Stage 1 cases and 68 escalations. Key issues include damp and mould, antisocial behaviour, repairs, property condition, and staff attitude. Upheld rates remain high at 61% for Stage 1 and 49.7% for Stage 2, reflecting ongoing problems with service quality, communication, and case handling. Performance against statutory and policy deadlines has worsened in all service areas.

2.3.5 During Q3, the Housing Ombudsman issued 26 determinations across nine cases. Outcomes, reported through Portfolio Holder Briefing, cover service failures, maladministration, and one severe maladministration related to delayed repairs and decanting. All orders were followed, but recurring issues with timeliness, communication, record keeping, and clarity indicate a need for greater accountability.

2.3.6 Complaint must be a priority for the service. Several improvements are in progress, such as better ASB audits, enhanced complaint investigation training, a new Pets Policy, and clearer repair time updates. Additional effort is needed to meet complaint deadlines, improve repair communication, and tackle the underlying reasons for upheld complaints.

2.3.7 In September 2026 the service implemented the directorate wide Quality Assurance Framework. This approach brings together the aspirations of our tenants, the requirements of the Regulator of Social Housing, and industry best practice. The framework requires quarterly review by the service to understand how we are performance, and crucially where we are experiencing gaps in our service provision. This allows us to create a service development plan ensuring that we continue to make necessary progress. The quality assurance framework approach provides the structure delivering the outcomes outline in section 2.1 of this report.

2.3.8 Ahead of an anticipated inspection in the summer 2026, we have commenced the process of creating a detailed self-assessment document. The service has made a commitment to continuous improvement delivered via the quality assurance process with a quarterly review and update to the self-assessment and service improvement action plan.

2.3.9 We have focused on gathering reliable property and tenant data to support a more insight-driven directorate. Upgrades to IT systems, including completing phase one of the CX housing management system and advancing the Total repairs system upgrade, are improving data consistency, resilience, and our platform for data management. This will provide platforms for incoming data from tenant census and stock condition survey.

2.3.10 The service is supporting modernising IT systems with two projects: CX transition for Housing Management and a Total upgrade for Repairs and Maintenance. The shift from Universal to CX was delivered in October 2025. The Total Upgrade project continues.

2.3.11 Between July and October 2025, the service reviewed its governance arrangements to modernise and align with sector best practices. The process led to improvements and clarification of existing structures.

- Clarified relationships between Cabinet, Portfolio Holder, and other key governance functions.
- Proposal to change the Homes and Neighbourhoods Improvement Board to an Assurance Board overseeing all Consumer Standards, the Rent Standard, and Building Safety Regulator duties.
- Two new oversight boards have been introduced: the Service Quality Assurance Board, which monitors non-technical service delivery, and the Housing Capital Revenue and Investment Board, which oversees capital investment and growth programmes.

2.3.12 The review enables us to continue to ensure that we have the correct levels of oversight and scrutiny for our services to ensure that we are maximising the impact to tenants and protecting our social housing assets.

2.4 Housing Management and Partnerships

2.4.1 Homes and Neighbourhoods receive all property allocations from the Council's Strategic Housing function, either directly or through the Choose and Move system. Most properties are allocated to Band A or B.

2.4.2 A new Tenancy Agreement, approved by Cabinet on 8 July 2026 and issued to tenants on 18 July 2026. The document updates our relationship with tenants by clearly outlining the rights and responsibilities of both parties. It covers secure and introductory tenancies, rent, anti-social behaviour, and demotion conditions. This agreement also helps us meet the Regulator of Social Housing's Tenancy Standard requirements.

2.4.3 In line with work on Tenancy Agreement, we have continued to develop our approach to service charges that we levy to tenants in addition to the rent paid. There are a wide range of service we provide against which additional charges can be made. Last year Cabinet took the decision to implement a phased approach to full cost recovery of the grounds maintenance service charge.

2.4.4 Over winter, the service shifted to a modern neighbourhood-led approach from a traditional housing management model. Over the next year, this will improve service standards for tenants. Our Community Engagement Teams presented these changes at Neighbourhood Forums and used feedback to refine our delivery.

2.4.5 We are sharing initial drafts of our Estate Plans on the Council website. Tenants can view these documents to understand our intended contributions. The plans will be updated at least quarterly as they progress and new ideas develop from ongoing discussions with tenants and the community.

2.4.6 The publication of our Tenant Satisfaction Measure results for 2024/25 indicated an issue for the service with anti-social behaviour (ASB) in our communities. In March 2025 Cabinet had approved a revised ASB Policy providing the tools for us to further address our approach. In September 2025 resources were re-prioritised to enable us to commence recruitment of a specialist ASB Team. This will be in place for March 2026 and delivering from the new financial year.

2.4.7 The Council collaborates with Safer Kirklees and West Yorkshire Police on ASB matters, aiming to strengthen these partnerships. We also support and receive help in areas like domestic abuse, homelessness, and temporary accommodation. Building future joint relationships is key to long-term service development within the Council and with external partners. Our caretaking service is increasingly productive, but tenant dissatisfaction with communal living spaces remains high. We need to strengthen this team and better use their resources to improve management and tenant satisfaction in these areas, as noted in TSM feedback.

2.5 Repairs and maintenance

2.5.1 Our repairs service performed well in 2024/25, completing 88,748 repairs—averaging 4.1 per property. Key metrics show consistent or improved results.

	Q1 2025/26	Q2 2025/26	Q3 2025/26
Emergency repairs completed on time	84%	87%	89%
Non-emergency repairs completed on time	96%	96%	96%
Tenant satisfaction (taken from TSM reports)	64%	72%	72%

2.5.2 Particularly pleasing in the performance table is the improvement in tenant satisfaction recorded in our TSM outcome report. There is a notable alignment between tenant satisfaction and a high performing repairs service.

2.5.3 The service has enhanced tenant communication by improving response methods and contact channels. Progress indicates that tenant satisfaction with repairs will keep rising steadily. Alongside responsive repairs, the service delivers for the capital programme, cyclical programmes, and compliance work for Asset Management and Building Safety. Their notable achievements include significant progress addressing damp, mould, and condensation issues.

2.5.4 The service has reduced cases from over 2,000 to consistently below 480. Since September, we identified 269 cases through proactive outreach and surveys. In December, the team's improved performance earned the internal High Five Award from the Chief Executive.

2.5.5 Void process management is now established in the service. The team has improved performance by refining their approach, consulting peer providers, and adopting best practices. Actions taken have reduced both the number of void properties and the turnaround time to relet them. Key outcomes include:

- The number of void properties has reduced from 440 (Sept 26) to 384 (Feb 26).
- The average number of days a property remained empty has reduced from 68 (Sept 26) to 58 (Feb 26).

2.5.6 Our ambition is to achieve a business-as-usual rate of 216 standard void properties (circa 1%) and an average relet timescale of 50 days.

3.0 Implications for the Council

3.1 Council Plan

3.1.1 The update supports the Council Plan by improving housing services, tenant safety, and quality of life. The report highlights progress in regulatory compliance for fire safety, damp and mould, and water hygiene, underscoring the Council's commitment to safe homes.

3.1.2 Moving to a neighbourhood-led management model fosters local relationships, delivers community-based services, and boosts responsiveness. Initiatives such as a new website, expanded newsletter, and Neighbourhood Plans improve transparency, strengthen tenant engagement, and promote accountability.

3.1.3 Better performance in repairs, voids, and complaints aligns with the Council Plan's focus on reliable services. Reduced damp, mould, and condensation, along with higher repair satisfaction, demonstrate positive impacts on tenants' wellbeing. Improvements in governance, data quality, digital systems, and regulatory assurance help build a modern, sustainable organisation prepared for future challenges.

3.2 Financial implications

3.2.1 The report highlights significant financial commitments required to continue to improve the safety, quality, and long-term sustainability of Council housing. Cabinet has approved a £390m Capital Investment Plan, including £264m for existing stock and £126m for new housing growth. This programme addresses decency, compliance, and major asset renewal needs, with years 2–5 informed by the ongoing stock condition survey. The service has additionally secured £300,000 from Homes England to support development of the future housing growth pipeline.

3.2.2 Continuing safety obligations, particularly the completion of fire safety actions may present financial pressures that need to be met as the service works to accelerate delivery in line with regulatory expectations. Other areas with ongoing revenue implications include the shift to neighbourhood-led housing management, data improvement programmes, and IT system upgrades (CX and Total). Collectively, these commitments are essential to stabilising the service and ensuring long-term HRA sustainability.

3.3 Legal and regulatory implications

3.3.1 The report outlines activity directly linked to the Council's statutory responsibilities as a registered social housing provider. Work to address fire safety, damp, mould, condensation, and water hygiene reflects the Council's duties under the Housing Act 2004, including compliance with the Housing Health and Safety Rating System (HHSRS) and emerging requirements such as Awaab's Law. The completion of Fire Risk Assessments and delivery of associated actions relate to obligations under the Regulatory Reform (Fire Safety) Order 2005, and delays in completing overdue actions present heightened legal and regulatory risk.

3.3.2 The service's compliance work is also tied to the Regulator of Social Housing's Consumer Standards, including Safety and Quality, Tenancy, Transparency and Accountability, and Neighbourhood Standards. Ongoing Quality Assurance activity and strengthening of data and record-keeping support the Council's legal requirement to demonstrate auditability and regulatory readiness.

3.3.3 Updates to the Tenancy Agreement and work on service charges must comply with relevant housing and landlord legislation, including the Landlord and Tenant Act 1985 and the forthcoming 2026 Rent Standard. Continued improvement in complaints handling is necessary to meet the Housing Ombudsman's Complaint Handling Code and avoid further findings of maladministration.

3.4 Climate Change and Air Quality

3.4.1 Our planned investment in safer, better-quality homes will help improve energy performance and reduce environmental impact over time. By modernising properties, tackling damp and mould, and improving repairs and maintenance, the service supports healthier homes, lower emissions, and more sustainable neighbourhoods across the borough.

3.5 Risk, Integrated Impact Assessment (IIA) or Human Resources

3.5.1 Key risks include overdue fire safety actions, regulatory pressure under the ongoing notice, data and IT system reliability issues, and weaknesses in complaints handling. Capacity demands across compliance, investment, and transformation programmes may also affect delivery. These risks are being monitored and addressed through established governance and improvement plans.

4.0 Consultation

4.1 This report summarises input from tenants, partners, and staff. Improved tenant engagement through the website, newsletters, forums, and planning has driven service enhancements. Feedback, including complaints and surveys, has helped identify priorities like antisocial behaviour, repair communication, and communal standards.

4.2 Consultation with members has occurred via Portfolio Holder, Growth and Regeneration Scrutiny Panel and Cabinet. Internal consultation via governance ensures regulatory and Council Plan alignment. The service will continue engaging stakeholders to improve transparency and resident experience.

5.0 Engagement

5.1 Input from tenants, partners, and staff shaped this report's priorities. Feedback via newsletters, the website, forums, complaints, and satisfaction measures guided our focus on repairs communication, antisocial behaviour, and communal areas.

5.2 Services have worked through governance forums to align with regulations and the Council Plan. Engagement will continue as improvements are made, keeping tenants' input central to service design and delivery.

6.0 Options

6.1 Options considered

6.1.1 Not applicable for this report.

6.2 Reasons for recommended option

6.2.1 Not applicable for this report.

7.0 Next steps and timelines

7.1 Not applicable for this report.

8.0 Contact officer

8.1 Phil Jones
Service Director Homes and Neighbourhoods
Philip.jones@kirklees.gov.uk

9.0 Background Papers and History of Decisions

9.1 Not applicable for this report.

10.0 Appendices

10.1 Not applicable for this report.

11.0 Service Director responsible

11.1 Phil Jones
Service Director Homes and Neighbourhoods
Philip.jones@kirklees.gov.uk

Report title: Cooper Bridge delegation of executive functions from Calderdale Council to Kirklees Council

Meeting	**Cabinet**
Date	**24 March 2026**
Cabinet Member	**Councillor Crook, Deputy Leader of the Council - Transport and Housing**
Key Decision **Eligible for Call In**	**No** **Yes**

Purpose of Report:
The purpose of the report is to seek Cabinet approval for the acceptance of executive functions which have been delegated by Calderdale Council (CMBC) to Kirklees Council (KMBC) (together the Authorities) to support the ongoing development and delivery of the Cooper Bridge improvement scheme (the Scheme). The specific executive functions are those within the Town and Country Planning Act 1990 (TCPA 1990), the Highways Act 1980 (HA 1980), and the Road Traffic Regulation Act (1984) (RTRA 1984).

Recommendations:

It is recommended that Cabinet:

1. Note the contents of this report and the attached appendices which include:
   Appendix A: Executive and non-executive functions
   Appendix B: Preferred option
   Appendix C: Cabinet Report 23 January 2024

2. Provide approval for all executive functions under the TCPA 1990, the HA 1980 and the RTRA 1984 required to deliver the Scheme to be accepted by KMBC which have been delegated from CMBC.

3. Delegate authority to the Executive Director for Place, in consultation with the Service Director for Legal, Governance & Commissioning and the Portfolio Holder for Transport, to negotiate and agree the terms of the Agreement with CMBC to enable the delegation of the executive functions under the TCPA 1990, the HA 1980 and the RTRA 1984 as set out in Appendix A.

4. Delegate authority to the Service Director for Legal, Governance & Commissioning to seal and complete the Agreement and enter into any and all additional legal documents necessary to accept the delegation of the specific executive functions under the TCPA 1990, the HA 1980 and the RTRA 1984 as set out in Appendix A.

5. Delegate authority to the Executive Director for Place, in consultation with the Cabinet Member for Transport & Housing, and the Service Director for Legal, Governance & Commissioning, to accept the delegation of any specific additional executive functions not listed at Appendix A

from CMBC should such functions become necessary to enable KMBC to deliver the Scheme and to negotiate and agree the terms of any such delegation of executive functions.

6. Delegate authority to the Service Director for Legal, Governance & Commissioning to seal and complete any supplemental or additional legal documents necessary to accept the delegation pursuant to the recommendation 5, above.

Reasons for Recommendations

To enable Kirklees Council (KMBC) to enter into Calderdale Council's (CMBC's) land so that it may lawfully implement and deliver the Scheme. KMBC requires particular powers and functions to be delegated or transferred to it from CMBC. If Cabinet is so minded, it must approve the transfer and delegation of the executive powers set out in full at Appendix A and any additional executive powers or functions which become necessary as the Scheme is progressed.

As discussed later within this report, having considered the options available to deliver the Scheme in an efficient and timely manner, both Authorities agree that it will be more efficient for KMBC to carry out particular statutory functions on behalf of both Authorities, including acquiring third party land for the Scheme and carrying out works on land within both Authorities' boundaries. KMBC would effectively take on the role of CMBC and deliver the Scheme on CMBC's land. Without the approval to accept the delegation of executive functions, there would remain a significant risk of the Authorities taking inconsistent approaches to the delivery of the Scheme, which may be compromised. The associated risks are detailed within Section 3.5.

Resource Implication:

KMBC are the lead Council for the Scheme and responsible for progressing the various stages in the process, including preparing the business case, the joint planning application and the design, securing funding, and managing all associated costs. The additional resources required for the delegation of executive functions from CMBC to KMBC includes time spent by the Authorities in appointing and instructing external solicitors for the provision of legal advice and the drafting and negotiation of the Agreement. KMBC will cover CMBC's professional costs in connection with negotiation and completion of the Agreement.

It should also be noted that the Scheme will fully be funded up to a defined amount by the West Yorkshire Combined Authority (WYCA). If the costs of the Scheme exceed this defined amount, there is a risk that WYCA will not fund the shortfall. As KMBC are the contracting party with WYCA, the financial risk falls entirely to KMBC. However, there are measures in place to ensure the risk of exceeding the funding allocation is minimised through the use of Early Contractor Involvement (ECI) and the WYCA assurance process (see Figure 3) as detailed within the Financial Implications section of this report (section 3.2).

Date signed off by the Executive Director for Place	**David Shepherd, 16.03.26**
Is it also signed off by the Service Director for Finance?	**Kevin Mulvaney, 16.03.26**
Is it also signed off by the Service Director for Legal Governance and Commissioning?	**Samantha Lawton, 16.03.26**

Electoral wards affected:
Liversedge and Gomersal, Mirfield and Ashbrow.

Ward councillors consulted:
Ward Councillors have been consulted at previous stages of the Scheme during November and December 2024.

Public or private
Public.

Has GDPR been considered?
This report contains no information that is considered as being personal data nor does it identify any individuals.

1. Executive Summary

It is intended that the delivery of the Scheme will provide highway benefits by improving bus journey times and reliability, supporting future bus franchising, in alignment with regional growth priorities and WYCA's LTP4 ambitions for a more efficient, sustainable transport network. The successful delivery of the Scheme will also unlock new housing and employment land in accordance with KMBC's Local Plan. The Scheme's extent (Figure 1 below) spans the administrative boundaries of both Authorities.

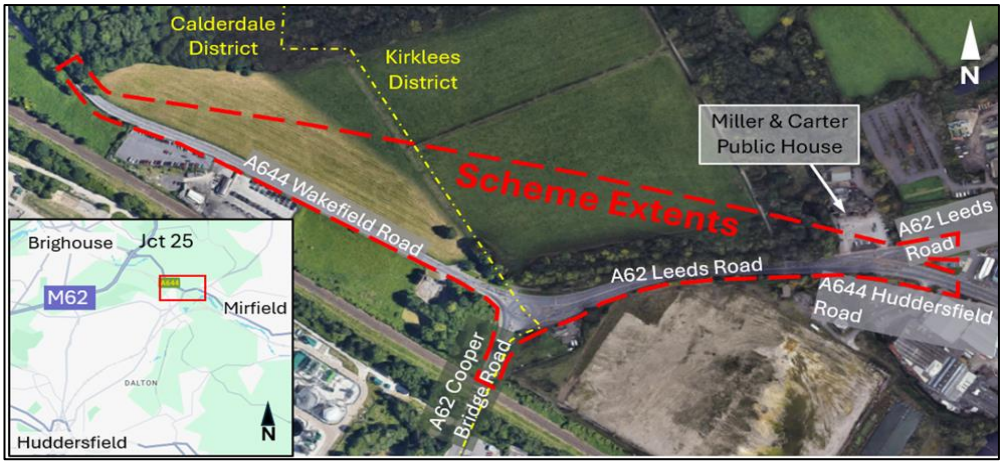

Figure 1: Scheme extent

Although the Scheme is jointly promoted by KMBC, CMBC and WYCA, the majority of the Scheme lies within KMBC's administrative area and, as such, is led by KMBC. The Authorities have agreed in principle, subject to the necessary delegation of powers, that KMBC shall have the ability to determine the planning application, implement the planning consent and monitor compliance with its conditions or obligations within its own and CMBC's boundaries.

The executive powers to be delegated by CMBC to KMBC are limited to specific powers within the TCPA 1990 the HA 1980 and the RTRA 1984 being those powers required to deliver the Scheme. Following the delegation of the requisite functions, KMBC may only exercise those powers within the defined boundary of the Scheme permitted by the planning consent.

The delegation of powers is effected by the Authorities entering into the Agreement. The Authorities have agreed many of the principles of the Agreement and are in the process of

finalising a Heads of Terms (HOTs) capturing these. The draft HOTs shall then inform the drafting of the terms of the Agreement.

This report relates solely to the acceptance of the delegation of executive functions from CMBC to KMBC under the HA 1980, the TCPA 1990 and the RTRA 1984. The receipt of such powers will enable KMBC to deliver the entirety of the Scheme by using the powers delegated to it by CMBC to do so. A full list of the specific executive functions is set out at Appendix A. Due to the Cabinet's status as an executive body, it may only make decisions concerning the executive functions of KMBC. A separate report went to Full Council on 11/03/26 where the transfer of non-executive powers in respect to decisions under the TCPA 1990 and the HA 1980 required to deliver the Scheme was approved.

2. Information required to take a decision

Background

The existing A62/A644 Cooper Bridge junction operates as a signalised three arm roundabout linking the A62 Cooper Bridge Road to the south, the A644 Wakefield Road to the west, and the A62 Leeds Road to the east. The junction forms one of the busiest corridors in the district and currently experiences significant congestion during both morning and evening peak periods, contributing to slow journey times and poor air quality.

The area is constrained, with protected trees located to the north and several key transport structures, including railway, river, and canal bridges, immediately to the south.

To achieve the Schemes objectives the proposed improvements are to:

- Increase the junction's capacity and improve traffic flow for all vehicles through targeted highway upgrades and optimised signal timings to help relieve congestion and improve journey time reliability.
- Deliver segregated cycling infrastructure around the Cooper Bridge junction to encourage safer and more attractive active travel options.
- Improve walking and shared use routes by upgrading footways and providing enhanced pedestrian and cyclist environments.
- Introduce new and improved signal-controlled crossings to support safer and more accessible movements for both pedestrians and cyclists throughout the junction area
- Contribute to public transport improvements across the wider corridor.

Further detail on the preferred option for the improvements is provided in Appendix B.

These improvements will require additional land in third party ownership to the north of the existing highway boundary. KMBC are negotiating with landowners to purchase this land by agreement. The land requirements are highlighted within Figure 2 and include:

- Land 1: land in third party ownership which crosses the CMBC and KMBC administrative area boundary line.
- Lands 2, 3 and 4: land in third party ownership which is wholly within the KMBC boundary.

Figure 2: Landownership plan

The Scheme will be subject to the grant of planning permission for the Scheme. The planning application is being prepared by and will be submitted on behalf of KMBC. The Authorities agree (subject to obtaining the necessary Cabinet approvals) that KMBC shall then determine the application, grant the planning consent, if minded to do so, and then implement and monitor the Scheme within both Authority's areas.

Cost Breakdown

The Scheme is projected to cost in the region of £53.5 million which shall be funded by WYCA. KMBC is the lead Authority and therefore shall incur the costs associated with the delivery of each element of the Scheme, from start to finish. In addition to the costs associated with the preparation of the planning application, KMBC has met the cost of preparing the business case to secure funding, designing the Scheme, carrying out stakeholder and public consultations, and negotiating the sale of land required for the Scheme currently in third party ownership. KMBC will meet all future costs associated with the determination of the planning application and monitoring its implementation.

The Scheme is currently at the Outline Business Case (OBC) stage (Activity 3) of the WYCA Assurance process (see Figure 3).

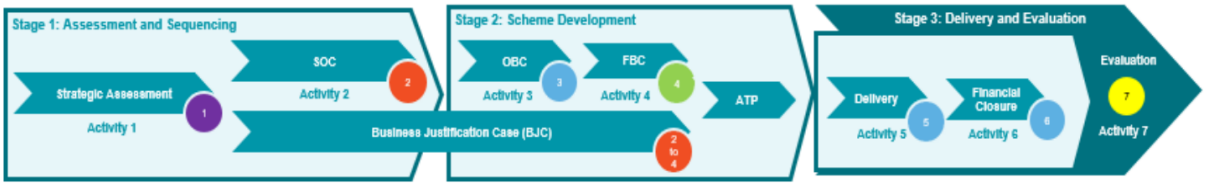

Figure 3: Overview of the WYCA assurance process

The costs associated with the delegation of the required executive functions detailed in this report are included within the overall cost of the Scheme. The costs associated with the lawful delegation of powers and functions from CMBC to KMBC include the cost of officer time, of appointing and instructing external solicitors for the provision of legal advice and for the drafting and negotiation

of the HOT and the Agreement. KMBC will also cover CMBC's its professional costs in connection with the Agreement.

Timescales

Subject to receiving CMBC and KMBC Cabinet and Full Council approval to delegate executive and non-executive functions the Scheme shall be progressed in accordance with the following timeline:

- Consultation: Summer 2026
- Submission of planning application: Autumn 2026
- Approval to proceed to Full Business Case: Early 2027
- Construction: Early 2028 to late 2029 (subject to WYCA approval through the assurance process – see Figure 3 above).

Expected impacts, outcomes, benefits and risk management

As highlighted within Section 6, two options have been considered.

- Option one proposed the delivery of the Scheme without a delegation of functions to KMBC.
- Option two proposed the delivery of the Scheme following the delegation of functions to KMBC.

Option two was determined to be the most effective and efficient use of public funds and allowed the delivery of the Scheme in an expedient manner. It is anticipated that option two would avoid the duplication of both work and costs by the Authorities, reduce any confusion as to which Authority is responsible for discrete elements or phases of the Scheme and remove any inconsistency of approach between the two Authorities. It would provide reassurance to the residents of both Authorities, WYCA and the third-party landowners that the Scheme can be delivered (or the Secretary of State in the event a compulsory purchase of land is required).

Risks associated with the delegation of executive functions have been highlighted within Section 3.5 of this report. All associated risks have been logged within the risk register and all risks will be managed by KMBC.

The risks of the Scheme are captured, assessed, and reported upon on a continual basis. The topic of 'Risk' is a standing agenda item at all Cooper Bridge Board meetings, which take place at six weekly intervals and are chaired by the Service Director for Skills and Regeneration for KMBC and attended by KMBC's Head of Risk, who sits as a board member. Reassurance should be taken from the continuous monitoring and reporting of risks to the board, which enables risks to be addressed, and mitigated where possible, at an early stage.

Services and agencies involved

The Scheme is a complex, multi-disciplinary project involving a number of KMBC's services and the appointment of external professional and construction services from the following:

- KMBC Major Projects
- KMBC Highways
- KMBC Legal

- Professional external consultants from disciplines such as planning, land strategy and acquisition, surveying, and legal.

CMBC officers attend the Cooper Bridge Board meetings and have been involved in reviewing and approving designs produced by the lead designers at KMBC.

Should Cabinet decide not to approve KMBC's acceptance of the delegation of the executive functions from CMBC, there could be an appreciable impact upon the agreed timeline for the delivery of the Scheme. Should the necessary executive functions not be delegated to KMBC, CMBC would be required to play a far greater role and incur additional time and costs. CMBC would also need to provide additional resources to carry out its statutory functions. Without the benefit of executive powers being delegated to KMBC, the delivery of the Scheme would be far more complex and risk being delayed, which may also affect its funding by WYCA.

3. Implications for the Council

Approval by Cabinet of KMBC's acceptance of the delegation of executive functions from CMBC would allow for the most cost effective and efficient delivery of the entire Scheme by KMBC in both Authorities' administrative areas.

The delivery of the Scheme will support the objectives for development and infrastructure set out in KMBC's adopted Local Plan, which is currently being revised and updated, including the target of delivering 31,140 new homes during the current Local Plan period. This is highlighted within Figure 4 and 5 below which shows Cooper Bridges location in relation to KMBC's site allocation within the Local Plan and a table showing the location and size of the site allocations near Cooper Bridge. In addition to Figures 3 and 4 is site HS61 'land south of Ravensthorpe Road / Leeds Road, Dewsbury' which is also known as Dewsbury Riverside. This includes 1,869 dwellings over the existing Local Plan and a further 2,131 dwellings beyond the plan.

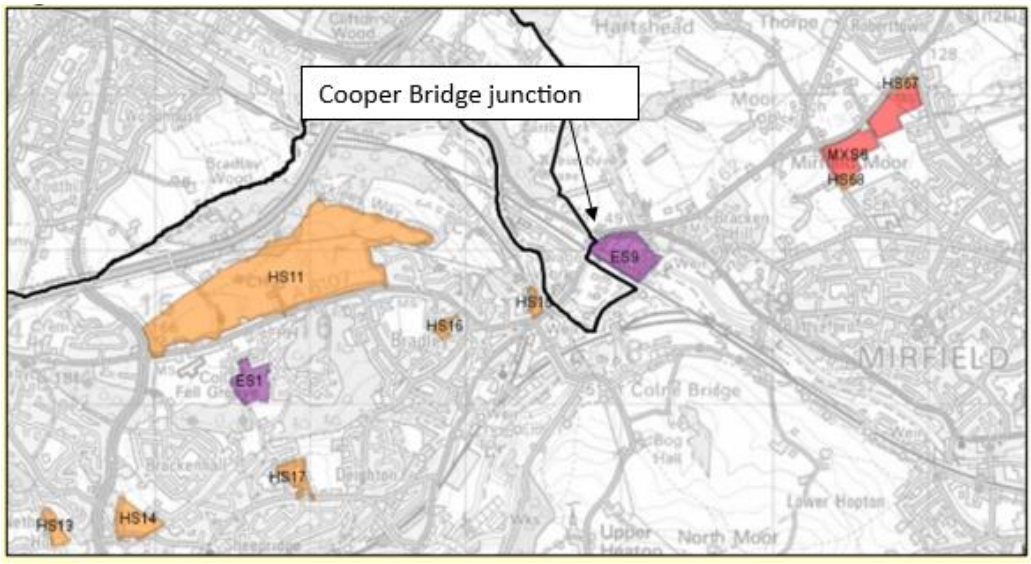

Figure 4: Site allocation map within the Local Plan

Ref:	Site Description	Size & Site Allocation
ES9	Site of former Cooper Bridge Waste Water Treatment Works	8.49 hectares 14,910m^2 employment space
ES1	Land south of Bradley Business Park, Dyson Wood Park, Bradley	4.76 hectares 15,155m^2 employment space
HS11	Land north of Bradley Road, Bradley	68.32 hectares Housing capacity 1,958No.
H16	Land south of St Thomas Gardens, Bradley	0.95 hectares Housing capacity 18No.
H10	Land west of Lower Quarry Road, Bradley	0.87 hectares Housing capacity 30No.
MXS6	Land at Slipper Lane, Leeds Road	12.26 hectares mixed use 21,528m^2 employment space and 166No. housing capacity
HS67	Former allotments, Leeds Road, Mirfield	0.65 hectares Housing capacity 22No
HS68	Land to the east of Slipper Lane, Mirfield	0.69 hectares Housing Capacity 21No

Figure 5: Table showing site allocation within the Local Plan

The Local Plan references Cooper Bridge within Allocations and Designation document, Policy Site TS1- A62:

'Improved access to the M62 will provide wider connectivity improvements. The scheme also supports employment growth in the Cooper Bridge area and general development growth along Leeds Road corridor by providing better access to and from existing and new housing in Huddersfield, Dewsbury, North Kirklees, and parts of Calderdale, in particularly South Dewsbury and Bradley'.

Without Cabinet approval for the acceptance of the delegation of executive functions from CMBC to KMBC, the deliverability of the Scheme would be compromised. This would further impact KMBC's ability to achieve the objectives of its adopted Local Plan.

3.1 Council Plan

The A62 Cooper Bridge junction is the primary link between Huddersfield and North Kirklees as well as linking Huddersfield with Leeds (via the M62). Current and future congestion and its impact at Cooper Bridge, as well as the relatively poor public transport services result in a significant constraint in the labour market, future job opportunities and capacity to facilitate the transformational growth opportunities identified in the Local Plan. Delivery of the Scheme will facilitate transformational growth and in doing so support the Council Plan.

The Scheme supports Council Plan priorities such as promoting sustainable and inclusive economic growth and development and delivering an effective road network.

Without the delegation of executive functions from CMBC to KMBC, delivering the Scheme and the associated objectives of the Local Plan will be more difficult.

3.2 Financial Implications

Without Cabinet approval for the acceptance of the delegation of executive functions from CMBC to KMBC both Authorities would need to progress and implement the Scheme within their own land. Both Authorities would have to resource procuring contractors and professional services, resulting in additional costs and a less efficient use of public funds. In addition to the risk of cost escalation, this approach may risk uncertainty or inconsistencies in timings due to potential delays in the Authorities being able to resource the additional work required.

It should be noted that this Scheme is funded by WYCA under a contract with KMBC alone. The Scheme does not currently include any requirement for borrowing. Should Scheme costs escalate and exceed the funding allocation there is no guarantee that WYCA would fund any shortfall.

Various measures are in place to ensure the risk of exceeding the funding allocation is minimised. This includes:

- The appointment of ECI at the Outline Business Case stage to provide a greater level of cost assurance during the development phase which minimises the chance of high-cost fluctuations.
- The business case is subject to the WYCA assurance framework (see Figure 3). This ensures that if any cost shortfalls are identified they can be reviewed at the Gateways.

3.3 **Legal Implications**

The relevant legal provisions regarding delegation of functions between local authorities are Section 101 of the Local Government Act 1972 and Section 9EA of the Local Government Act 2000 (LGA 2000).

When dealing with the issue of delegation of functions between local authorities, it is important to distinguish which of the functions to be delegated are executive functions (i.e. responsibility of Cabinet) and which are non-executive functions (i.e. responsibility of Full Council). In this regard, Section 9D of the LGA 2000 and the Local Authorities (Functions and Responsibilities) (England) Regulations 2000 (the 2000 Regulations) provide clarity on this point. The 2000 Regulations set out a list of functions which cannot be executive functions and provide that, as a starting point, any function which is not expressly set out in the 2000 Regulations as a non-executive function can (subject to a small number of exceptions) be considered as an executive function.

The Parts and Sections of the legislation set out at Appendix A of this Cabinet report have been considered against the provisions of Section 9D of the LGA 2000 and the 2000 Regulations to ascertain the classification of each power or function. This ensures that the delegation of such functions is subject to the proper scrutiny and approval of the appropriate committees and persons within the Authorities (i.e. Cabinet or Full Council).

Depending on the terms of the Agreement it might also be necessary to utilise the powers under Section 8 of the HA 1980. This section empowers local highway authorities to enter into a legal agreement to carry out works upon another highway authority's highway. Each of the Authorities is a local highway authority.

Article 11.4(b) of CMBC's Constitution, which provides for delegation of executive functions to other local authorities, permits CMBC to delegate all executive functions set out in Appendix A to KMBC. Article 11.4(c) of KMBC's Constitution enables KMBC to accept the delegation of executive functions from another local authority.

3.4 **Climate Change and Air Quality**

A Cabinet decision to approve the acceptance of the delegation of executive functions would not have a direct impact on climate change and air quality.

3.5 **Risk, Integrated Impact Assessment (IIA) or Human Resources**

Risk

The executive functions delegated from CMBC to KMBC which this Cabinet report seeks approval for will enable KMBC to deliver the Scheme. Discrete activities KMBC must undertake include designing the Scheme, undertaking surveys, submitting the planning application, discharging planning conditions, progressing the business case through the WYCA assurance process, procurement for construction, overseeing construction, managing finance and monitoring compliance with ongoing planning obligations and conditions, for example.

Should the Agreement not be entered into by the Authorities and all executive functions not be delegated to KMBC, the Scheme would not be deliverable without significant additional resources required.

As KMBC is the contracting party it will be taking the financial risks associated with the project. It should also be noted that the Scheme will fully be funded by WYCA from a defined amount. If the project should exceed the defined amount, then there is a risk that WYCA will not fund the shortfall. However, this risk has been mitigated against as explained in section 3.2 Financial Implications.

High level risks associated with not delegating executive functions for the Scheme are summarised within Figure 6.

Figure 6: Risk assessment

Category	Risk	Impact	RAG
Design	KMBC will not have the right to enter on to CMBC land to conduct surveys or investigations necessary to inform the design of the Scheme	As KMBC is the lead designer this will compromise our ability to complete the detailed design.	Red
Design	KMBC and CMBC to employ separate companies to conduct surveys or investigations within their respective boundaries to inform the design of the scheme	This will require additional resources from Calderdale for procurement and Kirklees as we would be required to obtain information from two separae companies to inform the design. It could potentially lead to delays due to surveys being undertaken at different times or additional complexities as the survey companies within each authority boundary may use different methodologies which may not be compatible with each other.	Amber
Design	KMBC and CMBC to ensure the same companies are appointed to conduct surveys or investigations across both boundaries to inform the design of the scheme	This will require additional resources when appointing services and an agreed procurement approach between both Authorities. This could potentailly lead to delays due to requiring CMBC input into the procurment process.	Green
Construction / finance	CMBC procure separate contractors to build the scheme within their boundary	Increased cost due to an additional procurement exercise required by CMBC. There is also potential for delays if CMBC were to delay the appointment of a contractor meaning start on site within CMBC would be later than the contractor for KMBC. Additional, the two contractors would have to co-ordinate and work in close proximity which may increase costs due to the complexitiy of it. Finally the mechanism for payment will have to be agreed as funding from WYCA currently goes to KMBC only.	Amber
Construction / finance	CMBC to work with KMBC to ensure the same contractor is undertaking the construction	Additional resources required to ensure the contract with the contractor meets the needs of both KMBC and CMBC. Other legal matters such as who will assess compensation events will need to be agreed along with agreeing how payment structures will be set up. This leads to additional work at the contract stage and through out delivery when monitoring the works.	Green
Public perception	If each Authority is responsible for delivering the scheme within their own boundary this could confuse the public on who is delivering the scheme.	Public not sure who to contact for scheme progress and updates. The public may also receive different dates on scheme completion depending if it is in the KMBC or CMBC boundary leading to confusion and negative press.	Amber

Integrated Impact Assessment

The decision for KMBC to accept delegated executive functions from CMBC has no impact on protected characteristic groups as defined in the Public Sector Equality Duty, under the Equality Impact Act 2010. As such an IIA has not been included with this Cabinet report.

4 Consultation

There has been no public or external stakeholder consultation in respect of the delegation of executive functions from CMBC to KMBC. The decision would have no direct impact on the public or external stakeholders and is an agreement between CMBC and KMBC.

The previous iteration of the scheme was subject to two public engagement exercises the first being in 2019 and the second 2021. However, in September 2024 there was a change request approval to phase the works with the funding being reduced from £75.1m to £53.5m.

As part of the reduced scope three designs were put forwards which included option A (roundabout), option B (gyratory), and option C (T-junction). From 28 October to 8 December 2024 these three options were consulted on with the consultation being hosted on the YourVoice webpage (A62 to Cooper Bridge Corridor Improvement Scheme - second consultation | Your Voice). The consultation also included two face-to-face events held at Battyeford Sporting Club on 13th and 19th November 2024.

During the consultation period 1,725 visits were made to the YourVoice page and 123 survey responses were submitted. The consultation outcome report concluded that there was support for each of the three options.

In addition to the public consultation two stakeholder workshops were held which helped inform the optioneering process. The workshops were held on 28th October 2024 and 11th December 2024.

The feedback received from the 2024 public consultation and stakeholder engagement was used as part of a sifting exercise to help determine the preferred option. The preferred option is presented as Appendix B.

A further consultation is planned during summer 2026 on the preferred option (Appendix B). The consultation is a requirement for a planning application which will be submitted late summer 2026.

5 Engagement

There has been no wider stakeholder engagement in respect of the delegation of non-executive functions from CMBC to KMBC, as the decision is an operational matter between CMBC and KMBC.

As highlighted above, public consultation and stakeholder engagement were undertaken most recently in 2024, with the stakeholder engagement element occurring over two workshops on the 28th October 2024 and 11th December 2024. The feedback was used as part of a sifting exercise to help determine the preferred option. The preferred option is presented as Appendix B.

6 Options

6.1 Options Considered

Two options for the delivery of the Scheme were considered:

- Option 1: following the grant of planning permission for the Scheme, each Authority shall implement and carry out the works required to deliver those elements of the Scheme situated within the red line boundary of the planning consent and its own administrative boundary.

- Option 2: KMBC delivering the Scheme in its entirety within both Authority's boundaries using delegated powers and functions transferred by CMBC.

6.2 **Reasons for recommended Option**

Option 1 was considered and dismissed. KMBC wish to deliver the Scheme in an efficient, cohesive, and expedient manner using grant funding to meet only those costs reasonably and properly incurred. KMBC consider that the risk of duplication of work and consequent increased cost is high and may lead to the confusion of stakeholders and residents of each Authority's role.

If both Authorities implemented the Scheme on their own land, both Authorities would have to resource the time and cost of procuring contractors and professional services and carrying out the highway works. In addition to the potential increased cost, this approach may risk uncertainty or inconsistencies in timing, especially if one Authority is delayed in being able to resource the undertaking or inspecting of the works or contractors being unavailable.

Option 2 was determined to be the most efficient use of public funds and the most expedient way the Scheme could be delivered. As noted above, this would avoid duplication of work, reduce any confusion as to which Authority is responsible for discrete elements or phases of the Scheme and remove any inconsistency of approach between the two Authorities. It would provide reassurance to the residents of both Authorities, WYCA and the third-party landowners that the Scheme can be delivered.

The functions transferred or delegated to KMBC shall enable it to deliver the Scheme. Discrete activities KMBC must undertake include designing the Scheme, undertaking surveys, submitting the planning application, discharging planning conditions, progressing the business case through the WYCA assurance process, procurement for construction, overseeing construction, managing finance and monitoring compliance with ongoing planning obligations and conditions, for example.

Should the Agreement not be entered into by the Authorities and all executive powers and functions not be delegated or transferred to KMBC, it would increase the risk of the scheme not being deliverable.

7 Next steps and timelines

The delegation and acceptance of non-executive functions have been approved by both authorities. The delegation of executive functions has been approved by CMBC. Should the acceptance of those executive functions be approved by KMBC Cabinet, the Authorities shall progress the drafting, negotiation, and completion of the Agreement, subject to the terms of the Agreement being approved by the respective Executive Directors for each Authority.

This report is intended for the Cabinet for a decision concerning the approval to accept the delegation of executive functions under the TCPA 1990, the RTRA 1984 and the HA 1980 which are required to deliver the Scheme.

As mentioned above, a separate report went to Full Council on 11th March 2026 where it received an approval to accept the delegation of non-executive functions under the TCPA 1990 and the HA 1980 which are required to deliver the Scheme.

Subject to receiving KMBC Cabinet approval to transfer executive functions (as listed in Appendix A) the following timelines apply:

- Submission of planning application: Autumn 2026
- Approval to proceed to Full Business Case: Early 2027
- Construction: Early 2028 to late 2029 (subject to relevant approvals).

8 Contact officer

Farhad Rahman, Project Manager, Major Project
Ilyas Ramjan, Head of Major Projects

9 Background Papers and History of Decisions

Cabinet report 23 January 2024 has been attached (Appendix C). The key decisions the Cabinet report approves include:

- To phase Cooper Bridge Scheme due to escalating cost. The report states '*to make Phase 1 the Coper Bridge roundabout element only. Subsequent phases could then look to address widening under the rail bridge and improvements to Bradley junction at a later date if traffic modelling demonstrated the need still existed and other funding sources were available.'*
- To allocate £53.5m to Cooper Bridge Phase 1. The previous allocation from the WYTF programme was £75.1m. The difference is to be allocated to other projects within the WYTF which had a shortfall.

10 Appendices

Appendix A: Executive and non-executive functions
Appendix B: Preferred option
Appendix C: Cabinet Report 23 January 2024 (error with the date on the Cabinet Report)

11 Service Director responsible

David Wildman, Service Director for Skills & Regeneration.

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Act	**Parts of Act**	**Sections within Part**	**Sections of Parts containing Executive Powers**	**Sections of Parts containing Non-Executive Powers**
Town and Country Planning Act 1990	Part III (Control over development)	Ss 55 to 106D	*All sections between Ss 55 to 106D (inclusive) not listed in next column*	S59A(1)(b) S69 S70(1)(a) S70(1)(b) S70A S72 S73 S73A S76 S92 S94(2) S102 S106
	Part VI (Blight)	Ss 137 to171	*All sections*	
	Part VII (Enforcement)	Ss 171A to 196E	*All sections between Ss 171A to 196E (inclusive) not listed in next column*	S171C S171E S172 S183(1) S187A S187B S191(4) S192(2) S196A
	Part VIII (Special controls)	Ss 197 to 225E	*All sections between Ss 197 to 225E (inclusive) not listed in next column*	Ss 197-214D S215(1) S220
	Part IX (CPO powers)	Ss 226 to 246	*All sections*	
	Part X (Highways)		*All sections between Ss 247 to 261 (inclusive) not listed in next column*	S247 S257 S258
	Part XII (Validity)	Ss 284 to 292	*All sections*	
	Part XIV (Financial provisions)	Ss 303 to 314	*All sections*	
Highways Act 1980	Part I (Highway Authorities and agreements between	Ss 1 to 9	*All sections including specifically* S8	

	Authorities)			
	Part III (Creation of highways)	Ss 24 to 35	*All sections between Ss 24 to 35 (inclusive) not listed in next column*	S25 S26 S31A
	Part IV (Maintenance of highways)	Ss 36 to 61	*All sections*	
	Part V (Improvement of Highways)	Ss 62 to 105.	All sections	
	Part VIII (Stopping up and diversion)	Sections 116-129	*All sections between Ss 116 to 129 (inclusive) not listed in next column*	S118 S118ZA S118C(2) S118A S118B S119 S119ZA S119C(4) S119A S119B S119C(3) S119D S121B S121C
	Part IX (Enforcement)	Ss 130 to 185	*All sections between Ss 130 to 185 (inclusive) not listed in next column*	*S130* *S130A* *S130B(7)* *S135* *S135A* *S135B* *S139* *S142* *S147* *S149* *S169* *S171* *S172* *S178* *S179* *S180*
	Part XII (CPO powers)	Ss 238 to 272	*All sections*	
	Part XIII (Financial Provisions	Ss 272 to 281A	*All sections save for section 278 which* is	Section 278 if so deemed by

			specified as being a function which can be an executive function but need not be	Authority
	Part XIV (Miscellaneous)	Ss 282 to 345	*All sections*	
Road Traffic Regulation Act 1984	All parts	All sections	*All sections*	

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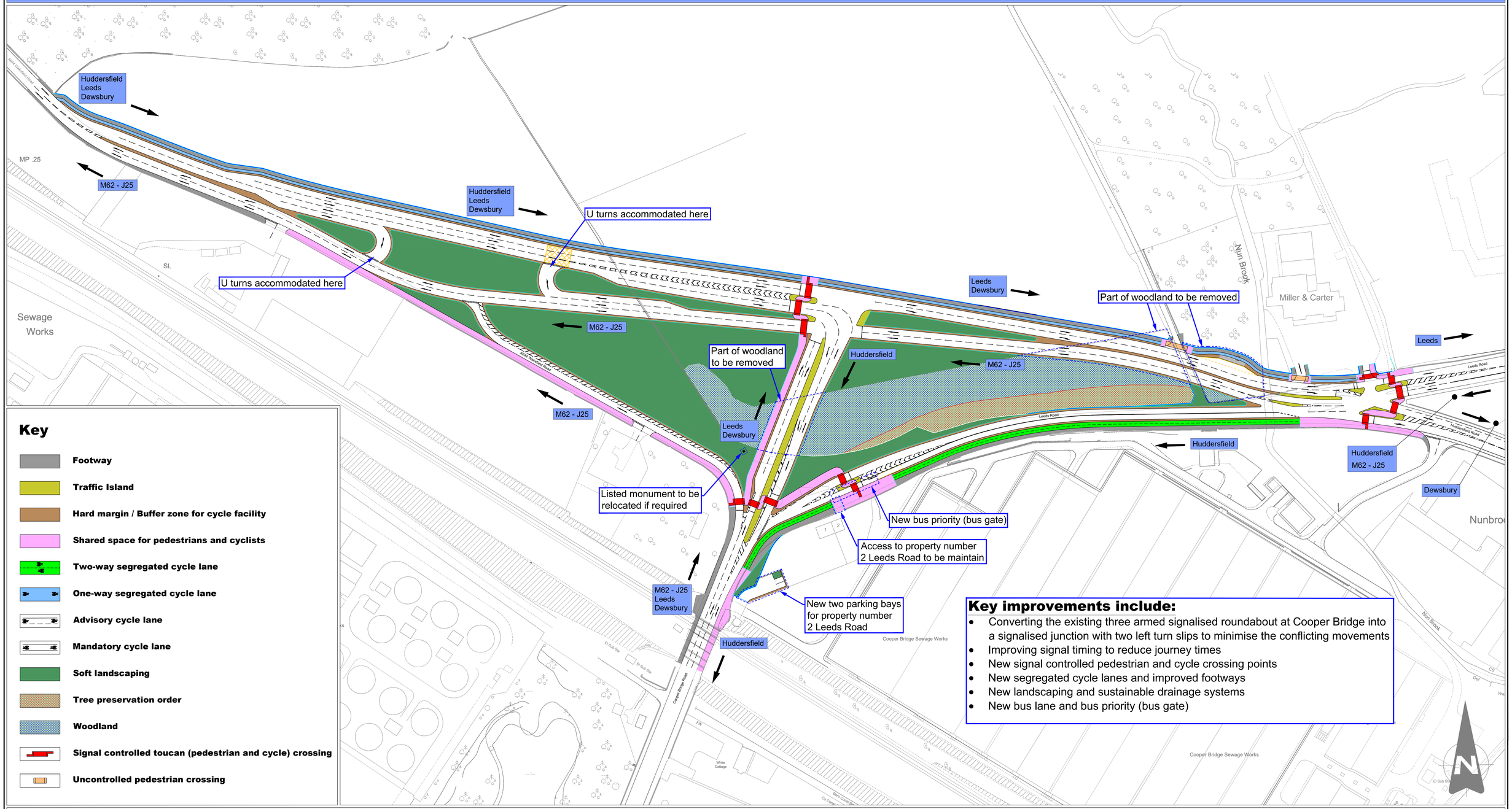
A62 - A644 Cooper Bridge Junction Improvement Scheme
Option - C (T - Junction Layout)



Key

- Footway
- Traffic Island
- Hard margin / Buffer zone for cycle facility
- Shared space for pedestrians and cyclists
- Two-way segregated cycle lane
- One-way segregated cycle lane
- Advisory cycle lane
- Mandatory cycle lane
- Soft landscaping
- Tree preservation order
- Woodland
- Signal controlled toucan (pedestrian and cycle) crossing
- Uncontrolled pedestrian crossing

Key improvements include:

- Converting the existing three armed signalised roundabout at Cooper Bridge into a signalised junction with two left turn slips to minimise the conflicting movements
- Improving signal timing to reduce journey times
- New signal controlled pedestrian and cycle crossing points
- New segregated cycle lanes and improved footways
- New landscaping and sustainable drainage systems
- New bus lane and bus priority (bus gate)

Developed and supported by:

Kirklees COUNCIL

West Yorkshire Combined Authority | Tracy Brabin Mayor of West Yorkshire

Calderdale Council

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Name of meeting: Cabinet
Date: 23 January 2023
Title of report:

Kirklees Major Transport Schemes; West Yorkshire Transport Fund (WYTF) and City Region Sustainable Transport Settlement (CRSTS) Programmes

Purpose of report:

- To report progress on the delivery of the West Yorkshire Transport Fund (WYTF) and City Region Sustainable Transport Settlement (CRSTS) Programmes in Kirklees;
- To set out a new funding strategy and request a reprofiling of the West Yorkshire Transport Fund (WYTF) Programme in order to ensure schemes remain deliverable; and
- To seek the necessary Delegated Authorities to progress the schemes as set out in this report.

Key Decision – A key decision is an executive decision to be made by Cabinet which is likely to result in Council spending or saving £500k or more per annum, or to have a significant positive or negative effect on communities living or working in an area compromising two or more electoral wards. Decisions having a particularly significant effect on a single ward may also be treated as if they were key decisions.	Yes **If yes give the reason why** It involves a decision that will result in the Council spending over £500K and will effect more than 2 wards.
Key Decision - Is it in the Council's Forward Plan (key decisions and private reports)?	**Key Decision** Yes **Private Report/Private Appendix** No
The Decision - Is it eligible for call in by Scrutiny?	Yes
Date signed off by Strategic Director & 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?**	David Shepherd 3rd January 2024 Isabel Brittain Julie Muscroft 3rd January 2024
Cabinet member portfolio	Cllr Moses Crook

Electoral wards affected:

- Ashbrow/Mirfield/Liversedge & Gomersal – A62 Cooper Bridge
- Mirfield, Dewsbury West & East, Batley East - Mirfield to Dewsbury to Leeds Corridor Scheme (M2D2L)
- Lindley/Greenhead – A629 Phase 5
- Crosland Moor & Netherton/Newsome – Huddersfield Southern Corridors
- Newsome – Huddersfield Station Gateway
- Holme Valley South – Holmfirth Town Centre Action Plan
- Ashbrow, Cleckheaton, Liversedge & Gomersal, Mirfield, Dalton, Heckmondwike, Dewsbury West, East & South, – North Kirklees Orbital Route scheme.
- Dalton/Newsome - A62 Smart Corridor
- Ashbrow – CityConnect Phase 3 – Bradley to Brighouse
- Newsome – CityConnect Phase 3 - Cross Church Street
- Newsome – Huddersfield Queensgate Ring Road

Ward councillors consulted: All Ward Councillors are consulted where schemes are being planned and at various points throughout a scheme's development.

Public or private: Public.

Has GDPR been considered? Yes.

1. Summary

- This report updates Cabinet on progress towards delivering major transport schemes contained within the West Yorkshire Transport Fund (WYTF) and City Region Sustainable Transport Settlement (CRSTS) Programmes.
- Very significant cost increases in recent years mean that it is no longer possible to deliver the programme as previously envisaged. Remedial action is therefore required to bring the programme back into affordability before decisions can be taken to progress individual projects into their final delivery contracts.
- This report sets out a new funding strategy and associated reprofiling request of the West Yorkshire Transport Fund (WYTF) Programme developed in discussion with the West Yorkshire Combined Authority (WYCA); and
- Seeks the Delegated Authorities needed to progress the schemes to delivery, as set out in this report.

2. Funding position

2.1 Summary of main funding streams

The Kirklees transport programme covers a wide range of activity, including;

- Promoting active travel (walking and cycling)
- Congestion relief; unlocking economic growth via interventions on the highway network
- Bus improvement, prioritisation and reform
- West Yorkshire Mass Transit
- Enabling major rail improvement (TransPennine Rail Upgrade and Penistone Line), and
- Supporting modal shift and decarbonisation

Delivery is supported by a range of different projects and funding sources, many of which are managed by the West Yorkshire Combined Authority (WYCA), with the Council acting as scheme promoter for delivery. These funding streams include;

- West Yorkshire Transport Fund (WYTF)
- City Region Sustainable Transport Settlement (CRSTS)
- Transforming Cities Fund (TCF)
- Active Travel Fund
- City Connect funding
- Kirklees Council capital
- Levelling Up Fund
- Third party investment e.g. Network Rail

This report focuses on decisions needed to progress delivery of the **West Yorkshire Transport Fund (WYTF)** and **City Region Sustainable Transport Settlement (CRSTS) / Transforming Cities Fund (TCF)** programmes in Kirklees.

The **West Yorkshire Transport Fund (WYTF)** is designed to facilitate long term economic growth and is funding made available to West Yorkshire from the Department for Transport. A number of strategic transport projects were originally put forward by Kirklees, often related to addressing key infrastructure constraints identified in the Local Plan. The WYTF is approaching the end of its life with many schemes delivered successfully across West Yorkshire. It's therefore imperative that Kirklees moves its remaining projects swiftly into delivery to ensure full advantage is taken of this funding opportunity.

The **City Regional Sustainable Transport Settlement (CRSTS)** is the most recent, multi-year, tranche of devolved transport funding to West Yorkshire, focussing on public and sustainable transport investment. The **Transforming Cities Fund (TCF)** was a devolved programme of transport infrastructure investment secured as part of the West Yorkshire Devolution Deal, designed to support more accessible, affordable and attractive green transport options; connecting people to economic and education opportunities and healthier communities for the future. The Transforming Cities Fund has since been incorporated into the City Regional Sustainable Transport Fund (CRSTS).

2.2. Kirklees WYTF and TCF/CRSTS Programme Overview

WYTF and TCF/CRSTS are funding a number of critical infrastructure projects across Kirklees. The scale of the delivery programme is very significant.

Summary positions of the schemes being progressed is provided in **Appendix 1**. It summarises key achievements and milestones towards completion, such as:

- Land/asset secured
- Consultations completed or planned
- Demolitions undertaken
- Planning permissions granted
- Detailed design and tender documents status,
- Forecast financial outturn

2.3 Previous Programme Reviews

In the last few years, all capital programmes have come under significant strain with very high inflation on materials and significant instability in the construction sector.

As a result, an 'inflation review' was instigated in West Yorkshire in late 2021 which led to a decisions at the WYCA Place & Regeneration Committee on 8th March 2022. The outcome of the review paused a number of schemes across all parts of West Yorkshire.

The impacts for Kirklees at that time were as follows:

Scheme	Details	Inflation Review outcome
Mirfield to Dewsbury to Leeds Corridor Scheme (M2D2L)	Cross boundary walking and cycling scheme between Kirklees and Leeds between Mirfield and Leeds via Dewsbury.	Pause at Full Business Case stage.

A629 Phase 4	Part of a wider package of schemes along the A629 corridor between Halifax and Huddersfield designed to speed up public transport and car journeys along the route, unlock key development sites and deliver improved facilities for cycling and walking. • Phase 1: Jubilee Road to Shaw Hill and Elland Wood Bottom to Salterhebble Hill (Calderdale). • Phase 2: Halifax Town Centre (Calderdale) • Phase 3: Free School Lane into Halifax (Calderdale) • Phase 4: Cycling, walking and public transport interventions (joint Kirklees/Calderdale). • Phase 5: Ainley Top into Huddersfield (Kirklees) (see below).	Paused (Phase 4)
A629 Phase 5	Corridor scheme between Ainley Top and Huddersfield designed to speed up public transport and car journeys along the route, unlock key development sites and deliver improved facilities for cycling and walking. Planned measures include highway widening, remodelling junctions and signals, and improved public transport including improvement to cycling and walking infrastructure, at the following junctions: • Ainley Top • Prince Royd • Cavalry Arms • Blacker Road (removed)	Blacker Road element removed. Remainder of the scheme to proceed.
A629 Wakefield Road Sustainable Transport Corridor	The A629 Wakefield Road corridor stretches for approximately 3 kilometres from Shorehead Roundabout, southeast of Huddersfield town centre to the A629/ A642 Waterloo junction in Waterloo. The objectives of the project are to improved pedestrian environments; provide continuous high standard cycle facilities; improve access to bus services; improve safety on the highway for all users; improve air quality and improve reliability for cars along the corridor.	Pause at Outline Business Case stage
Huddersfield Station Gateway	Huddersfield Station Gateway will complement live investment in the Transpennine Route Upgrade (TRU) between Manchester and York. The Station Gateway project seek to maximise the benefits of this investment for Huddersfield, by helping to regenerate the area around the town's railway station. A revised masterplan document will be prepared to help develop the Outline Business Case.	Develop revised masterplan and then pause at Outline Business Case stage
City Connect Phase 3 – Bradley to Brighouse	Walking and cycling scheme between Bradley and Brighouse	Paused

City Connect Phase 3 - Cross Church Street	Pedestrianisation and creation of key active travel route providing links to employment and education establishments, the town centre and to other parts of the wider active travel network.	Paused
North Kirklees Orbital Route	This project formed part of a package of longer-term transformational projects with funding only allocated to develop a Strategic Outline Case for a new link road within North Kirklees. The scheme was stopped at this point.	Stopped
Huddersfield Southern Corridors	A package of junction improvements designed to improve safety and traffic flows for highway users and active travel (walking and cycling) • Longroyd • Lockwood • Queensgate • Folly Hall (delivered)	Queensgate element removed. Remainder of the scheme to proceed.

This resulted in £22.3 million of previously allocated WYTF funds to Kirklees being returned to WYCA to be reallocated to other schemes. All districts within West Yorkshire were subject to the inflation review process, with each returning significant sums or being subject to reprofiling. Paused schemes now effectively become pipeline schemes for the future. No decisions about these previously paused schemes are being sought.

2.4 Current Funding Gaps

The nature and scale of the infrastructure projects being delivered mean that they are developed over a number of years. The original budget envelopes for WYTF and TCF/CRSTS scheme were set several years ago, some as far back as 2014. Whilst some allocations have been amended via subsequent approvals ('Change Requests') to WYCA and the 2021/22 Inflation Review referenced above, many of the projects have retained their original allocations.

Against this position many projects have taken longer to develop than originally envisaged due to factors such as land negotiations, staff turnover, securing resources in a challenging market, compliance with the necessary consents/approvals needed, scope change to meet stakeholder expectations, changes in policy and design guidance, the impact of Covid and then rapid inflation. The combined effect of all of these factors mean than in most cases, the budgets are no longer sufficient to deliver the scheme objectives in today's construction market.

During this period the Council's own financial position has also worsened considerably as a result of many of the very same factors. The Council had originally committed to underwrite a total of £12.93m of funding towards the WYTF Transport programme. To date, the Council has contributed c£6.52m of that funding. Given the Council's overall financial position, it is now no longer possible to make any future contributions and £6.4m of the remaining Council capital contribution has been removed from the WYTF programme during 2023. This means there is then a further gap on project budgets.

There has been no proposal to remove Council match funding from the TCF/CRSTS projects.

The collective impacts of these factors means that the WYTF and TCF/CRSTS programmes now have considerable funding gaps that need addressing before individual projects can proceed.

The current financial position for the remaining WYTF schemes is set out in Table 1.

The current financial position for the TCF/CRSTS schemes that have funding gaps is set out in Table 2.

Table 1 - Kirklees WYTF Programme Funding Forecast Gap – current summary position

Project	Total Current Funding	Removal of Council Contribution	Forecast Cost	Forecast Funding Gap (B – D)
A	B	C	D	E
A62 to Cooper Bridge (full scheme)	£75,100,000	£0	£94,000,000	**-£18,900,000**
M2D2L (Mirfield to Dewsbury to Leeds)	£1,335,000	£0	£1,345,000	**-£10,000**
A629 Halifax Road Phase 5	£10,621,347	£836,896	£13,876,870	**-£3,255,523**
Huddersfield Southern Corridors	£11,845,264	£280,386	£13,617,159	**-£1,771,895**
North Kirklees Orbital Route	£248,000	£0	£283,409	**-£35,409**
Holmfirth Town Centre Action Plan	£5,409,889	£2,063,932	£14,606,494	**-£9,196,605**
A62 Smart Corridor	£13,934,504	£3,110,033	£21,000,000	**-£7,065,496**
CityConnect Phase 3 - Huddersfield town centre	£544,568	£60,189	£646,901	**-£102,333**
A629 Wakefield Road	£1,300,000	£0	£1,450,000*	**-£150,000**
Land acquisition fund	0.00	£55,362	£0	£0
	£120,338,572	**£6,406,798**	**£160,825,833**	**-£40,487,261**

** Includes the £700K in TCF A629 Wakefield Rd Scheme, Table 2*

Table 2 - Kirklees TCF/CRSTS Programme Funding Forecast Gap – current summary position

Title	Indicative WYCA Funding	Council Borrowing (Match)	Total Funding	Forecast Cost	Funding Gap (D-E)
A	B	C	D	E	
Heckmondwike Bus Station	8,666,152	0.00	8,666,152	8,666,152	**£ 0.00**
Dewsbury/Cleckheaton Sustainable Travel Corridor	15,799,000	0.00	15,799,000	15,799,000	**£ 0.00**
Dewsbury Town Centre Walking & Cycling	10,250,000	1,500,000	11,750,000	12,250,000	**-£ 500,000**
Huddersfield Rail Station Connections	13,000,000	3,000,000	16,000,000	18,702,477	**-£ 2,702,477**
A629 Wakefield Rd Sustainable Travel Corridor	700,000	0.00	700,000	700,000	**£ 0.00**
Huddersfield Bus Station	6,449,000	1,000,000	7,449,000	7,449,000	**£ 0.00**
Dewsbury/Batley/Chidswell Sustainable Travel Corridor	6,000,000	500,000	6,500,000	9,992,299	**-£ 3,492,299**
Huddersfield Rail Station Access	1,735,000	451,643	2,186,643	2,257,000	**-£ 70,357**
Dewsbury Rail Station Access	160,000	0.00	160,000	161,000	**-£ 1,000**
Totals	**62,759,152**	**6,451,643**	**69,184,152**	**75,976,928**	**-£ 6,766,133**

2.5 Proposed Funding Strategy; WYTF Programme

The strategy to address the funding gaps on Kirklees WYTF programme primarily centres around phasing of Cooper Bridge scheme. The current estimate for the Cooper Bridge scheme is estimated at £94m which exceeds the current funding allocation. A phased approach has therefore been explored. This would reduce the current funding requirement and, with WYCA's agreement, allow the balance of funds to be redistributed to other schemes within Kirklees that have funding gaps.

The most logical way of phasing delivery of the Cooper Bridge scheme would be to make Phase 1 the Coper Bridge roundabout element only. Subsequent phases could then look to address widening under the rail bridge and improvements to Bradley junction at a later date if traffic modelling demonstrated the need still existed and other funding sources were available. Delivery of strategically important housing sites in the local area will continue to be facilitated by delivery of Phase 1 of the Cooper Bridge project.

It is currently estimated that a meaningful intervention at Cooper Bridge roundabout as a first phase would cost approximately £53m and the scheme currently has £75.1 of funding allocated.

It is important to note the figures above are forecast estimates, based on the best information available at this time. Whilst forecast budgets include sums for risk and

contingencies, it must be recognised that given the volatility of construction prices, these forecast costs could increase.

A summary of Cooper Bridge Phase 1 is included at Appendix 2. Detailed traffic modelling required to assess the business case for this scheme and impacts on things like bus journey times is currently underway to fully understand its implications and benefits therefore, the layout is indicative and is subject to change to meet stakeholder requirements. Discussion on this will continue with the West Yorkshire Combined Authority through their normal quality assurance procedures.

These proposals have been discussed at length with WYCA and are going through their assurance and decision-making processes. In order to support the proposed phasing of Cooper Bridge and re-allocation of funding to other projects, WYCA have highlighted that they will be unlikely to support further increases to budgets in later years. Furthermore, WYCA highlight that a new Outline Business Case for Phase 1 of Cooper Bridge will need to be submitted and appraised. The scheme will need to demonstrate a positive business case, bus benefits and promotion of active travel if it is to be successful.

This report therefore asks Members to agree the phasing of Cooper Bridge scheme, with Phase 1 to focus on the Cooper Bridge roundabout only, and to seek agreement from WYCA to redistribution the subsequent saving of around £21.6million of external funding to support funding gaps on the other WYTF schemes (see Table 3).

Table 3 - Proposed Indicative allocations for each WYTF project with a phased Cooper Bridge

Project & Assurance Stage	Current WYCA only funding allocation	Forecast Cost	Funding Gap (all sources of funding considered)	Proposed Indicative WYCA Funding	Reprofiled from A62 Cooper Bridge	Overall WYCA funding change
A	**B**	**C**	**D**	**E**	**F**	**G**
A62 to Cooper Bridge- Phase 1	£75,100,000	£53,512,739	0	£53,512,739		-£21,587,261
M2D2L (Mirfield to Dewsbury to Leeds)	£1,335,000	£1,345,000	£10,000	£1,345,000	£10,000	£10,000
A629 Halifax Road Phase 5	£10,546,347	£13,876,870	£3,255,523	£13,801,870	£3,255,523	£3,255,523
Huddersfield Southern Corridors (excl Queensgate)	£10,315,765	£13,617,159	£1,771,895	£12,087,660	£1,771,895	£1,771,895
North Kirklees Orbital Route (OBC - stopped)	£248,000	£283,409	£35,409	£283,409	£35,409	£35,409
Holmfirth Town Centre Action Plan	£5,173,821	£14,606,494	£9,196,605	£14,370,426	£9,196,605	£9,196,605
A62 Smart Corridor (Defects maintenance period)	£8,350,000	£21,000,000	£7,065,496	£15,415,496	£7,065,496	£7,065,496

CityConnect Ph3 - Huddersfield town centre (OBC-Paused)	£180,000	£646,901	£102,333	£282,333	£102,333	£102,333
A629 Fenay Lane	£600,000	£1,450,000	£150,000	£750,000	£150,000	£150,000
	£111,848,933	**£120,338,572**	**£21,587,261**	**£111,848,933**	**£21,587,261**	**£0.00**

** Plus other (non-WYCA) funding sources brings total funding to £120,338,010*

2.6 Proposed Funding Strategy for TCF/CRSTS Programme

The funding shortfall on the TCF/CRSTS schemes is less significant in overall terms and it is hoped these can be addressed through the WYCA Quality Assurance process. This means either receiving additional funding from TCF/CRSTS reserves held by WYCA (unlike WYTF where there are no such reserves) or to progress with 'do minimum' options identified in the business planning process which will make the overall programme affordable and deliverable.

We continue to work closely with colleagues at WYCA who are aware of the financial position of the Council's budget challenges. There is no proposal to remove Council match or reprofile funding away from other TCF/CRSTS projects at this time.

2.7 Delivery; approvals sought

2.7.1 Holmfirth Town Centre Action Plan

As part of the Holmfirth Blueprint, the proposed Holmfirth Town Centre Access Plan project aims to support economic growth through investment in the public realm and improvements at key junctions. The package of measures includes upgrading of existing signal-controlled junctions, widening of footways, improvements to pedestrian crossings, inclusion of Electric Vehicle charging points, improvements to the public realm, improvements to bus stop facilities, improvements to car parks and introduction of 20mph areas in the town.

On 5th July 2022 the Cabinet gave authority for the full business case (FBC) to be submitted to West Yorkshire Combined Authority (WYCA), authorised scheme delivery and acceptance of further grant funding from WYCA. Cabinet authorised all requests with a condition highlighting a '*spending tolerance of circa 15% (£1,129,130) of forecast cost (£7,473,821) to be funded through the Council's capital plan*'.

Final tender costs received in 2023 were outside this tolerance and therefore the final contract has not been let to construct the scheme. Instead, a re-procurement exercise is underway and, subject to confirmation of the overall funding strategy and reprofile from WYCA outlined above, the intention would be to let a new contract for delivery of the Holmfirth scheme in mid-2024.

Cabinet is requested to note the changes to the project, authorise submission of any necessary business case to the West Yorkshire Combined Authority (WYCA) to secure

additional funding, and to seek delegated authority to the Strategic Director of Growth & Regeneration and to the Service Director Legal, Governance and Commissioning to award contracts to facilitate delivery and to enter into any funding agreements.

2.7.2 Huddersfield Southern Corridors

The Huddersfield Southern Corridors Project comprised a package of highway and active travel improvements on the A62 and A616 corridors in southern parts of Huddersfield. This includes improvements at Longroyd Lane, Lockwood Bar, Queensgate and Folly Hall. The latter of which has now been built out and is open to the public.

On 30th April 2023 a Change Request to WYCA was approved which highlighted an indicative funding of £8.7m of West Yorkshire Transport Fund funding. The project also included £3.25m of Kirklees Capital Funding at that time however, following an inflation review it was decided to pause the Queensgate element of the package to bring costs back in line. Kirklees Capital funding was also reduced to £1.530m. This has left a funding shortfall of £1.77m (see Table 1).

This report requests Cabinet notes the changes to the project, authorise the submission of any necessary business case to the West Yorkshire Combined Authority (WYCA) to secure funding, and to seek delegated authority to the Strategic Director of Growth & Regeneration and to the Service Director Legal, Governance and Commissioning to award contracts to facilitate delivery and to enter into any funding agreements.

3. Implications for the Council

3.1 Working with People

Collaborating with partners is key to ensuring the Council get the best outcomes for citizens, communities, and Kirklees as a whole. As part of the transport programme considerable engagement through public events has been undertaken including promotion through our social media channels.

This process will continue as projects move through the development phases. Further engagement with businesses and town centre users will be required as the schemes get developed in more detail. This should help shape the projects.

3.2 Working with Partners

The Council has engaged with landowners, businesses and stakeholders during development of the projects. This will continue as individual project proposals are worked up.

3.3 Place Based Working

All our projects with are developed with the communities and local Councillors to ensure we get the best outcomes for the residents. The development of our projects are influenced and shaped by the Blueprints in the towns/villages where we have a scheme. There remains a close coordination with our Blueprint colleagues to ensure our projects works are and remain aligned.

3.4 Climate Change and Air Quality

Both climate change and air quality will be considerations through the development phases of projects moving forward, informing the planning processes and the future detailed design work. The schemes ensure promotion of better connectivity through the area and to surrounding communities particularly using active travel to contribute to reducing adverse transport derived impacts on communities and improve public health.

3.5 Improving outcomes for children

The design approach seeks to create more safe environments for all. Our streets and spaces will be designed with all generations in mind making them both safe and inclusive at the same time by improving crossing facilities for walker and cyclists and seek speed reducing measures where appropriate to strategic location like schools and play areas.

3.6 Financial Implications for the people living or working in Kirklees

None.

3.7 Other (eg Integrated Impact Assessment/Legal/Financial or Human Resources)

All projects where required undergo an Integrated Impact Assessment and are reviewed by our corporate policy colleagues. This ensures we maintain a high consistent standard and our schemes align with the Council's wider strategies on inclusion, diversity, inclusion and on our environmental/climate strategies. The Council has the power to enter into funding agreements with the West Yorkshire Combined Authority; together with the statutory powers to carry out the projects referred to in this report. The Council will comply with its' Financial Procedure Rules, Contract Procedure Rules and the Public Contracts Regulations.

4 Consultation

Consultation is a key part of the development of these projects and will continue through various stages as part of our quality assurance process. Project specific consultation activities will be detailed in subsequent cabinet reports for each scheme.

5 Engagement

Engagement is a key part of the development of these projects and will continue through various stages as part of our quality assurance process. Project specific activities will be detailed in subsequent cabinet reports for each scheme.

6 Risk

WYCA have made clear throughout discussions about the proposed reprofiling of WYTF monies that they are unlikely to be able to support any future changes or requests for additional funding. Revised funding allocations for projects are therefore likely to be final. Given the stage of the projects, the cost information is based on estimates. This inserts an inevitable development risk that costs increase without an identified source of funding for it.

To mitigate this risk, each project budget contains an industry standard element for risk and contingency. With limited prospect of additional funding from either WYCA or the Council, should these contingency sums not be sufficient, the consequence is that scope may need to be reduced in response to any future cost increases in order for projects to remain within budgets, or that the projects themselves do not pass Full Business Case approval and therefore do not proceed should they no longer demonstrate value for money.

At the point of awarding construction contracts, the schemes will pass the Approval to Proceed process to confirm tender prices are within secured funding envelopes and can still demonstrate value for money for them to proceed. This will mitigate financial risk but will not remove it altogether.

7 Next steps and timelines

Officers to continue in progress the projects as set out in this report in accordance internal and WYCA quality assurance processes. Where individual projects require Cabinet Decisions they will be brought separately to Cabinet for decision.

Cabinet authority is sought to formally receive grant funding and incur expenditure in line with this report and the grant funding rules to progress each project.

8 Officer recommendations and reasons

Cabinet is requested to:

8.1 Note the update on the projects highlighted in the report including the outcomes of the previous inflation review set out in 2.3.

8.2 Approve the phasing Cooper Bridge and to request from WYCA the virement of £21.6m allocated for Cooper Bridge scheme to other WYTF Kirklees schemes as noted in this report. This will allow key transport infrastructure works to progress to bring much-needed improvements more widely across the district.

8.3 To note that a Phase 1 Cooper Bridge scheme with a significantly reduced budget of £53.5m will need to achieve a satisfactory business case for it to proceed.

8.4 Note changes to the Holmfirth Town Centre project at paragraph 2.7.1 of this report, to support the submission of any necessary business case to the West Yorkshire Combined Authority (WYCA) to secure funding, and to delegate authority to the Strategic Director of Growth & Regeneration to award contracts to facilitate delivery on Holmfirth Town Centre Action Plan once all funding has been secured.

8.5 Note changes to the Huddersfield Southern Corridors project at paragraph 2.7.2 of this report, to support the submission of any necessary business case(s) to the West Yorkshire Combined Authority (WYCA) to secure funding, and to delegate authority to the Strategic Director of Growth & Regeneration award contracts to facilitate delivery on Huddersfield Southern Corridors project once all funding has been secured.

8.6 Delegate authority to the Service Director Legal, Governance and Commissioning to enter into any funding agreements and ancillary contracts on the Council's behalf with West Yorkshire Combined Authority that is referred to in 2.5.1 and 2.5.2.

9 Cabinet Portfolio Holder's recommendations

The Cabinet Portfolio Holder recommends that Cabinet accepts and endorses the officer recommendation stated in paragraph 8.1 to 8.6.

10 Contact officer

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11 Background Papers and History of Decisions

Appendix 1 – Summary Project Status (Live Schemes)
Appendix 2 – Cooper Bridge Phase 1 (concept layout)

Cabinet Report – 19 December 2017 WY + Transport Fund Scheme update
Cabinet Report – 18 September 2018 Huddersfield Town Centre Works
Cabinet Report – 16 October 2018 A629 Phase 5 scheme approval/CPO
Cabinet Report – 13 November 2018 WY plus Transport Fund Scheme update
Cabinet Report - 26 May 2020 HSC Scheme Approval/Land Acquisition
Cabinet Report – 28 July 2023 Transport Major Scheme Approvals/Update
Cabinet Report – 01 September 2020 Transforming Cities Fund Programme
Cabinet Report – 22 June 2021 Kirklees Active Travel Fund (Tranche 2)
Cabinet Report – 22 June 2021 Huddersfield Station Gateway/Trinity St. Access
Cabinet Report – 12 October 2021 A62 Cooper Bridge Improvement Scheme
Cabinet Report – 16 November 2021 A62 Cooper Bridge Call In/Additional Information
Cabinet Report – 05 July 2022 Holmfirth Town Centre Access Plan.

12 Service Director responsible

Edward Highfield – Service Director, Skills and Regeneration

Report title: Development of land at Gasworks Street – West Yorkshire Investment Zone

Meeting	**Cabinet**
Date	**24 March 2026**
Cabinet Member	**Cllr Graham Turner**
Key Decision **Eligible for Call In**	**Yes** **Yes**

Purpose of Report

The Council-owned site at Gasworks Street, Huddersfield, which lies opposite the University of Huddersfield's National Health Innovation Campus (NHIC), forms an integral part of the West Yorkshire Investment Zone (IZ). The Council plans to bring forward the site for high quality employment uses with a focus on health and life sciences businesses that wish to locate in close proximity to the NHIC to access the University's research and innovation expertise. IZ funding of up to £8.55m has been allocated, subject to approval of outline and full business cases, to de-risk the site for future development.

The report updates Cabinet on progress in the development of the masterplan for the site; seeks approval for the submission of the Outline Business Case (OBC) to the West Yorkshire Combined Authority (WYCA) and to commence the process to select a private sector development partner to deliver the successful development of the site.

Recommendations

It is recommended that Cabinet

- notes the content of this report and approves the draft masterplan and OBC for the project
- agrees to accept further funding of up to £1m from WYCA as part of the overall capital allocation for the project to support further development of the project including detailed scheme design and full business case development and for the Council to act as Accountable Body for the grant (see 3.2 of the report)
- approves in principle the appointment of a private sector developer partner to progress delivery of the project
- delegates authority to the Executive Director for Place, in consultation with the Service Director Legal, Governance and Commissioning, to finalise the procurement strategy to appoint a developer partner, as set out in paragraph 2.36 of the report, for future approval by Cabinet including commencement of pre-market engagement and subsequent procurement stages

- delegates authority to the Executive Director for Place to finalise the masterplan and OBC for submission to WYCA and, subject to OBC approval, commence development of the RIBA Stage 3 design and full business case

- delegates authority to the Executive Director for Place, in consultation with the Service Director Legal, Governance and Commissioning, to agree all necessary legal agreements with the WYCA and for the Service Director Legal , Governance and Commissioning to enter into the aforementioned documentation on behalf of the Council

- delegates authority for implementation of the programme to the Executive Director for Place including the commencement and award of any related procurement exercises required to progress the project up to and including RIBA Stage 3, in accordance with the contract procedure rules and finance procedure rules and for the Service Director Legal , Governance and Commissioning to enter into the associated legal formalities and documentation on behalf of the Council.

Resource Implications: Responsibility for management of the Gasworks Street programme, including ensuring compliance with the grant funding agreement and submission of claims will continue to lie with the Council. Funding for the management and delivery of the programme is incorporated within the grant funding agreement with WYCA and is 100% funded by WYCA.	
Date signed off by <u>Executive Director</u> & name	**David Shepherd 13 March 2026**
Is it also signed off by the Service Director for Finance?	**Kevin Mulvaney 13 March 2026**
Is it also signed off by the Service Director for Legal Governance and Commissioning (Monitoring Officer)?	**Samantha Lawton 13 March 2026**

Electoral wards affected: Dalton

Ward councillors consulted: N/a

Public or private: Public

Has GDPR been considered? Yes

1. Executive Summary

The Council-owned site at Gasworks Street, Huddersfield, which lies opposite the University of Huddersfield's National Health Innovation Campus (NHIC and shown in Appendix 1, forms an integral part of the West Yorkshire Investment Zone. The Council plans to bring forward the site for high quality employment uses with a focus on health and life sciences and the attraction of businesses that wish to locate in close proximity to the NHIC to access the University's research and innovation expertise.

Along with the NHIC, the Gasworks Street site represents a unique opportunity to attract highly skilled, well paid jobs to the district and will complement and add value to the Council's wider regeneration programme for Huddersfield town centre. Investment Zone funding of up to £8.55m, including project development costs, has been awarded in principle subject to business case approval and was accepted by Cabinet in March 2024.

The report updates Cabinet on progress in the development of the masterplan for the site; seeks approval for the submission of the OBC to WYCA and to commence the process to select a private sector development partner to deliver the successful development of the site.

2. Information required to take a decision

Context: West Yorkshire's health and life science sectors

2.1 West Yorkshire is home to innovative and rapidly growing health and life science sectors, with future growth potential highlighted in both the Government's Life Sciences Sector Plan (part of the Industrial Strategy) and WYCA's HealthTech Cluster Plan. West Yorkshire's health innovation ecosystem is based on a unique concentration of NHS/clinical and research expertise and innovative SMEs alongside larger businesses, including one of the largest teaching hospitals in Europe.

2.2 West Yorkshire's acknowledged innovation clusters include digital health, medical devices, diagnostics and personalised healthcare, pharmaceuticals and drug discovery, medical services and hardware/consumables. Strengths in data science, software development and AI underpin these capabilities.

2.3 The opportunities for significant growth of the health and life sciences sector are also highlighted in the recently adopted Kirklees Inclusive Economy Strategy. Established manufacturing businesses including STADA Thornton and Ross (pharmaceuticals) and Syngenta (agribusiness/life sciences) sit alongside innovative, fast growing SMEs including Paxman Scalp Cooling and Orean Personal Care.

Context: West Yorkshire Investment Zone

2.4 The University of Huddersfield's National Health Innovation Campus, sited in the heart of the Station to Stadium Enterprise Corridor, is a key driver of the growth of the health and life sciences in Kirklees. The NHIC will create the largest and most dynamic centre for workforce transformation and health and social care innovation in the North of England, building on the University's world leading research and innovation expertise in areas including clinical diagnostics, skin integrity and infection prevention.

2.5 The NHIC and wider Station to Stadium Enterprise Corridor form a key part of the West Yorkshire Investment Zone, launched in 2024. IZ's aim to accelerate investment in sectors that are vital to the national Industrial Strategy, creating highly skilled jobs, unlocking business growth and attracting private investment linked to regional research and innovation capabilities.

2.6 Each IZ will benefit from a package of £160m of both capital and revenue over a ten-year period commencing in 2024. Huddersfield is one of three locations (with Leeds and Bradford) which form the IZ in West Yorkshire. In Huddersfield, the aim is to utilise IZ funding to curate a unique mix of research institutions, public health facilities and businesses seeking to co-locate alongside the NHIC to access its expertise and facilities.

2.7 The suite of Huddersfield IZ projects already approved by WYCA or at business case stage includes:

- construction and fit out of an 'innovation floor' of the Emily Siddon Building at the NHIC, providing lab space/office space for innovative health sector businesses;

- remediation and provision of site infrastructure for the Council-owned site at Gasworks Street, adjoining the NHIC, to provide a focus for health related manufacturing, research and other innovative businesses seeking to co-locate alongside the campus;

- investment to enhance the capacity of the local electricity supply network to de-risk future development within the Station to Stadium Corridor, this project is also at OBC stage;

- provision of a new footbridge over the Huddersfield Broad Canal, related footpath links to improve pedestrian connectivity between the NHIC and Gasworks Street sites this project is at OBC stage;

- the Huddersfield Health Innovation Incubator, approved by Cabinet in December 2025, which will create a wrap-around package of support for innovative health, wellbeing, and digital tech businesses seeking to start or scale up and will complement and add value to the suite of capital projects proposed for the Investment Zone.

Industrial property market context

2.8 Huddersfield has experienced a shortage of available industrial premises and in particular high quality modern accommodation, for a number of years. Analysis via the CoStar property database shows there is currently just 295,544 sq.ft of industrial/logistics floorspace available for let or sale in the Huddersfield market area, comprising 16 units ranging in size from 663-143,614 sq.ft. One large unit accounts for just over 48% of the available supply. From a quality perspective none of the units is rated above 3* (average) by CoStar and most are rated 2* (poor).

2.9 In contrast, the Business Kirklees team is currently managing enquiries from 20 businesses seeking manufacturing or logistics/warehousing space in Huddersfield with a total/aggregated demand for 677,498 sq.ft of floorspace and a further 14 seeking a location anywhere in Kirklees with a requirement for an additional 693,216 sq.ft. On this basis demand for industrial floorspace considerably exceeds the supply available in Huddersfield.

2.10 Despite this, with a handful of notable exceptions, the private sector is not bringing forward new industrial floorspace to meet identified demand as a result of viability considerations. The development at Park Valley Mills (2022) is the most recent private sector development of any scale in Huddersfield.

2.11 This market failure is also impacting the growth of the health and life sciences sectors both locally and regionally, with an acute lack of specialist laboratory space or advanced manufacturing facilities. This was highlighted in recent research for WYCA on health and life sciences real estate, including the potential market opportunity for Huddersfield linked to the NHIC and Investment Zone.

2.12 This report, by international real estate consultants CBRE (see Appendix 2), notes that investment remains concentrated in established hubs in Cambridge, Oxford and London. West Yorkshire is one of the UK's emerging health and life sciences clusters yet there is an acute shortage of available laboratory space and other specialist facilities, or accommodation in the development pipeline, which is constraining the future growth of the sector.

2.13 The Old Medical School in Leeds, to be redeveloped to create up to 75,000 sq.ft of innovation space by Scarborough Group International and the innovation floor within the Emily Siddon Building are the only current schemes in the pipeline. The proposed relocation by Paxman Scalp Coolers to the Turnbridge Mills complex off Old Leeds Road – with significant IZ grant funding approved by WYCA to facilitate the project – highlights the viability challenge facing developers/investors in seeking to bring forward new floorspace to meet occupier demand.

2.14 Whilst acknowledging market failure, especially outside Leeds, the research highlights the need to provide a range of specialist lab facilities, including both 'wet' and 'dry' labs which house different types of research/experimentation, Containment Level 2 facilities which provide higher levels of containment for potentially hazardous biological agents; and flexible 'TechBox' spaces for MedTech businesses which integrate research, lab space and advanced manufacturing facilities within the same premises.

2.15 Building on the incubators established in Leeds, Bradford and Huddersfield, the research also identifies the need for more 'grow-on' space to support the growth and expansion of start-ups. Huddersfield is particularly well placed to provide additional, high quality employment sites in close proximity to both the University and town centre facilities and amenities, including urban living opportunities.

2.16 The presence of market failures both in the wider industrial property market and for the health/life sciences sectors reinforce the need for intervention through public land ownership and the availability of grant support, through the Investment Zone programme, to de-risk development. These measures are necessary to deliver the types of spaces required by progressive occupiers in the health and life sciences sector.

Overview Gasworks Street site

2.17 The Gasworks Street site extends to 6.8 acres (2.75 hectares) and lies between the Huddersfield Broad Canal and St Andrews Road to the east of Huddersfield Town Centre. The site formerly housed a number of gasholders which were removed many years ago and was subject to partial remediation by its former owners in the early 2000s.

2.18 The site was purchased by Kirklees Stadium Development Ltd (KSDL) as part of previous proposals to develop the land adjoining the (now Accu-sponsored) Stadium. Ownership was transferred to the Council in September 2025 as part of the share transfer and financial settlement agreement with other shareholders of Kirklees Stadium Development Limited).

2.19 The site was identified as a strategic opportunity to increase the supply of high quality employment land in the Station to Stadium Enterprise Corridor Masterplan which was approved by Cabinet in December 2022. The site, located in close proximity to the then emerging NHIC, Huddersfield Town Centre and Leeds Road was earmarked for development of over 17,000 square metres of advanced manufacturing floorspace.

2.20 The site is subject to contamination as a result of its former use for gas storage and distribution including petroleum and polyaromatic hydrocarbons. Substantial volumes of made ground are also present including asbestos and other sources of contamination. The site was subject to a degree of remediation by its former owners prior to disposal to KSDL. A range of desk-based geo-technical studies have been undertaken in relation to ground conditions and contamination with further site investigations planned as part of the next phase of project development work. When works commence on site these will be subject to extensive air quality monitoring and other proactive measures to ensure the safe and effective management of any contaminants.

Draft masterplan

2.21 WYCA has allocated IZ grant funding to implement site remediation and infrastructure works for the Gasworks Street site up to a total of £8.55m and subject to approval of outline and full business cases for the project. These works will de-risk the development of the site for, and enhance its attractiveness to, prospective developers of the site.

2.22 WYCA has provided initial development funding of £985,000 (part of the £8.55m overall allocation) to progress master planning, geotechnical and other assessments, site remediation and infrastructure design and the business case preparation. A consultant team has been appointed through the Council's Strategic Delivery Partner, Turner & Townsend, to progress this work, including the preparation of a flexible masterplan to guide the future development of the site.

2.23 The master-planning and related activity has reached RIBA Work Stage 2. The objectives of the draft masterplan for Gasworks Street are to:

- support the creation of high-value employment opportunities, especially in health innovation, life sciences, advanced manufacturing, research & development, and digital/tech sectors;

- improve pedestrian and vehicle connectivity and accessibility, capitalising on improved transport links (notably upgrades to Huddersfield Railway Station under the TransPennine Route Upgrade), and promoting walking, cycling, and better pedestrian/active-travel routes from the town centre and along the Station to Stadium Corridor; and

- deliver a high-quality urban environment combining a high quality built environment, green spaces, sustainable design, public-realm improvements to create a vibrant, mixed-use development on the edge of the town centre.

2.24 The draft masterplan incorporates a mix of advanced manufacturing and research and development floorspace, potentially including provision of the hybrid 'TechBox' format which increasingly forms part of health/life science-focused developments in the Oxford-Cambridge Growth Corridor. The mix of units illustrated in the masterplan will deliver just over 211,000 sq.ft of new floorspace with the capacity to accommodate between 550-1,000 gross FTE jobs. The masterplan is inherently flexible and the floorspace and mix of uses can be reconfigured to meet the requirement of developers/occupiers.

2.25 The proposed layout is centred on a corridor of green space/public realm from the south-west to the north-east of the site. This will not only create a high-quality setting for the development but will also, in due course, provide a new connection for pedestrians and cyclists between the station/town centre and Accu Stadium. It is proposed that this will be facilitated by the construction of a new pedestrian footbridge over the Huddersfield Broad Canal, physically connecting the NHIC and Gasworks Street sites to support collaboration between businesses, researchers and clinicians operating on both sites that will ultimately be a key measure of the establishment of a successful health/life sciences cluster. The management in perpetuity of the public realm created by the scheme will be fully incorporated into any future development agreement.

2.26 Development is mainly located along St Andrews Road and Gasworks Street to create strong street frontages and incorporates a mix of one and two storey buildings. Vehicular access is proposed via St Andrews Road with separate access for pedestrians and cyclists along both St Andrews Road and Gasworks Street to optimise the permeability of the site. A large multi-storey car park (MSCP) is also incorporated within the scheme to address the parking requirements of the proposed development and include some provision to meet wider parking needs in the area. The MSCP will also incorporate an active travel hub.

2.27 It is anticipated that the final version of the masterplan, developed to RIBA Stage 3, will form the basis for a hybrid approach to the submission of planning applications by the Council for the Gasworks Street, involving:

- a full planning application for the remediation works on completion of detailed design work and approval of the final business case (FBC); and

- an outline application for a mix of office (Use class E(g)(i)) Research & Development (E(g)(ii)), Industrial Process (E(g)(iii)), and/or General industrial (B2) uses to optimise the flexibility to adjust the mix of land uses to meet future developer/occupier requirements, with most detailed matters reserved.

2.28 The planning strategy is closely aligned with the proposed approach to the delivery of the site to market. It will facilitate an early start on site, demonstrates the Council's commitment to prospective developer partners, and will mitigate future delays caused by design development and additional requirements. Pre-application discussions with the Council's Planning team are planned during the next stage of design development to RIBA Stage 3.

Outline Business Case

2.29 An OBC, based on the draft masterplan and proposed site remediation and infrastructure works, has been prepared in draft. The OBC is the second stage of the business case process outlined by the HM Treasury Green Book and builds on the programme-level IZ Strategic Outline Case that was approved by WYCA in March 2024.

2.30 The OBC confirms the scope of the preferred option for preparing the site for redevelopment, including the remediation strategy, utilities provision and enabling works required to de-risk the attraction of a commercial development partner and also outlines project costs and delivery arrangements. The OBC is required to unlock the next phase of project development funding by WYCA for the project. The key findings include:

- the *Strategic Case* highlights strong national, regional and local policy alignment, particularly with IZ objectives to grow HealthTech and Digital Tech sectors; in addition, the Gasworks Street site is identified as a priority within the Station to Stadium Enterprise Corridor and can complement and add value to the NHIC by creating high-value commercial, Research & Development and advanced manufacturing space, attracting businesses to the area.

- the *Economic Case* considers a range of options to deliver development of the site ranging from 'do nothing' to the full masterplan scheme outlined in the RIBA Stage 2 report; the latter generates the highest adjusted Benefit-Cost Ratio of 2.16, meaning that the preferred option provides good overall value for money; sensitivity tests confirm value for money is resilient under most scenarios, though dependent on long-term occupancy of the spaces by the target occupiers e.g. health/life science businesses.

- the *Commercial Case* details the procurement strategy that has been developed for the remediation works and other key workstreams required to deliver the project; more detail will be presented in the Full Business Case.

- the *Financial Case* confirms that the proposed programme of site remediation and related works can be delivered within the budget of £8.55m, including site clearance, ground works, cut and fill, removal of hazardous materials, and diversion of the remaining overhead gas main.

- the *Management Case* outlines the proposed delivery arrangements for the project including programme and milestones, governance and assurance arrangements and benefits realisation plan.

2.31 Following finalisation and approval by the Council, the OBC will be submitted to WYCA for appraisal. It is anticipated that the OBC will be considered by WYCA Committee in June 2026. Approval of the OBC will unlock additional funding to enable further development of the scheme design (up to RIBA Work Stage 4) and the remediation works package.

Procurement of a delivery partner

2.32 As noted elsewhere in the report IZ funding of £8.55m has been secured in principle to complete the remediation of the Gasworks Street site and undertake further works to de-risk its future development. Further IZ funding has been earmarked to enhance the capacity of the electricity supply network in the Station to Stadium Corridor and to support provision of a new footbridge over the canal.

2.33 The proposed works to the Gasworks Street site and environs will both de-risk and accelerate its delivery but will not in their own right facilitate the development of the site and the provision of the new, high quality advanced manufacturing/Research & Development floorspace required to tackle the significant under-supply of space at both regional and local levels highlighted earlier in the report.

2.34 As owner of the land at Gasworks Street, the Council has a number of options to take forward development of the site:

- *direct delivery*: the Council could take on the role of developer, taking full responsibility for funding and delivering the project either directly through its internal teams or via a newly established regeneration vehicle, and would fund the scheme (through borrowing or reserves) and manage the design, procurement of contactors and delivery; this would optimise control over design quality, development mix, sustainability standards, and community benefits and facilitate retention of rental income and other revenue streams; however, the risks of this approach include affordability; full financial exposure to cost overruns, delays, and market downturns; and the requirement for specialist in-house expertise in development, project management, and marketing; and all delivery and sales risk would sit solely with the Council; or

- *disposal of the land (through outright sale or long lease);* the Council could undertake an outright sale or grant a long lease of the site to a private developer, via competitive tender, auction, or negotiated sale and with potentially some conditions attached linked to planning, design standards, delivery timeframes etc; Section 123 of the Local Government Act would apply requiring the Council to achieve the best consideration reasonably obtainable unless the consent of the Secretary of State was sought to disposal of the site at an undervalue pursuant to the General Disposals Consent Circular 6/93; this option has the benefit of simplicity and speed compared with the other options, would generate a capital receipt, transfer the development/ sales risk to a third party and could be simpler from a procurement perspective if structured as a pure land transaction without enforceable conditions: but also risks loss of long-term control over the site's use, quality, affordability and delivery timeframes, including the risk that development of the site could stall, or not occur at all if market conditions or viability changes; there would need to be strong controls to ensure development took place so a leasehold disposal would be preferable as the Lease could be forfeit for breach of covenant if the development did not happen; or

- entering into a *joint venture* with a private developer to deliver the development, sharing risks and rewards; the Council would make available the land and enabling funding whilst the private sector would provide development/investment expertise and funding; the Council would select a private sector partner through a competitive process, potentially through a new corporate joint venture (a new jointly owned company) or via a development agreement with the partner delivering agreed works on Council land with profit/risk sharing mechanisms; in this scenario the Council would benefit from access to private sector expertise and funding whilst retaining influence over delivery of the scheme; this option would also provide the capability to phase development and respond to market changes and provide for profit share and reinvestment, although the risks include the complexity of the procurement and governance arrangements and that the need for a long-term contractual commitment between the parties could reduce flexibility if priorities shift over time.

2.35 Taking all of these factors into account, it is recommended that the Council should consider entering into a procurement exercise to select a joint venture partner. This approach would:

- provide access to development/investment expertise and funding, ensuring affordability and reducing the financial risk to the Council of direct delivery;

- enable the Council to retain an appropriate degree of control over the development mix, delivery timeframes and other matters;

- facilitate shared risk and reward with the potential to recycle development profits over time; and

- require robust partner selection, due diligence and post-agreement/post-development performance monitoring to ensure success.

Procurement options

2.36 There are a number of potential procurement options to facilitate the compliant appointment of a development partner under either the Public Contract Regulations 2015, where relevant, or the Procurement Act 2023 (2023 Act) and these are:

- *Open Procedure* – effectively a single stage tender procedure with no restriction on who can submit a tender; this approach potentially maximises accessibility and could be implemented over a shorter timeframe (due to a reduction in the number of procurement stages) but is also resource intensive with an increased risk of low quality or non-compliant tenders and there is a risk that the Council would not achieve the preferred outcome through this route; or

  Competitive Flexible Procedure - introduced by the 2023 Act this replaces multiple prescriptive EU-derived procedures with a single, highly adaptable competitive process that contracting authorities can design to suit their objectives, provided they comply with the objectives of the 2023 Act; this enables local authorities to structure multi-stage processes, incorporate dialogue or negotiation, and enable more commercially effective procurements tailored to specific markets and opportunities; the 2023 Act also introduces the change of selecting the *"Most Economically Advantageous Tender"* to the broader "*Most Advantageous Tender,"* enabling consideration of wider social, economic, and environmental benefits; however, there are also a number of risks linked to compliance with statutory requirements around time limits and transparency obligations and there is a risk of procedural challenge if authorities fail to document decisions robustly or inadvertently design processes that undermine equal treatment; or

- utilising a *national framework contract* such as the frameworks governed under sections 45-49 of the 2023 Act; frameworks enable contracting authorities to operate a competitive tendering process with pre-qualified contractors and subsequently award call-off contracts without repeating full procurement exercises; conversely, the use of long-established frameworks may reduce competition over time and there are legal considerations attached to the management of call-off processes or the correct publication of contract award notices; in addition, inflexible or poorly scoped frameworks can lock authorities into outdated commercial terms, limiting responsiveness to changing needs.

Programme

2.37 The key programme milestones for the next period following Cabinet approval are:

- Submission of OBC to WYCA (Q1 2026/27 financial year)
- Finalise procurement of detailed site investigations (Q1 2026/27)
- Commence preliminary market engagement, developer partner (Q1 2026/27)
- Approval of OBC (Q2 2026/27)
- RIBA Stage 3/FBC programme commences (Q2 2026/27)
- Hybrid planning applications submitted (Q3 2026/27)
- Cabinet gateway stage (Q3 2026/27)
- Commence procurement of remediation contractor (Q3 2026/27)

- Issue invitation to participate (developer partner) (Q4 2026/27)
- Submission of Full Business Case (Q3 2026/27)
- Planning approval anticipated (Q4 2026/27)
- Approval of OBC (Q4 2026/27)
- Contract award, remediation works (Q4 2026/27)
- Issue invitation to tender, developer partner (Q1 2027/28)
- Remediation works start on site (Q1 2027/28).

3. Implications for the Council

3.1 Council Plan

Alongside other Investment Zone projects, development of the Gasworks Street site has the potential to make a significant contribution to the achievement of a number of cross-Council priorities and wider shared outcomes, as set out in the Council Plan 2025/26. The project will bring forward much needed advanced manufacturing, laboratory space and other floorspace for businesses that are focused on the development and diffusion of innovative solutions to some of West Yorkshire's most significant and deep-seated health and social care challenges and to the improvement of health outcomes whilst supporting local economic growth. As a result, the project is strongly aligned with the achievement of the following Council priorities:

- Local economic growth, working with regional and national partners
- Thriving people and communities
- Protecting the vulnerable and achieving inclusion

and also to the achievement of the following shared outcomes:

- Sustainable economy
- Well

3.2 Financial Implications

WYCA has agreed in principle to allocate £8.55m of capital investment to fund the package of site remediation and other enabling works for the Gasworks Street site, subject to approval of OBC and FBC. This includes development funding of £985,000 that has been utilised to support project development, feasibility work and business case costs, in advance of OBC/FBC approval by WYCA.

The funding is available over the four year period ending in March 2029. No match funding for the project is required from the Council. Any cost over-runs will need to be met through value engineering within the existing budget so appropriate industry-standard assumptions re construction, cost inflation and contingencies have been applied.

3.3 Legal Implications

The Council has entered into a grant agreement with WYCA in relation to the development funding provided to date and will enter into a further grant agreement following approval of the OBC. The grant agreement will stipulate a number of contractual obligations governing what the grant can be utilised for, delivery timeframes and other conditions.

The Council will comply with its Financial Procedure Rules and Contract Procedure Rules when exercising its delegations and when awarding all grants and Contract Procedure Rules and the 2023 Act when awarding contracts to third parties.

The Council must also comply with its public sector equality duty under section 149 of the Equality Act 2010 in relation to the management and delivery of the project.

As the Council has received funding from another public body the provisions of the Subsidy Control Act 2022 (2022 Act) and statutory guidance for UK Subsidy Control Regime are relevant. A subsidy occurs where a public authority provides support to an enterprise that gives them an economic advantage, meaning equivalent support could not have been obtained on commercial terms. In line with the provisions of the 2022 Act the Council has assessed whether the grant for the Gasworks Street project should be considered a subsidy. Prior to receipt of the full grant award the Council will undertake a Subsidy Control Assessment in this respect. In the event that the grant award can be considered a subsidy, it is to be noted that the Government has established the English Investment Zones subsidy scheme for this purpose to support subsidy control compliance for Investment Zones including provision for *"grant funding for local infrastructure, research and innovation, skills, and business support."*

3.4 **Climate Change and Air Quality**

The project has the potential to make a positive contribution to the Council's climate change and air quality objectives. These will include the adoption of active travel measures and sustainable design and construction principles. Further detail will be provided at RIBA Stage 3.

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

An IIA and Equalities Impact Assessment have been completed in draft in respect of the programme. There are potential risks associated with the scheme including:

- the wider economic climate could impact on the ability to bring forward the proposed development through delays in the procurement of a development partner, or in bringing forward the proposed development to provide suitable accommodation for health/life sciences occupiers; these risks are mitigated by the level of interest that the site has already generated; substantial levels of unmet/latent demand for industrial floorspace in the Huddersfield market area and ongoing market engagement/lead generation activity; and

- in acting as Accountable Body to WYCA for the grant, the Council will be required to ensure compliance with relevant eligibility, Subsidy Control, procurement and branding/publicity requirements, including by delivery partners, again with the potential risk of grant clawback in the event of non-compliance; this is mitigated by the Council's extensive experience (and that of its delivery partners) in delivering similar capital projects and revenue programmes including previous European Union and UK Shared Prosperity Fund programmes which required a rigorous and ongoing focus on compliance.

4 Consultation

A wide range of public and private sector stakeholders have been consulted in developing the programme, including WYCA and the University of Huddersfield. This has informed the development of the masterplan and delivery programme and also ensured

that the Council's proposals for the development of the site are aligned with the University of Huddersfield's vision for the NHIC.

5 Engagement

The Council will continue to engage with participating businesses to ensure that ongoing delivery is informed by robust feedback. There has also been full engagement with the Council's Portfolio Holder for Finance and Regeneration.

6 Options

6.1 Options Considered

The Council could choose not to accept IZ funding for the delivery of the project. This would significantly limit the opportunities to provide support for start-up/scale-up businesses in the health, wellbeing and life science sectors and impact on the delivery of other elements of the IZ programme, including the Huddersfield Health Innovation Incubator proposed capital projects. It would also generate reputational risks for the Council in respect of its relationship with the University of Huddersfield, WYCA and other key stakeholders.

The Council has considered a range of options to facilitate the development of the site, including direct delivery; disposal by lease or sale; and the appointment of a private sector delivery partner. These are outlined in paragraphs 2.34 and 2.36. Appointment of a developer partner will facilitate access to development/investment expertise and funding, enable the Council to retain an appropriate degree of control over the development mix, delivery timeframes and other matters and facilitate shared risk and reward.

6.2 Reasons for recommended Option

Accepting external funding and approving delivery of the programme will optimise the benefits of the project for businesses and residents.

7 Next steps and timelines

Next steps will include:

- Submission of the OBC to WYCA (Q1 2026/27 financial year)
- Finalise procurement of detailed site investigations (Q1 2026/27)
- Commence preliminary market engagement, developer partner (Q1 2026/27)
- Approval of OBC (Q2 2026/27)
- RIBA Stage 3/FBC programme commences (Q2 2026/27)

8 Contact officer

Chris Duffill, Head of Business and Skills chris.duffill@kirklees.gov.uk

9 Background Papers and History of Decisions

S2SEC Cabinet V6 - LMT.pdf
Cabinet Report - GR Project Delivery Funding - FINAL.pdf

10 Appendices

Appendix 1: Site plan
Appendix 2: CBRE report

11 Service Director responsible

David Wildman, Service Director Skills & Regeneration.

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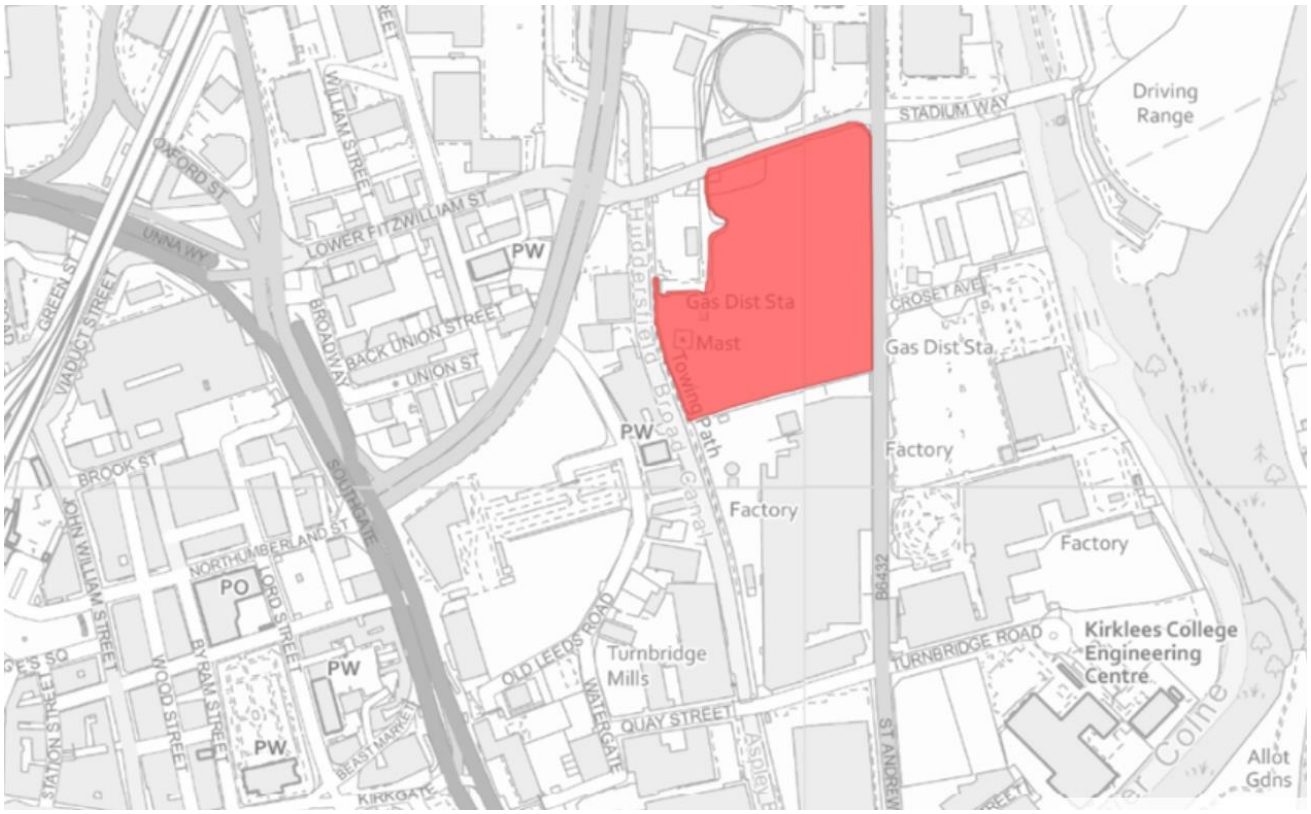
Appendix 1: Gasworks Street site plan



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West Yorkshire Combined Authority

CBRE

West Yorkshire

Life Sciences & Digital Health

Supply & Demand Study

CONFIDENTIAL AND PROPRIETARY

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01

Executive Summary

01 EXECUTIVE SUMMARY

Introduction & Scope of Report

This report, commissioned by the West Yorkshire Combined Authority (WYCA), aims to explore the potential for real estate development within the Life Sciences and Digital Health sectors in West Yorkshire. The study seeks to address a significant gap in the national and international markets by capitalising on the region's strengths in these fields.

Primarily focusing on Life Sciences and Digital Health, the report provides detailed recommendations regarding site locations, necessary infrastructure, and facilities to attract sustained investment. The goal is to foster growth within the West Yorkshire Life Sciences and Digital Health ecosystem and to supply evidence for engaging with developers and investors effectively.

The analysis evaluates West Yorkshire's potential to meet the UK's national demand for Life Sciences and Digital Health focused real estate. It identifies opportunities that real estate investments can unlock, based on the region's current and emerging strengths. The study also examines the local talent pipeline and ecosystem, offering a foundation for developing specialised Life Sciences real estate to drive sector growth.

Additionally, the report includes a thorough assessment of the existing demand and supply within the West Yorkshire Life Sciences cluster, as well as comparisons with other regions. It outlines priorities for facility types, company sizes, locations, and broader market considerations, highlighting local strengths and interdependencies.

Finally, the report suggests strategies to enhance regional engagement with developers over the medium to long term. It assesses the current environment for nurturing start-ups and scale-ups and identifies infrastructure needs and opportunities for further development, leveraging West Yorkshire's sector strengths.

01 EXECUTIVE SUMMARY

Key Findings:

THE WEST YORKSHIRE LIFE SCIENCES ECOSYSTEM, THE OPPORTUNITY & TARGET MARKET

The UK Life Sciences sector benefits from strong bipartisan support, with recent government **commitments of £20.4 billion to R&D** reinforcing its importance to economic growth and innovation. West Yorkshire is **emerging as a top-10 cluster**, showing significant potential alongside the likes of Birmingham and Glasgow. This momentum is driven by **strengths in MedTech** especially, Digital Health and Biotech, with strong foundation in healthcare innovation and scalable tech ecosystems.

Investment Momentum: Venture Capital (VC) activity in West Yorkshire is dominated by Life Sciences and Technology, representing **70% of deals and 58% of funding,** with a majority of this funding going to companies located in Leeds. While most deals **remain in early stage,** global interest, particularly from European VC funds signals the region's growth reputation. Local demand for funding remains strong, supported by institutions like **Northern Gritstone,** which facilitates **high-growth science and technology ventures.**

West Yorkshire's **51,618 life sciences professionals represent a 10% annual growth,** with clinical research and cardiovascular medicine as key strengths. The **highest density of these employees are based in Leeds,** with a concentration considerably higher than the national average. Despite this, competition for skilled professionals and a net talent loss to larger cities like London and Manchester highlight the need for **focused retention and recruitment initiatives.**

UNIVERSITY OF LEEDS

THE UNIVERSITY OF LEEDS RANKS IN THE UK'S **Top 15 for spinout creation** DRIVING INNOVATION AND ATTRACTING INVESTMENT THROUGH INITIATIVES LIKE NORTHERN GRITSTONE

West Yorkshire **requires a range of lab facilities,** including Dry Labs and CL2 spaces, tailored to meet **operational and Digital Health demands.** This diversity and flexibility in the facilities is critical to supporting the region's life sciences growth and fostering innovation.

The UK aims to develop 21 million sq ft of lab space by 2030, yet investment remains concentrated in established hubs. **West Yorkshire's pipeline includes 45,166 sq ft in Leeds by 2027 and 546,444 sq ft of potential future developments.** Huddersfield also boasts significant upcoming projects, while Bradford focuses on its Knowledge Quarter. Interim solutions are essential to bridge current gaps in supply.

Key barriers include limited market data, a lack of unified regional value propositions, dispersed activity diluting impact, and economic uncertainties such as inflation and rising build costs. Addressing these issues will be vital to unlocking development potential and encouraging speculative projects.

West Yorkshire faces challenges in competing with Manchester, where **higher prime office rents offer better returns for investors.** Leeds is the region's most competitive location but requires coordinated efforts to position West Yorkshire as a viable alternative for life sciences investment.

01 EXECUTIVE SUMMARY

Key Findings:

WHERE ARE THE KEY OPPORTUNITIES

Organisations are increasingly using an 'Open Innovation' model, collaborating with external parties to drive R&D, reduce costs, and accelerate time to market. Clusters of companies in specific geographic locations enhance productivity by providing access to specialised talent, knowledge transfer, and infrastructure, fostering innovation and growth.

CBRE's Science & Innovation Success Framework, aligned with the UKSPA framework, helps develop and reposition science and innovation assets by identifying key success components. It has been used to analysis West Yorkshire's respective key regions, highlighting key strengths and constraints in respect of growing as a Life Sciences cluster.

CAMBRIDGE	**The Cambridge Biomedical Campus is a leading science park focused on drug discovery, which faces challenges in talent retention and supply of lab space but is poised for expansion to support more life sciences ventures to high tenant demand and investor activity.**
MANCHESTER	**Manchester's Oxford Road Corridor leads its emerging market, supported by developing clusters and abundant talent, but needs more VC funding to match the Golden Triangle's growth.**
LEEDS	**Leeds is an emerging life sciences hub with strong digital health focus and talent concentration but needs more venture capital and grow on space to compete with better-funded clusters.**
HUDDERSFIELD	**Huddersfield's life sciences sector, driven by Health & Wellbeing, MedTech, and manufacturing, needs a university-led incubator to boost innovation and investment for future growth. The is the opportunity for TechBox development to boost activity and satisfy existing demand within the station to stadium corridor.**
BRADFORD	**Bradford's evolving life sciences ecosystem, driven by academic and healthcare innovation, needs more funding and incubators to strengthen its position, with initiatives like the DHEZ and BREE Centre offering growth opportunities.**
WAKEFIELD	**Wakefield is a less developed life sciences market, with relatively limited infrastructure and talent, therefore has a higher barrier to becoming established.**
HALIFAX	**Halifax's is a less developed life sciences market, with relatively limited infrastructure and talent, therefore has a higher barrier to becoming established.**

Key Findings:

WHAT ARE THE CRITICAL SUCCESS FACTORS?

West Yorkshire has the potential to become a thriving life sciences and technology ecosystem due to its vibrant start-up culture, skilled graduates, and strong networks. Challenges include the need for more "grow-on" space, high-risk speculative development, high interest rates, rising construction costs, and stagnant rental yields. Successful models from other regions could guide West Yorkshire in overcoming these challenges and unlocking its potential.

01

Centralise efforts on established clusters rather than spreading resources efforts and funding to thin across different regions.

02

Encourage and support the promotion of key established sites at Leeds Innovation Village (Leeds) and NHIC (Huddersfield) to identity experienced real estate developers to help build the ecosystem and deliver "grow on space" to provide a natural pathway to the incubation space already delivered.

03

Where possible, **provide attractive incentive conditions for investors/ developers** to encourage them to enter the market such as financial incentives (green loans), public private partnerships (PPPs) and strategic planning support to ensure planning is fast-tracked.

04

Promote the sites such as the "Gas Works Site Within the Station to Stadium Corridor" in Huddersfield to deliver the "TechBox" product to support the growth of Life Sciences occupiers who require a mixture of office, labs and industrial but within close proximity to an established cluster.

05

Encourage and establish a recognised incubator hub building within Bradford's Knowledge Quarter's and investigate opportunities to partner with and further establish Listerhills Science Park as a cohesive extension to the existing University support being provided by DHEZ and BREE.

06

Regularise and monitor "take up" of space and evidence of "named demand" data to raise awareness of West Yorkshire as an established market to investors.

07

Collectively produce a competitive value proposition to aid local and inward investment to provide a clear identity and articulation of messaging as a region.

02

The UK and West Yorkshire Cluster in Context

02 THE UK AND WEST YORKSHIRE CLUSTER IN CONTEXT

COMMERCIALISING SCIENCE & INNOVATION IS A STRATEGIC IMPERATIVE FOR GOVERNMENT & INDUSTRY BUT CHALLENGES REMAIN

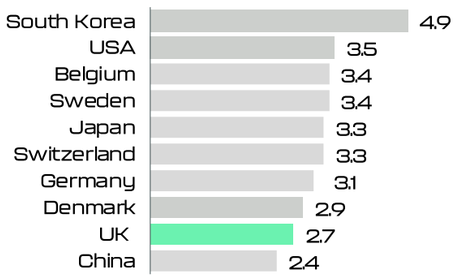
'We can make sure British Life Sciences lead the world'

RACHEL REEVES
Chancellor of the Exchequer

GOVERNMENT INTENT VS INDUSTRY SENTIMENT

- R&D investment vs GDP (2022) still trailing global peers (UK 2.7 % ($37.4Bn) vs US 3.5% ($891.1Bn)).
- The IPO market has not revived as anticipated, dampening growth prospects for start-ups and VCs.
- The UK is now only the eighth largest drug exporter in Europe, behind much smaller economies like Switzerland, Ireland, the Netherlands and Belgium.

R&D AS % GDP

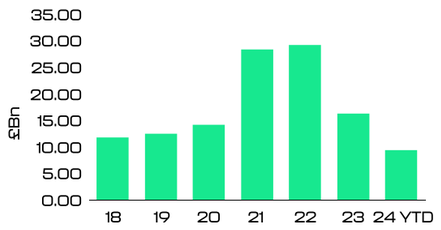


Source / OECD

BUT ENCOURAGING SIGNS FROM LABOUR & VC

- The UK's re-entry into the EU Horizon Scheme marks a significant boost for scientific collaboration
- The Labour party express a renewed focus on Life Sciences as a cornerstone for economic growth in the UK.
- Venture capital investment in UK Life Sciences is expected to stabilise at £19 billion, the third highest on record, reflecting robust investor confidence and growth in the sector.

TOTAL VC FUNDING TRENDS IN THE UK



Source / Pitchbook, CBRE Research

THE WEST YORKSHIRE CLUSTER IN CONTEXT

Access to capital, particularly for research and development, is crucial for driving the organic growth of innovative companies. While London, Cambridge, and Oxford dominate the UK's life sciences landscape with established ecosystems and a high concentration of high-growth businesses, West Yorkshire is rapidly emerging as a notable innovation cluster.

Ranked among the UK's top 10 innovation hubs, West Yorkshire already has a strong base of funded companies. However, compared to more mature clusters like Manchester and Edinburgh, there remains significant potential for growth. As this cluster continues to develop, these companies are expected to secure larger funding rounds in later stages, further strengthening the local ecosystem and attracting additional investment to the region.

VC FUNDING FOR COMPANIES IN HIGH-GROWTH INNOVATION DRIVEN SECTORS

(Excluding industries not relevant to Life Sciences and Technology (e.g. Financial Services, Back Office Process Innovation, etc)

Source / PitchBook & CBRE Research

02 THE UK AND WEST YORKSHIRE CLUSTER IN CONTEXT

Life Sciences companies' locations across West Yorkshire illustrate that clusters forming & evolving

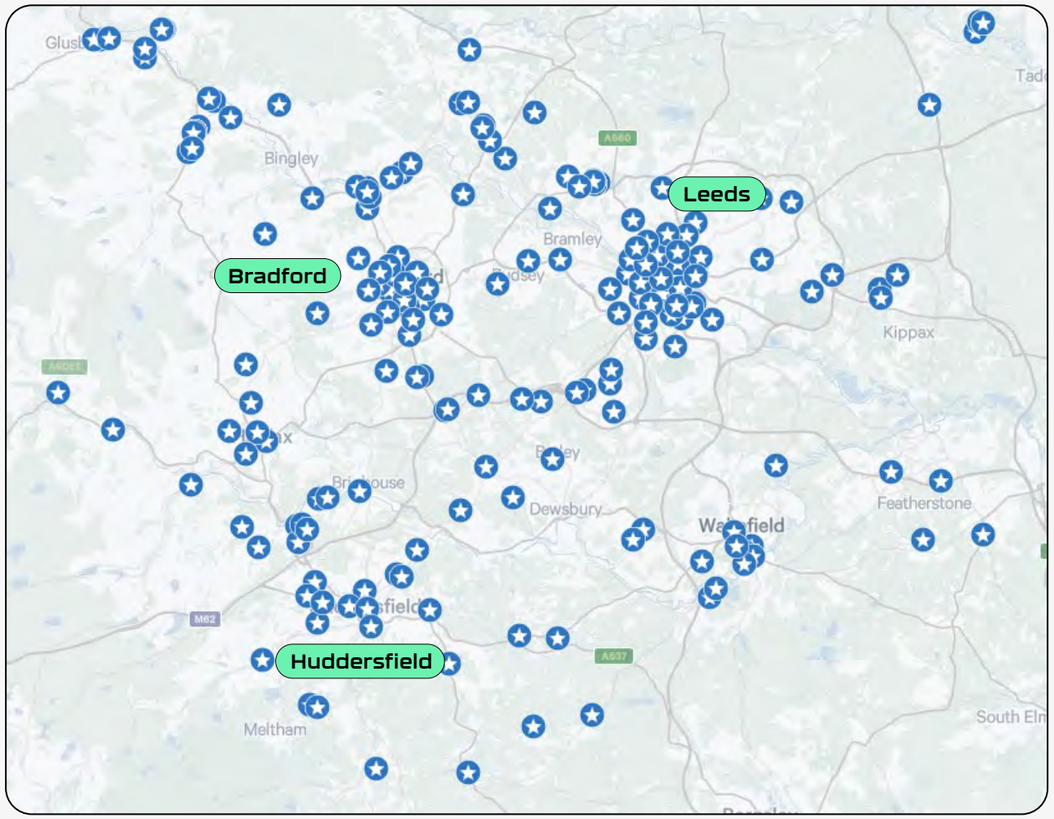
With over 600 health and life sciences companies, of which 250 MedTech firms, and more than 90 digital health enterprises, West Yorkshire is an increasingly attractive destination for innovation, where ideas are tested, embedded, and scaled both locally and internationally.

While activity remains dispersed across the region, a significant share of these companies operate outside of the main life sciences clusters. As new lab-enabled commercial space comes online, a consolidation trend is expected, driven by the need for proximity to infrastructure, talent and collaborative networks.

Leeds leads the region in concentration of life sciences firms, followed by Bradford, Huddersfield, and smaller clusters in Halifax and Wakefield. Although these numbers remain modest compared to global hubs like the Golden Triangle, there is a clear opportunity to reach critical mass–particularly in Leeds city centre– where density and connectivity can unlock open innovation and cross-sector collaboration.

MedTech represents the dominant vertical in West Yorkshire, followed by Contract Research and Manufacturing (CROs/CDMOs), Digital Health, and Biotech/Pharma, with sub-specialisms in small molecules and drug discovery. Leeds and Huddersfield are especially well-positioned to capture growth in these areas, underpinned by strong academic institutions and a robust manufacturing base. However, competitive pressures are mounting as Bradford and Huddersfield pursue overlapping strengths, reinforcing the need for strategic coordination, differentiated positioning and targeted investment.

It is important to note that sector data, often based on Standard Industrial Classification (SIC) codes, has its limitations. These codes are self-assigned and may capture adjacent or unrelated sectors. For example, including pharmacies under life sciences–underscoring the need for cautious interpretation when shaping regional strategy.



02 THE UK AND WEST YORKSHIRE CLUSTER IN CONTEXT

Strong capabilities in complementary Life Sciences & Tech sector specialisms offer promise of sustainable pipeline of scalable innovation

West Yorkshire has a strong Life Sciences heritage in several core sectors including BioTech, Healthcare, MedTech sectors which are rapidly building on the already mature technological ecosystem. Each of those original sectors are projected to grow significantly in their own right and particularly at the intersect with the Tech, Digital & Data sector. In addition, there is an inherent complementarity between the above-mentioned specialisms which is driving broader cross-pollination and the emergence and high growth of "smart specialisms" such as Digital Health etc.

This, in turn, is driving the creation of innovative capabilities which are applicable to a broad addressable market. These dynamics suggest that there is longevity of relevance and further scope for growth in the cluster.

BIOTECH

MEDTECH

HEALTHCARE & WELLBEING

ADVANCED MANUFACTURING

TECH, DIGITAL, DATA

UNIVERSITY OF LEEDS
Innovate UK
The Leeds Teaching Hospitals NHS Trust
LEEDS BECKETT UNIVERSITY
West Yorkshire Combined Authority
NEXUS UNIVERSITY OF LEEDS
University of HUDDERSFIELD
UK Research and Innovation
UNIVERSITY of BRADFORD

NIHR | Leeds Biomedical Research Centre
EASTBURY CENTRE

GROW MedTech
NATIONAL MEDTECH FOUNDATION

CENTRE FOR HEALTHTECH INNOVATION
Health Innovation Leeds

AMRC ADVANCED MANUFACTURING RESEARCH CENTRE
CKMA CALDERDALE AND KIRKLEES MANUFACTURING ALLIANCE

IBM

02 THE UK AND WEST YORKSHIRE CLUSTER IN CONTEXT

Research institutes and life sciences cluster in West Yorkshire

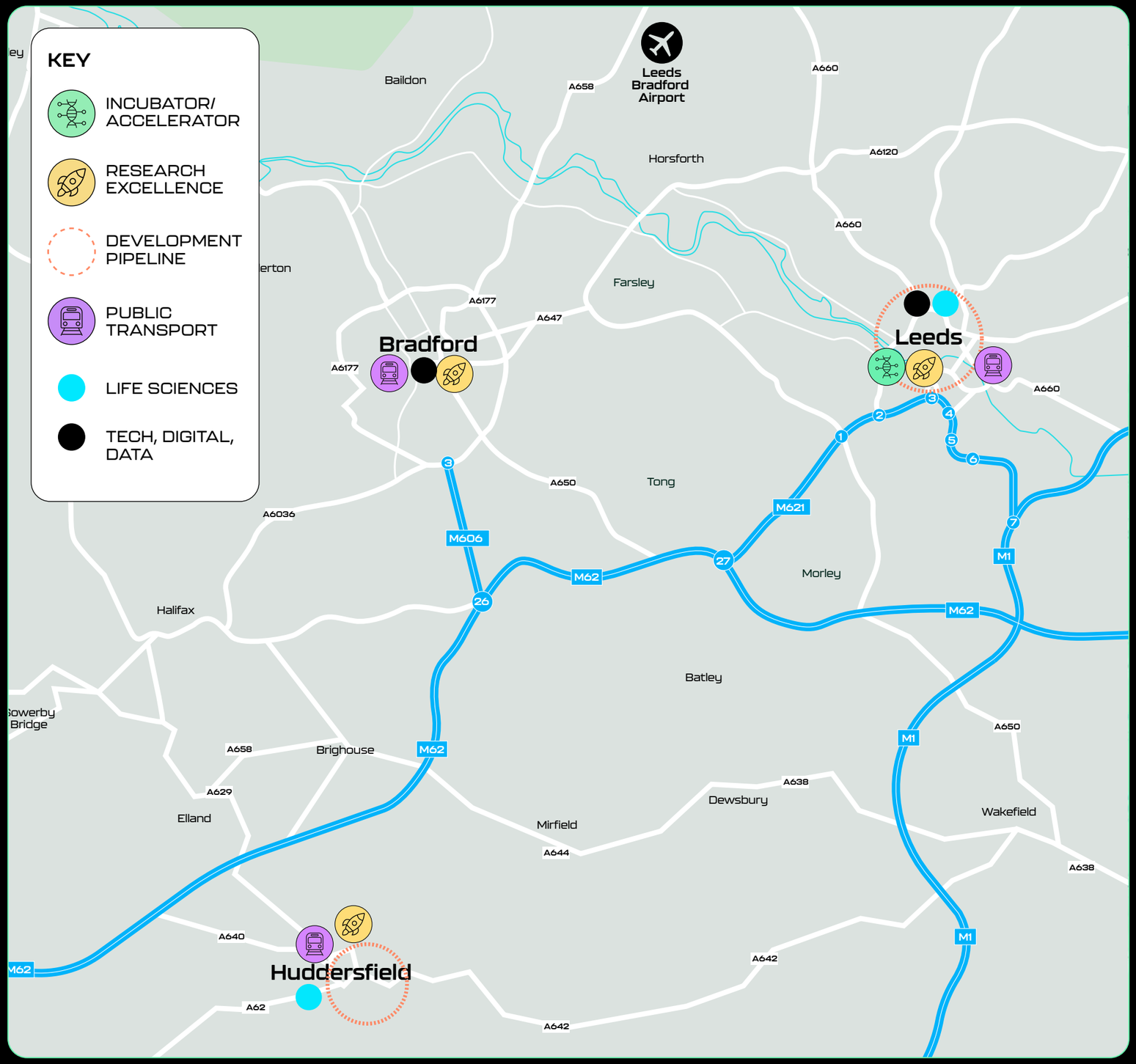
The strong network and distribution of health sector anchors, research institutions, and innovation hubs across the region, particularly in Leeds, Bradford and Huddersfield, highlights a well-co-ordinated ecosystem collectively working towards improving health outcomes and fostering economic growth through innovation facilitating knowledge exchange and partnership.

This integrated approach brought together by the Healthtech Cluster Partnership Group, will continue to maintain "one voice" when attracting both national and international companies and talent to the region.

Existing support from Nexus, DHEZ/BREE and NHIC are critical in providing a platform for growth, alongside Universities, NHS and research centres like NIHR, allowing growing companies to have early engagement in terms of the correct pathway for their growth, whilst developing key relationships and partnerships.

Proximity and access to data and digital resources plays a crucial role. This is helped by the presence of The Leeds Institute for Data Analytics (LIDA) which supports data-driven health and care research by leveraging big data to improve health outcomes.

The diverse range of assets in West Yorkshire plays a crucial role in driving economic growth, fostering innovation, improving health outcomes and developing a skilled workforce. These assets collectively enhance the region's competitiveness and capacity to address current and future health challenges.



02 THE UK AND WEST YORKSHIRE CLUSTER IN CONTEXT

West-Yorkshire occupiers benefit from several key science-based networks supporting the growth of the local ecosystem

There are strong local and regional networks between science, public and private sector institutions supporting the development of the life sciences community. Science-based community networks are core to the development and growth of the local ecosystem - these help raise the brand and profile of West Yorkshire as a competitive inward investment destination. West Yorkshire has access to several business support and investment networks which are focused on the health and life sciences sectors. The established Healthtech Cluster Partnership Group provides an excellent dynamic and engaged platform of key stakeholders which drive forward the region to fulfil its potential.

Medipex specialises in supporting the development of novel healthcare solutions. Originally established as an NHS Innovation Hub, Medipex now works with a broad range of clients, including the NHS, private sector, academia, and charities. It provides expert advice and support throughout the innovation journey, from idea generation to commercialisation. Medipex's services include intellectual property management, market analysis, and regulatory guidance, helping innovators navigate the complex healthcare environment and bring their products to market.

The National Institute for Health and Care Research (NIHR) has a structured network of support bodies which support West Yorkshire to facilitate health research including Clinical Research Network (CRN) Yorkshire and Humber, which supports the delivery of high-quality clinical research across the region providing funding for research support posts, offers training, and helps with patient recruitment. Other support functions include Research Design Service (RDS) Yorkshire and Humber, West Yorkshire Research and Development (R&D) and Local Clinical Research Facilities (CRFs). These bodies work collaboratively to support and advance health research in West Yorkshire, ensuring that studies are well-designed, adequately funded, and effectively implemented.

Innovate UK, the UK's national innovation agency, supports the life sciences ecosystem by providing funding, fostering collaborations, and facilitating innovation networks. In West Yorkshire, Innovate UK has invested over £63 million in the past five years, focusing on health, manufacturing, and materials industries. Key initiatives include the West Yorkshire Local Action Plan, which encourages local businesses to innovate, and regional engagement events like Innovate Local: West Yorkshire, which connect businesses with experts and collaborators. These efforts help drive innovation, economic growth, and improved healthcare outcomes in the region.

Medilink is a healthcare innovation hub that supports the development and commercialisation of medical technologies and services. It provides a range of services, including business support, networking opportunities, and access to funding and investment. Medilink works closely with the NHS, academia, and industry to foster collaboration and drive innovation in healthcare. By offering expert advice and hands-on support, Medilink helps innovators bring their ideas to market, ultimately improving patient care and healthcare service.

Health Innovation Leeds (part of Leeds Academic Health Partnership) launched in early 2024 to collectively showcase as leading competitive health innovation ecosystem that integrates world-class academic research, a burgeoning healthtech industry cluster, and a single, cohesive health and care partnership to advance health and care through innovative digital, data and AI technologies.

The Association of British HealthTech Industries (ABHI) plays a pivotal role in supporting and advancing the health and life sciences ecosystem in West Yorkshire through collaborating with local health, care, and academic leaders to drive health technology advancements, economic growth, strategic partnerships, policy alignment and showcasing excellence.

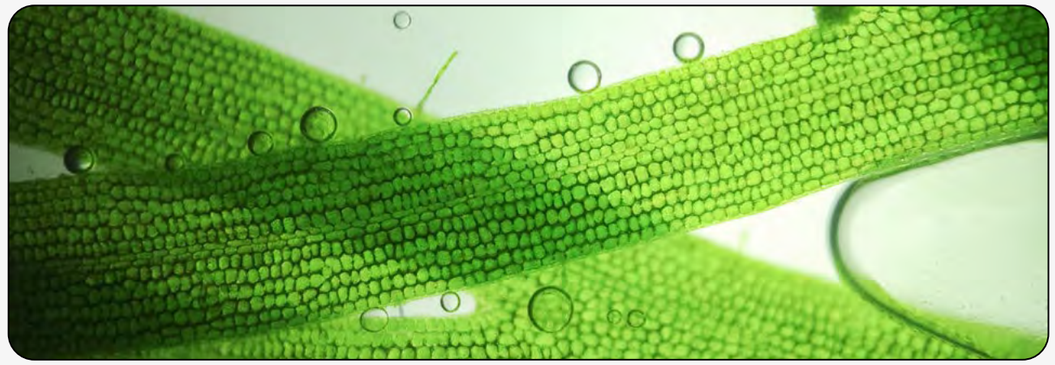
02 THE UK AND WEST YORKSHIRE CLUSTER IN CONTEXT

Life Sciences and Tech Dominates West Yorkshire VC Landscape

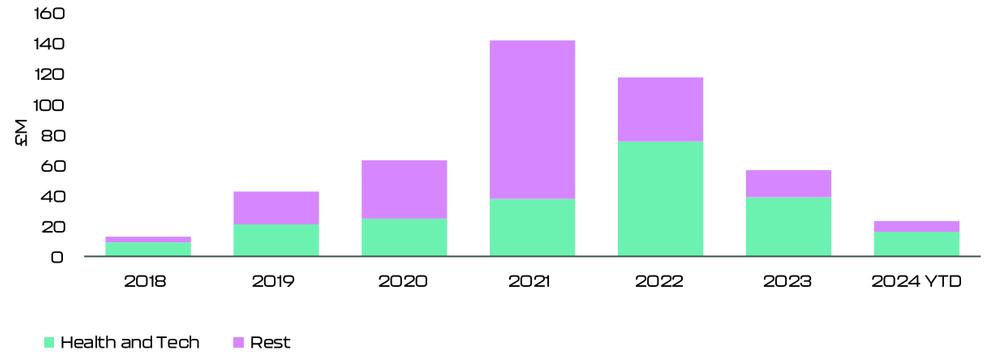
Venture capital funding is a vital driver of startup growth and serves as a key indicator of company creation and expansion. In West Yorkshire, the life sciences and technology sectors account for a significant share of VC activity, representing 70% of total deals and averaging 58% of total investment value. Notably, this share has steadily increased since 2019, underscoring the region's rising prominence in these industries.

While overall funding levels have declined, this trend reflects broader market conditions across the UK and globally rather than a regional issue. During the pandemic, the influx of so-called "tourist investors" (non-specialist funds that entered the life sciences sector without deep expertise or rigorous due diligence) contributed to a temporary surge in funding. As market conditions tightened and capital became less readily available, this activity naturally tapered off.

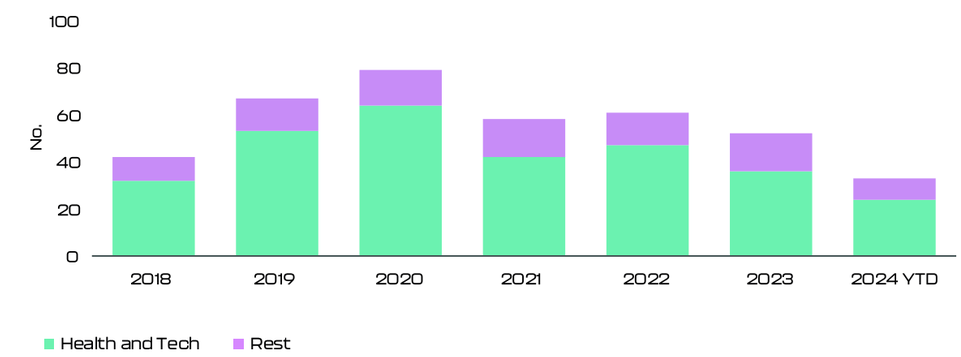
Despite this, organic demand within West Yorkshire's ecosystem remains strong. Importantly, the number of deals has held relatively steady and is expected to remain close to historical averages. Since funding announcements can take time to become public, final figures may ultimately reflect higher investment levels than initially reported. Crucially, most VC deals in the region are at the pre-seed, seed, or early stages – a positive indicator for long-term growth.



FUNDING OF DEALS BETWEEN LIFE SCIENCES AND TECH VENTURE CAPITAL (VC) IN WEST YORKSHIRE COMPANIES



NUMBER OF DEALS BETWEEN LIFE SCIENCES AND TECH VENTURE CAPITAL (VC) IN WEST YORKSHIRE COMPANIES



02 THE UK AND WEST YORKSHIRE CLUSTER IN CONTEXT

Talent Clusters

The map illustrates the distribution and concentration of employment in the Professional, Scientific, and Technical activities sector across West Yorkshire. A significant cluster is evident around Leeds city centre, particularly near the university and hospital, as well as to the east of the city. These areas benefit from their proximity to key institutions and infrastructure, supporting the growth of scientific and technical roles.

Smaller clusters are also present around Bradford, Halifax, and Huddersfield. However, it is important to note that this metric includes professional services such as consultancy and banking, which likely contribute to the employment spikes in Halifax–a location not traditionally associated with the life sciences sector. This nuance highlights the importance of interpreting employment concentrations in context, particularly in regions with diverse economic activities.

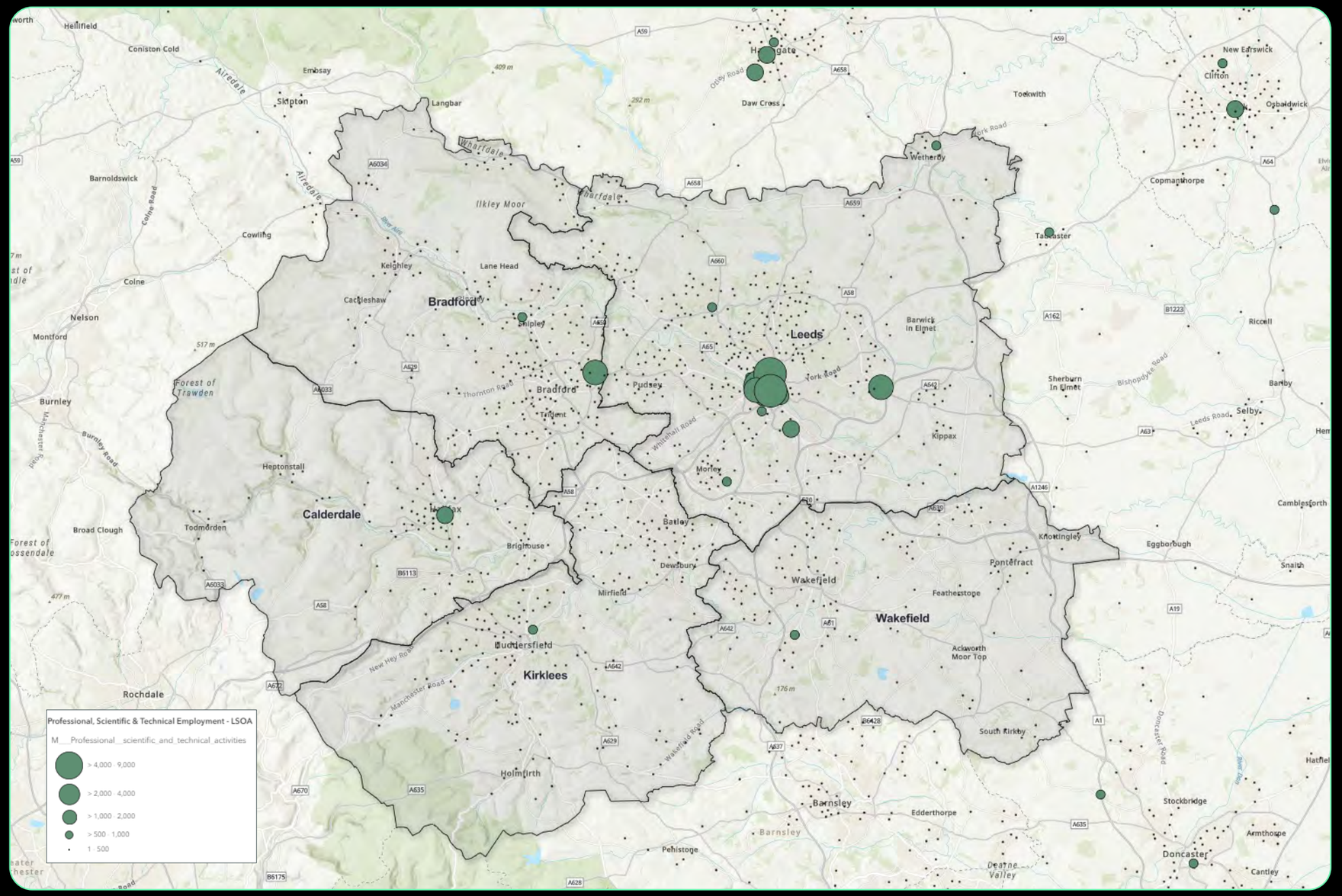


FIGURE 8

Distribution of employment in professional, scientific and technical activities

Sources / NOMIS 2024, ESRI 2024

Future[gazing] the evolution of the West Yorkshire ecosystem

The following are some of the key drivers which will play a role in shaping the future of the West Yorkshire Ecosystem and its place in the national and international space more broadly.

01

ORGANIC DEMAND CREATION

TO CONTINUE TO PLAY AN INTEGRAL ROLE IN DRIVING GROWTH IN THE WEST YORKSHIRE CLUSTERS

Healthy start up formation / spinout activity is likely to continue driven by credibility of science, the strong ties to the NHS and strong graduates.

Scale-up's business requirements evolve - beyond expanding R&D capabilities, corporate & high-tech manufacturing functions begin to develop; colocation of functions in some sectors such as MedTech is needed/an advantage.

02

INWARD INVESTMENT

LIFE SCIENCES COMPANIES SEE THE UK'S STRENGTHS AND WEST YORKSHIRE HAS REAPED THE REWARDS (SYNGENTA IN HUDDERSFIELD)

Large players are increasingly accessing multiple UK locations as part of their R&D strategy. This does not always translate into large footprints but enhances the capabilities & attractiveness of the ecosystem.

The Golden Triangle has been the destination of choice for US companies establishing presence in UK, however, other credible ecosystems (such as Manchester, Leeds & Huddersfield) , are well placed to benefit as of when they develop.

03

URBANISATION OF INNOVATION

IS A GLOBAL TREND AND WEST YORKSHIRE IS ALREADY BENEFITING

The emergence of centrally located destinations is reshaping occupier's views on the most desired locations (e.g. King's Cross' is the UK best case study, but other clusters have benefited too (e.g. Leeds)).

The role of relatively affordable well-connected alternatives will be key in retaining scale ups in West Yorkshire, which is well placed to respond to this (e.g. the knock-on effect seen in Seaport in Boston).

04

MICRO ECOSYSTEMS

EXPECTED TO EVOLVE SIGNIFICANTLY IN THE COMING YEARS AS NEW MODALITIES DEVELOP FURTHER AND SHAPE EACH CLUSTER INDIVIDUALLY

Even mature clusters like King's Cross' identity are still forming and is being shaped around its science institutions and its growing community of occupiers.

Significant number of Life Sciences companies are still located out of the main clusters. Emerging micro-ecosystems with strong science/R&D propositions, like Leeds, Bradford and Huddersfield, are well placed to benefit as the market matures.

03

Real Estate as an Enabler

03 REAL ESTATE AS AN ENABLER

Lab Types & Uses

These are the different types of lab space that are needed across the Life Sciences sector depending on the type of operational use. Each type has its own specific characteristics such as height and specification/ equipment. Based on the activity and specialisms within West Yorkshire surrounding Digital Health, the following lab uses may be required which are targeted more towards Dry Labs and CL2 (1-4) within the table.

Digital Health: Offices and Labs focused on developing and testing telehealth platforms, remote monitoring systems, and virtual care solutions.

AI and Machine Learning: Facilities equipped with the necessary computational power and data resources to develop AI-driven health tech solutions, such as predictive analytics and personalised medicine.

Medical Device Prototyping: Spaces for designing, prototyping and testing medical devices. These labs often include 3D printers, CNC machines, and other fabrication tools.

Wearable Technology Development: Facilities for developing and testing wearable health tech devices, including sensors and smart textiles.

TARGET LAB SPECIFICATION PROVISION FOR WEST YORKSHIRE

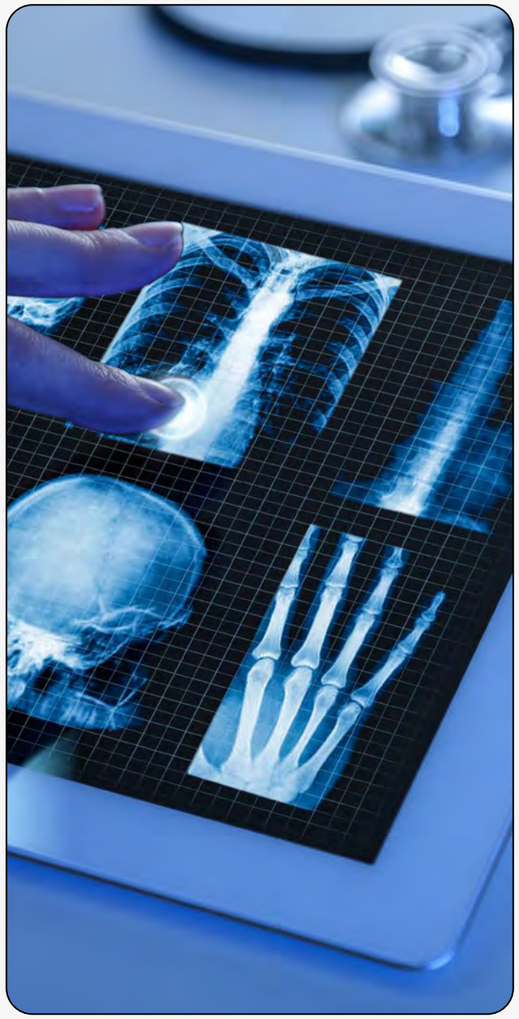
LOW SPEC → HIGH SPEC

01	02	03	04	05	06	07	08	09
Dry research office	**Med Technology Space - Dry Research**	**CL2 Affordable Research Laboratories**	**CL2 Laboratories Medical & Research**	**CL2 Laboratories Bio-Chemistry R&D**	**CL2 Laboratories Radiological**	**Precision Medicine GMP Pilot Plant R&D**	**cGMP Manufacture for Clinical Trials**	**cGMP Commercial Manufacture**
Dry research associated with "Wet" Research Informatics	Dry research Informatics Medical App Development Medical Equipment Design Process Design Industry Engagement Presentation	Medical Research Spin Out Companies Incubator	Bio-Chemistry & Haematology Genetics MicroBiology Pathology Toxicology Diagnostic Healthcare	Bio-Chemistry & Haematology Chemistry Diagnostic Healthcare Clinical Laboratories	Work with Radio - Isotapes. Radioactive sources & radiation generation	Clean room manufacture Small Scale R&D Manufacture	Clean Room Manufacture, Assembly & Packaging	Clean Room Manufacture, Small Scale R&D Manufacture
6 Air charges per-second	**6** Air charges per-second	**6** Air charges per-second	**6** Air charges per-second	**6** Air charges per-second	**6** Air charges per-second	**30** Air charges per-second	**6** Air charges per-second	**30** Air charges per-second

In both mature and emerging lab development markets, there is a noticeable shift towards offering more flexible property solutions that cater to diverse occupier needs. Smaller companies often seek compact, adaptable labs with access to shared equipment, meeting rooms, and amenities. In contrast, medium to larger companies prefer shell and core spaces that allow them to customise the fit-out according to their specific layout and requirements. This approach ensures that a variety of tenant needs are met, fostering a more dynamic and accommodating lab environment. GMP facilities are not usually speculatively delivered by developers, instead driven by occupiers looking to retro fit a shell industrial building or a new "build to suit" development.

03 REAL ESTATE AS AN ENABLER

A Distinct Lack of Built Life Sciences Space Across the UK and WY

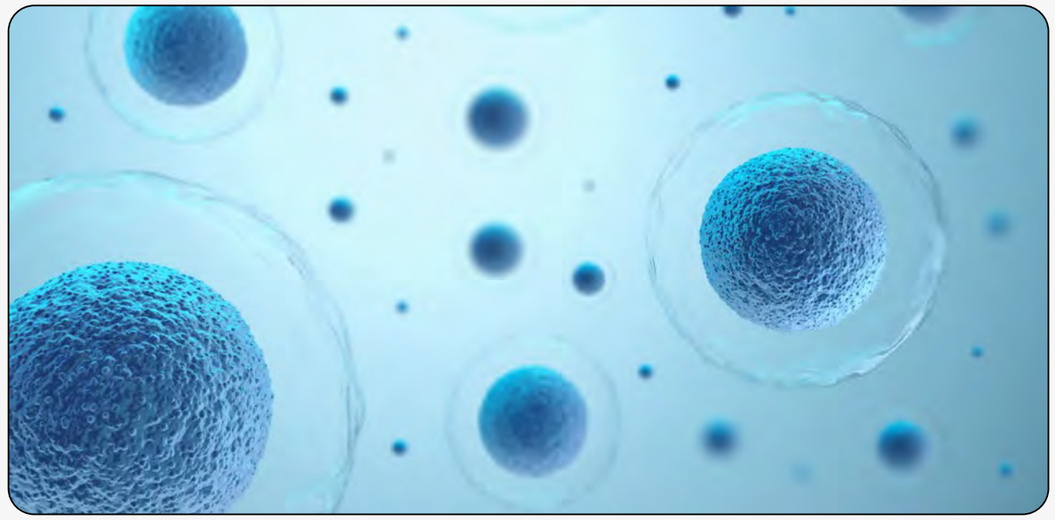


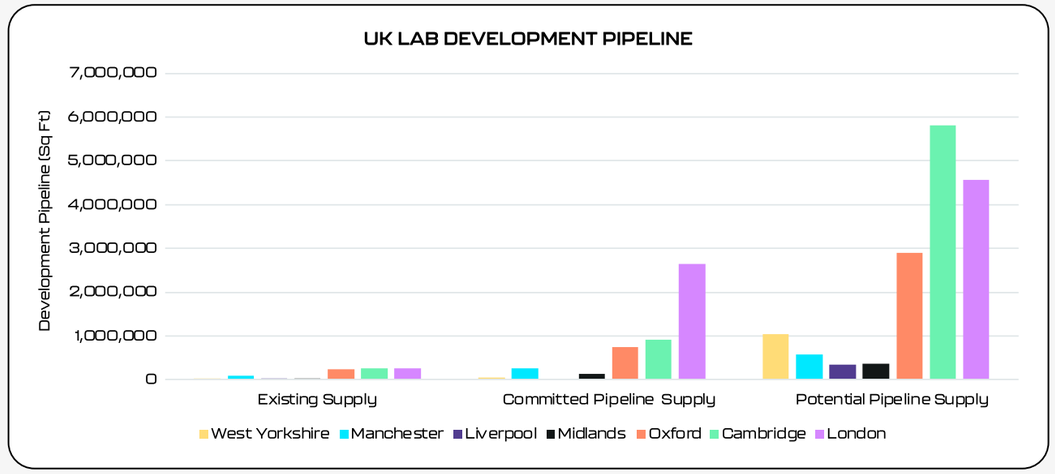
The UK Lab Development Pipeline graph highlights the difference within different regions in terms of existing, committed and potential pipeline supply of laboratory space.

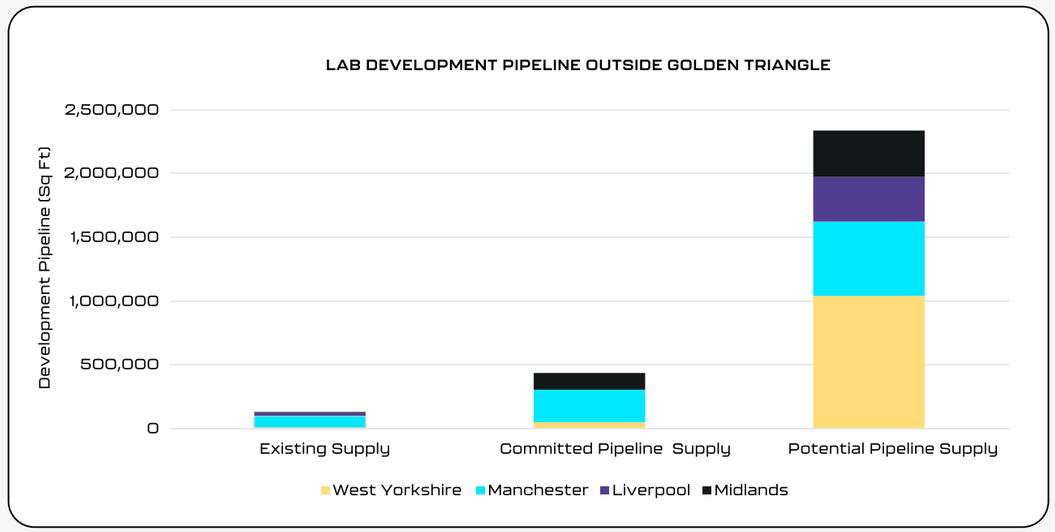
As anticipated, there is a stark contrast in activity between the Golden Triangle locations of Oxford, Cambridge & London compared to the rest of the regions.

It is clear to see that in general there is very limited supply of existing supply across all markets, which is being addressed through development of committed pipeline coming forward in Manchester and the Golden Triangle, but not yet in West Yorkshire.

It is encouraging to see the potential pipeline of supply which could be brought forward in West Yorkshire across the two principal scheme of Innovation Village (Leeds) and National Health Innovation Campus (Huddersfield), outperforming Manchester in this regard.







03 REAL ESTATE AS AN ENABLER

Building the data case for demand

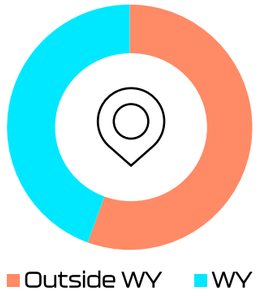
LIMITATIONS ON DATA

To ensure effective analysis of occupier requirements as an evidence base, it is crucial that the entire region collects data at the same level of quality and in a consistent format. Without uniformity in data collection, the analysis may be compromised, leading to inaccurate or incomplete insights. Therefore, standardising data collection practices is essential for reliable and meaningful analysis.

44

live occupier requirements for West Yorkshire

REQUIREMENT LOCATION SOURCE



Our experience of other regions which receive high levels of investor demand suggest they are underpinned by a robust and detailed evidence base to inform current existing demand but also future pipeline demand.

A well-researched credible "named demand" evidence from existing and future occupiers provides a solid foundation for investment decisions. It ensures stability, drives further activity, boosts investor confidence and supports economic and community development, making it a critical success factor in generating more investment in West Yorkshire from a Health & Life Sciences perspective.

As part of this research, we have received information from a number of key stakeholders and sources in relation to existing occupier requirements, which we believe to be the basis of an evidence based approached which can and should be used moving forward, as part of a wider value proposition to drive forward investment activity and confidence.

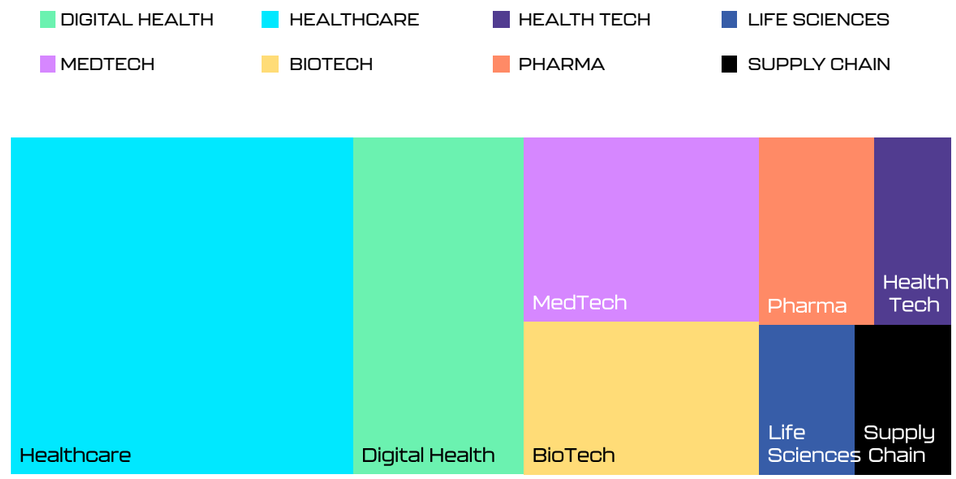
SIZE

As with many regions which do not have high levels of existing supply, there is a correlated reduction in enquiries levels from 1000 sq ft and above. Occupier requirements of 10,000 sq ft + are typically from companies who are well established and growing, often with a footloose element to their requirement in terms of location preference. Therefore, any regions without existing or at least committed/under construction supply, will often not be shortlisted / considered by a company seeking space. The recording of size data needs to be improved in order to produce total named demand figures for the wider region which can be reported as evidence to investors.

SECTORS

From the evidence provided from the stakeholders, the majority of sector activity from companies with active requirements appears to be centred around Healthcare companies with requirements in Huddersfield and Digital Health companies who are looking nationwide. However, we would recommend that this data collection is continued to further analyse these trends beyond this report.

SECTOR REQUIREMENTS



03 REAL ESTATE AS AN ENABLER

Supply Analysis - now and into the future

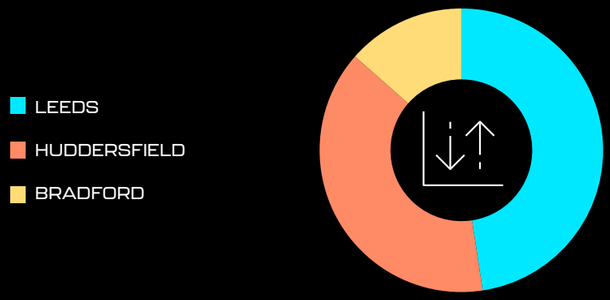
The existing supply of laboratory space within West Yorkshire is limited, with Leeds having the largest amount of available space currently within Nexus at 5,204 sq ft across 5 suites all less than 900 sq ft. Huddersfield has remaining limited supply at 3M Buckley Innovation Centre, where a mixture of offices, workspace and labs are available. All the available lab accommodation across West Yorkshire currently available is below 2,000 sq ft.

The committed pipeline shows a significant increase in lab space, particularly in Leeds, which has 45,166 sq ft of lab / office space set to come forward with the delivery of Old Medical School, however, this is not anticipated to be available for occupiers until 2027, meaning interim measures could be needed to provide immediate grow on space in Leeds, with Nexus being nearing capacity.

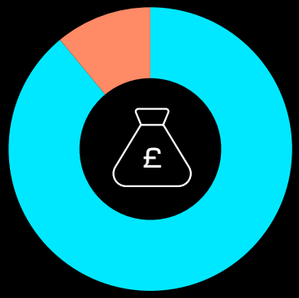
Whilst there has been some significant notable development activity in Huddersfield, with the development of two buildings (Daphne Steele Building and Emily Siddon Building) totalling 201,825 sq ft, the majority of this has been occupied by University and NHS community uses. 5,588 sq ft of lab and office suites have been earmarked as an Innovation Hub to attract private sector companies within the top floor of the building. This committed pipeline, whilst modest compared to other regions, will provide the bedrock to build an ecosystem, providing important market evidence to support further development.

The future pipeline not currently committed for reveals a potential for future lab/office developments, with existing proposed schemes in Leeds and Huddersfield. Leeds has 546,444 sq ft of potential development pipeline space that could be developed at Innovation Village, while Huddersfield has 497,835 sq ft at NHIC and a number of development plots within the Station to Stadium Corridor. Both schemes are named schemes within the WY Life Sciences Investment Zones. Bradford, has plans afoot to deliver space around the Knowledge Quarter, however, no schemes or buildings are currently proposed. If this potential development pipeline can be brought forward it will have a significant positive impact on the wider region through delivering space for existing companies to grow and new companies to land.

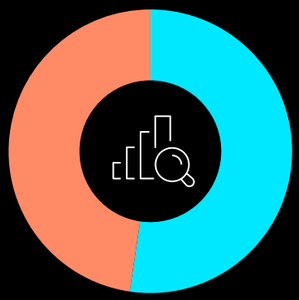
Current Available Lab Stock



Development Pipeline - Committed



Development Pipeline - Not Committed



"Laboratory space"- for the context of this report refers to any property/development which is specifically designed for a user within the Health, Life Sciences and Digital Health sectors. It can be considered to be 100% laboratory or a mix of Lab:Office e.g. 50:Lab 50:Offices.

West Yorkshire Lab/ Office Development pipeline

Emily Siddon Building, NHIC

Status	On Site - Under Construction
Owner/ Developer	University of Huddersfield
Size	94,185 sq ft
Delivery Date	Q4 2025
Summary	The Emily Siddon Building is the 2nd speculative building to have been developed at National Health Innovation Campus (NHIC) with a focus on Health & Wellbeing. The building will deliver the first Govt Community Diagnostic Centre (CDC) within a university campus set directly alongside specialist clinical teaching facilities and an innovation centre on the top floor with 5,588 sq ft for SMEs.

Old Medical School, Innovation Village

Status	Planning not submitted
Owner/ Developer	Leeds Teaching Hospitals NHS Trust & Scarborough Group (SGI)
Size	45,166 sq ft
Delivery Date	2027
Summary	Grade II listing former Medical School will be the first phase of Innovation Village, with a vision that includes creating a dynamic environment for collaboration among clinicians, academics, researchers, and entrepreneurs, establishing a world-class cluster for science, innovation, and technology around Leeds General Infirmary.

Clarendon Wing, Innovation Village

Status	Planning not submitted
Owner/ Developer	Leeds Teaching Hospitals NHS Trust
Size	424,163 sq ft
Delivery Date	2029/2030
Summary	The Clarendon Wing is part of the ambitious Innovation Village project at Leeds General Infirmary (LGI). The Innovation Village will leverage the existing infrastructure and new developments to create a vibrant ecosystem for research, technology, and healthcare. The development will be closely linked with the construction of the two new hospitals at LGI, part of the "Hospitals of the Future" project.

Brotherton Wing, Innovation Village

Status	Planning not submitted
Owner/ Developer	Leeds Teaching Hospitals NHS Trust
Size	142,795 sq ft
Delivery Date	2030/2031
Summary	Brotherton Wing is part of the Innovation Village development is smaller and not as significant compared to Clarendon, but will still play an important role in the wider masterplan.

Knowledge Quarter, Bradford

Status	Sites yet to be identified
Owner/ Developer	Mixed ownership - predominantly Uni of Bradford
Size	Unknown
Delivery Date	Unknown
Summary	The Knowledge Quarter has been identified as an area which has potential to develop future space surrounding University of Bradford. There is also potential for more direct collaboration with Listerhills Science Park to enhance the scale and offering alongside DHEZ.

The above pipeline demonstrates a snapshot of future potential supply for West Yorkshire, highlighting the current clustering of development around existing links to the University and hospitals, all centred around funding through the West Yorkshire Life Sciences Investment Zone.

03 REAL ESTATE AS AN ENABLER

Barriers to Development

A LACK OF DEMAND DATA

The lack of data transparency has previously posed a significant barrier for investors and developers in the life sciences sector within the UK.

This opacity stemmed from limited access to comprehensive and reliable data on transactional market evidence and "named demand" (companies with active requirements for space) which is plentiful in more established US markets such as Boston, San Francisco and San Diego. Without transparent data, investors struggle to accurately assess risks, forecast returns, and make informed decisions, leading to lack of appetite or confidence to invest in a certain region.

Due to the significant activity within the Golden Triangle, this dynamic is shifting. However, the more emerging regional markets still face challenges articulating existing and future demand beyond demonstrating an established and well connected health and life sciences ecosystem.

Within the last 12-18 months there has been increased activity and promotion around the Innovation Village and more recently, the National Health Innovation Campus. Further work is required in order to articulate the future pipeline of development which can help existing occupiers (and new entrants into WY) understand the natural pathway for growth beyond the incubation spaces currently in Nexus (Leeds), 3M BIC (Huddersfield) and DHEZ (Bradford). Increased engagement with the investor/ developer and wider property community will help in this regard.

"Lack of quantitative data to show demand and transactional evidence has stifled investment"

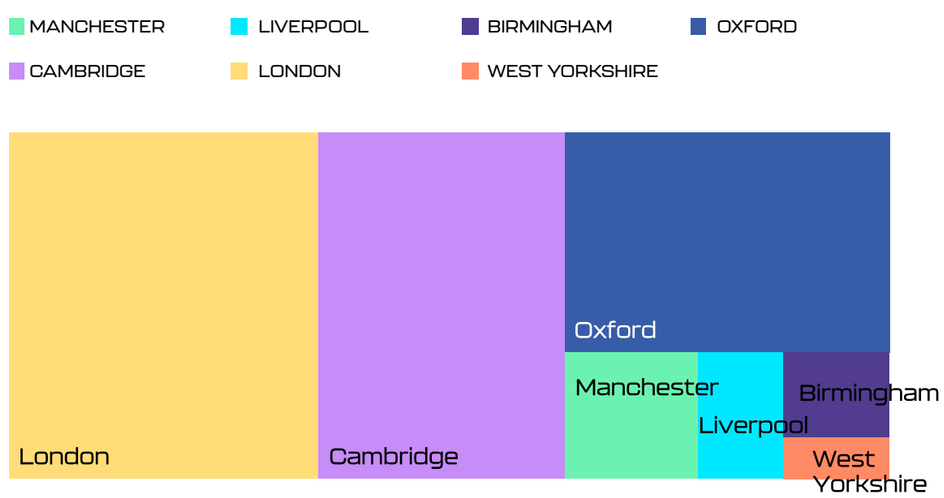
LIFE SCIENCES DEVELOPER

Our investigations as part of this study have outlined greater need for data governance, collection, analysis and transparency (internally and externally) in order for West Yorkshire to elevate itself and fulfil its potential alongside its rival regions.

The collection of data should analyse the types of companies actively seeking funding and use this as a barometer to predict growth in commercial floorspace "take-up" over the next few years. The data should not be published in its raw form. Instead, used to make general analytical statements such as "XXX companies are seeking funding within WY, of which XX are in Digital Health and XX are in MedTech, 60% of which are based outside of WY with the remaining 40% within WY".

In terms of data collected for "named demand", this could be collated by WYCA using the Healthtech Cluster Partnership Group as the platform, building upon the data which has been assembled as part of this study. Assembling and maintaining a consistent level of granular detail of companies who are seeking new space within West Yorkshire will provide an element of key demand evidence which investors use, in part, to inform their investment criteria when deciding whether to deploy capital into a new market. Without this level of detail, investors who are not already familiar or active with the West Yorkshire, may struggle to see beyond this in terms of investment.

LIVE PROPERTY REQUIREMENTS - "NAMED DEMAND"



03 REAL ESTATE AS AN ENABLER

Whats Preventing Development

↓ **BARRIER**

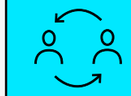
TRANSPARENCY OF MARKET DATA

Despite the efforts of a number of published reports highlighting the strength and depth of the Health & Life Sciences research capabilities and wider ecosystem, from a property perspective, the level of tangible market data to inform investment decisions for new development remains limited. This is often an issue with more emerging markets, but needs to be addressed if West Yorkshire is to attract more long term patient capital investment.

↓ **SOLUTION**

Regularise and monitor "take-up" and "named demand" data

↓ **BARRIER**



LACK OF IDENTITY IN KEY SPECIALISMS

There are many reports and sources which have been produced which seek to articulate the strengths and underlying value through case studies of the Health and Life Sciences sector within West Yorkshire. As the region comprises multiple areas, each with their own specialisms and strengths, a single competitive value proposition to effectively attract investment should be sought, providing various stages of detailed evidence base to articulate the opportunities. This will provide one unified brand and messaging that will enhance collaboration, increase competitiveness, simplify navigation whilst maintaining a strategic vision to drive sustainable economic growth.

↓ **SOLUTION**

Produce a competitive value proposition to aid local & inward investment

↓ **BARRIER**

DISBURSEMENT OF ACTIVITY

There is a tendency to seek to spread the inherent benefits of an emerging cluster throughout a region in order to provide inclusive innovation. Spreading life sciences development activities too thinly across a region could potentially dilute the concentration of resources, talent, and infrastructure necessary for fostering a robust and competitive ecosystem. A concentrated cluster, on the other hand, benefits from synergies, economies of scale, and a vibrant network of interconnected entities, driving stronger growth and positioning the region as a leading hub in the life sciences sector.

↓ **SOLUTION**

Centralised development in strategic hubs

↓ **BARRIER**

MARKET CONDITIONS REMAIN UNCERTAIN

Regional markets outside the Golden Triangle are characterised by lower demand, making speculative development riskier as there is no guarantee of securing occupiers leaving developers reliant on pre-lets to deliver schemes without some form of funding assistance to bridge the viability gap. Economic uncertainty over the past 12-18 months in terms of inflationary pressures and rising build costs, create viability gap issues for developers seeking to develop speculatively. The complex and high costs associated with developing specalised developments incorporating laboratory use further compound the risk profile within the sector.

↓ **SOLUTION**

Lease incentives to experienced life sciences landlords to entice them to WY

03 REAL ESTATE AS AN ENABLER

Opportunities to address barriers

TRANSPARENCY OF MARKET DATA

Regularise and monitor "take-up" and "named demand" data

To gather active requirements from occupiers in West Yorkshire, a professional and independent body is needed to collect market-sensitive information from stakeholders (science park operators, inward investment agencies, agents, landlords etc.). This body must be trustworthy to ensure all contributors feel comfortable sharing information.

However, there may be reluctance to share information openly. Alternative methods could be explored, such as Non-Disclosure Agreements (NDAs) with signed parties or redacted company names to prevent double counting. The key is selecting a suitable organisation to lead the initiative, providing comfort to contributors. A local authority or inward investment agency type organisation is a good fit. If a private sector organisation leads, it may not receive the required buy-in due to perceived lack of independence.

LACK OF IDENTITY IN KEY SPECIALISMS

Produce a competitive value proposition to aid local & inward investment

We propose a comprehensive initiative to develop a competitive value proposition for West Yorkshire, showcasing its unique strengths, specialisms and growth potential.

Key deliverables include a value proposition document, a brand identity and a marketing strategy to promote West Yorkshire's specialisms and drive economic growth. This initiative will differentiate West Yorkshire from other regions, attract new businesses and talent and establish a strong reputation as a hub for innovation and growth. The value proposition will serve as a guiding document for stakeholders, investors, and businesses, while the brand identity and marketing strategy will effectively communicate West Yorkshire's unique strengths and specialisms to the target market, positioning the region for success through varied and engaging content, rather than a single standalone static document.

DISBURSEMENT OF ACTIVITY

Centralised development in strategic hubs

The rationale for West Yorkshire concentrating its investment activity in centralised strategic hubs is based on strategic considerations such as economies of scale, critical mass, specialisation and clustering, infrastructure and amenities, government and public sector support, reducing fragmentation, and enhancing regional identity.

By concentrating investment in the established hubs of Innovation Village, NHIC and Bradford's Knowledge Quarter, West Yorkshire can leverage these benefits to create a more effective, efficient, and competitive economic strategy, driving growth, innovation and prosperity across the region. This approach allows the region to specialise in specific industries, attract and retain top talent, and create a vibrant ecosystem that attracts even more investment and activity, ultimately positioning West Yorkshire as an attractive hub for Digital Health.

MARKET CONDITIONS REMAIN UNCERTAIN

Lease incentives to experienced life sciences landlord to entice them to WY

Investors may require incentives to address viability to speculatively develop office and lab space in West Yorkshire due to the region's demand / risk profile, limited access to capital, and need for long-term commitment, making it challenging to secure traditional funding and requiring a more innovative and risk-sharing approach to bring projects forward. One potential solution being a "lease wrapper" (a financial instrument that enables developers to invest in regional locations that may be unviable or too risky due to factors such as geographic isolation, economic uncertainty, or infrastructure challenges). By acquiring a long-term lease on a property or development site, assigning it to a third-party investor, and retaining a management role, developers can share the risk with the investor and access capital from sources that may not have been willing to invest in the region otherwise. This approach reduces the developer's risk, improves cash flow, and enhances credibility, while providing a return on investment for the pension fund or institutional investor.

04

Critical Success Factors

04 CRITICAL SUCCESS FACTORS

Critical Success Factors

OUR ANALYSIS HIGHLIGHTS MULTIPLE OPPORTUNITIES FOR FUTURE LIFE SCIENCES GROWTH ACROSS WEST YORKSHIRE WITH LOCATIONS OFFERING DISTINCT STRENGTHS AND WILL REQUIRE TAILORED REAL ESTATE SOLUTIONS TO UNLOCK ITS POTENTIAL. WE HAVE IDENTIFIED THREE KEY AREAS OF FOCUS THAT DEMONSTRATE STRONG POTENTIAL WINS IN THE SECTOR:

01

Leeds City Centre: A prime opportunity for Open Innovation and Clustering

Leeds City Centre emerges as the best-positioned location to develop a robust life science cluster, centered on open innovation and collaboration. With a high density of scientists, a diverse mix of life science companies, and existing clustering around the university, Nexus incubator, and the hospital, Leeds is well-placed to foster ecosystem growth. However, a critical barrier is the lack of "grow-on" lab space which is needed to support scalability, collaboration, talent attraction, and economic growth, driving long-term sustainability and success for companies and the wider cluster. It enables companies to adapt, innovate, and thrive, fostering a culture of entrepreneurship and knowledge sharing, and ultimately contributing to regional economic development and prosperity. While the upcoming 45,166 sq ft of development at the Old Medical School (OMS) offers promise, structural limitations to the building such as unit sizes capped at 4,000 sq ft, restrict the provision of larger spaces to attract larger businesses to the region or allowing businesses within Nexus or elsewhere to expand. The opportunities around the future phases of the Innovation Village need to be clarified in order to build upon the development of OMS. Addressing these challenges is crucial to fully realise Leeds' potential as a life science hub.

02

MedTech: An unmet Real Estate need across West Yorkshire

West Yorkshire's strong specialisation in MedTech presents an untapped real estate opportunity. While much of the sector's focus has been on high-specification lab spaces, MedTech companies often operate with leaner models and require more affordable, tailored spaces.

This segment is becoming an increasingly vital stakeholder in the healthcare ecosystem, yet their real estate needs remain underserved. Drawing from solutions in regions like Oxford and more recently Manchester, there is an opportunity to create purpose-built, cost-effective spaces that cater specifically to this growing sector. The "TechBox" solution, provides a unique solution for Life Sciences/Med Tech companies, offering a combination of offices, labs and manufacturing space under one roof.

They offer flexibility, scalability, and specialised infrastructure, while fostering collaboration into the design principles. This enables companies to navigate complex regulations, reduce costs, and increase competitiveness whilst being located within an existing ecosystem, rather than isolated within a typical industrial estate location which is more centered around road connectivity.

03

The Case for dedicated incubators in Bradford and continued development of NHIC in Huddersfield

The current lack of dedicated life science incubators in Bradford and Huddersfield is a notable gap. Leeds has demonstrated the critical role of incubators, such as Nexus, in supporting early-stage companies and fostering innovation. Establishing similar facilities in Bradford and Huddersfield would help attract start-ups, leverage existing talent and build momentum toward creating thriving local ecosystems. A walkable location is critical for incubator facilities to enhance community engagement. When deciding where to locate a new incubator facility, prioritising walkability over a remote location is essential. A walkable location attracts more people, increases accessibility, and fosters community engagement, while also improving company retention and attracting top talent. This leads to a more vibrant and supportive environment. This issue is being addressed in both with the development of the NHIC in Huddersfield and within Bradford the opportunity to further develop the offering under the BREE banner, linked with the Bradford Digitisation Hub and DHEZ. These future developments have the potential to drive Life Sciences growth within the area.

In summary, the West Yorkshire life science sector holds significant growth potential. By addressing specific real estate needs, fostering clustering and investing in targeted incubator development, the region can solidify its position as a competitive player in the UK's life science landscape.

04 CRITICAL SUCCESS FACTORS

01 / Leeds City Centre:

A PRIME OPPORTUNITY FOR OPEN INNOVATION AND CLUSTERING

To advance Leeds' position as a leading life science cluster, it is critical to focus on the promotion and development of key sites, such as the Leeds Innovation Village.

Identifying and collaborating with an experienced real estate investor / developer with long term vision will enable the delivery of essential "grow-on space," creating a seamless progression from the existing incubation facilities to larger spaces that support scaling companies. This expansion will enhance the clustering effect, attract more companies to the area and position Leeds as a regional and national advocate for life sciences. The forthcoming Old Medical School development is a step in the right direction, but strategic efforts must continue to address gaps in supply and support ecosystem evolution. The appointment of a dedicated asset manager would be suggested, or the use of a commercial broker in order to help draw the right companies across the globe to the ecosystem.

One of the key challenges remains developer hesitation, often due to the lack of robust market data on rent levels and demand. Public-private partnerships (PPPs) and attractive financial incentives, such as green loans or subsidised leases, could play a transformative role in encouraging investment. Fast-tracked planning approvals and proactive government support will further de-risk development and make projects more financially viable.

POTENTIAL DEVELOPERS

KADANS Science Partner

Pioneer

bruntwood SciTech

Mission St/

CASE STUDY:

GLASGOW - HEALTH INNOVATION HUB

The collaboration between the University of Glasgow, Kadans Science Partner and Scottish Enterprise exemplifies the power of PPPs in overcoming market challenges. Through strategic support, the local government provided an attractive leasehold arrangement that enabled Kadans to deliver a 65,000 sq ft Health Innovation Hub in Govan. By securing a pre-let agreement with the University of Glasgow for half the space, the project achieved financial feasibility while fostering collaboration among academia, industry, and clinicians. Leeds can draw lessons from this model to create a similar partnership framework, ensuring that innovation-driven developments are financially sustainable and strategically impactful.

02 / MedTech:

AN UNMET REAL ESTATE NEED ACROSS WEST YORKSHIRE

West Yorkshire hosts 300 MedTech companies, which is over 50% of its life sciences ecosystem.

However, these companies are dispersed across the region, often operating out of owner-occupied facilities or retrofitted warehouse spaces due to the lack of dedicated commercial infrastructure. Addressing this gap requires the introduction of TechBox developments–flexible, hybrid industrial spaces that integrate laboratory, office, and manufacturing facilities in self-contained units.

The barriers to delivering TechBox units are significant, both geographically and occupationally. Developers tend to focus on established clusters like the Golden Triangle, where occupier demand and rental returns are more predictable. However, West Yorkshire has the potential to unlock this market by leveraging its emerging life science clusters to create viable locations for such developments. Building these facilities within established hubs ensures companies benefit from the collaborative environment, networking opportunities, and access to talent that drive innovation.

TechBox models, proven in Oxford, Cambridge, Manchester, and Liverpool, demonstrate the success of tailored, design-led spaces that meet evolving occupier demands. These spaces attract a broader range of tenants by offering flexibility and fostering collaboration within vibrant ecosystems. Developing TechBox infrastructure in West Yorkshire's clusters could catalyse MedTech innovation and growth while addressing occupiers' changing space requirements.

The strategic delivery of TechBox developments will not only elevate demand but also integrate companies into a cohesive community, amplifying their access to resources, partnerships and networks.

POTENTIAL DEVELOPERS

MEPC

COLUMBIA THREADNEEDLE INVESTMENTS

GEN TWO

SCARBOROUGH GROUP INTERNATIONAL

network space
Better places for business

CASE STUDY:

TECHBOX - NEBULA

Nebula TechBox development in Oxford showcases a successful approach to flexible, hybrid industrial spaces. Currently under construction, the development comprises seven units across three buildings, with sizes ranging from 6,082 sq ft to a single building of 26,458 sq ft. Each unit is designed with modern occupier demands in mind, featuring a fitted reception/lobby area and CAT A-fitted offices. Nebula development demonstrates how tailored, scalable facilities can attract a diverse pool of occupiers, providing a template for similar developments in emerging life science clusters like West Yorkshire.

04 CRITICAL SUCCESS FACTORS

03 / The Case

FOR DEDICATED INCUBATORS IN BRADFORD AND CONTINUED DEVELOPMENT OF HUDDERSFIELD

Expanding incubator space at the University of Bradford and the University of Huddersfield is crucial for growing their respective life sciences ecosystems alongside Leeds.

Both universities are central to their respective ecosystems, with Bradford's Digital Health Enterprise Zone (DHEZ and BREE) and Huddersfield's focus on Health & Wellbeing and MedTech. Increasing incubator space will support innovation, attract investment, and retain talent by providing essential infrastructure for start-ups and spin-outs. This expansion would also foster collaboration, enhance the universities' roles as innovation hubs, and help overcome current challenges such as limited funding and access to office and lab space, ultimately strengthening West Yorkshire's regional life sciences market.

Progress is already well underway within Huddersfield, which has the established business incubator at The Glass Box and 3M Buckley Innovation Centre (3M BIC) providing a mixture of office and laboratory spaces (79-1717 sq ft) alongside business support services. This is now complimented by the development of the Emily Siddon Building, which has earmarked up to 5,588 sq ft of small office and lab suites, alongside associated co-working, meeting room and event space. Whilst small in size, this pilot facility will be integral in demonstrating the evidence basis which will underpin future development at NHIC. Attracting high growth companies within the Health & Wellbeing and MedTech related sectors will provide a natural complementation to Leeds, which has more of a focus towards Digital Health and Acute care.

Whilst Bradford has existing space which can be offered to growing businesses, it is struggling for occupancy. An internal review of space utilisation (and value to external companies) within the campus is being undertaken currently, which will provide an opportunity to identify a new potential incubator space or consolidate existing offerings into one central location. Potential partnerships could be identified with private sector incubator operators, to help deliver more space to encourage spin out activity.

POTENTIAL INCUBATOR OPERATORS

Quick Labs
Science Innovation Hub

+X Plus X Innovation

CASE STUDY:

ALDERLEY PARK

Alderley Park (owned and managed by Bruntwood SciTech), is a premier science and innovation campus in Cheshire, UK. It hosts over 250 companies and 4,000 professionals in science, technology, and innovation sectors. The campus is renowned for its state-of-the-art facilities, including the Life Science Accelerator and the recently launched Female Founders Incubator.

The incubator space at Alderley Park is designed to support early-stage companies, particularly in the life sciences and tech sectors. It offers flexible open access lab and office spaces and specialist equipment with associated lab technician support, all within a collaborative environment that fosters innovation and growth.

West
Yorkshire
Combined
Authority

CBRE

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REPORT TITLE: Our Cultural Heart, part of the Huddersfield Blueprint,

Phase 1 Food Hall

Cabinet date	**24th March 2026,**
Cabinet Member	**Cllr Graham Turner (Finance and Regeneration)**
Key Decision **Eligible for Call In**	**Yes** **Yes**

Purpose of Report

This report builds on the approvals and delegations previously given by Cabinet, most recently in September 2025, and seeks permissions associated with the food hall in Phase 1 including drawing down further funding for the fit out.

Recommendations:

1. **Phase 1 Food Hall Tenant/Operator**
   That Cabinet delegate authority to the Executive Director of Place, in consultation with the Service Director Finance, the Service Director – Legal, Governance and Commissioning and the Portfolio Holder for Finance & Regeneration to conclude the food hall tenant/operator selection process (options are lease, management agreement or direct operation by the council) to determine the best outcome for the council. Where third parties are to be used under a lease to negotiate and agree the terms of the lease or if there is a management agreement procure (for a management agreement), negotiate the contract terms and award the contract(s). This delegation shall include any grant of a lease at an undervalue if appropriate.

2. **Phase 1 Food Hall Contract**
   That Cabinet delegate authority to the Executive Director or Place, in consultation with the Service Director – Legal, Governance and Commissioning and the Portfolio Holder for Finance and Regeneration to approve the commencement and award of a concession contract or a management services contract under the Procurement Act 2023 in accordance with the Council's Procedure Rules.

3. **Phase 1 Food Hall Fit Out**
   That Cabinet delegate authority to the Executive Director of Place, in consultation with the Service Director Finance, the Service Director – Legal, Governance and Commissioning and the Portfolio Holder for Finance & Regeneration to procure and award the necessary contract(s) to complete the food hall fit out.

4. **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, Cabinet approve the extension of the services being provided by the external Client construction delivery team (SDP, architect and the engineer) to progress the Phase 1 food hall fit out. The same delivery team is

providing the necessary services on Phase 1, Phase 2, the retail demolition and the rest of the feasibility work on the master plan.

5. **Our Cultural Heart Committed Expenditure**
   That Cabinet approve the further draw down of £3.0m from later phases of the OCH programme to fund the food hall fit out thereby increasing the committed expenditure for Phase 1 from £58.370m to £61.370m and for the overall programme from £136.983m to £139.983m. Cabinet is asked to note the potential revenue implications of the operation of the Food Hall, as described in the Private cabinet report, taking into account the current offer and using the latest available PWLB rates for borrowing.

6. **Agreements and Executing Documents**
   That Cabinet delegate authority 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 food hall.

Reasons for Recommendations:

At the outset of the Our Cultural Heart programme it was determined that at key points in the development delivery process the programme would be brought back to Cabinet to consider the recommendations and decide the future direction.

The delegations have been recommended so that progress can be maintained and the operating model selected so that the Phase 1 food hall that is an integral part of the overall master plan can become operational in a timely manner.

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 approved at Cabinet. 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 a fund has previously been set up to cover these internal staff costs associated with the construction delivery.

The additional £3m funding requested in this report will be allocated from later phases (Phase 5) of the Capital Development Budget for project management, design and contractor costs (Construction Budget). See Section 2.2 for details of the fit-out feasibility budget.

This additional expenditure will increase the capital costs for the council and bring programme borrowing costs forward. See Section 3.2, Financial Implications.

The human resource and financial implications associated with this report are set out in more detail in sections 2.2, 2.3, 2.4, 3.2, 3.3, 3.4 & 4.

Date signed off by the Executive Director for Place	**David Shepherd, 16.03.2026**
Is it also signed off by the Service Director for Finance?	**Kevin Mulvaney, 16.03.2026**
Is it also signed off by the Service Director for Legal Governance and Commissioning?	**Samantha Lawton, 16.03.2026**

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 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, 3, 4, 5.

Has GDPR been considered? Yes, no public information is contained

1. Introduction

Huddersfield Town centre is undergoing a transformation shaped by the Huddersfield Blueprint. Our Cultural Heart is proving to be a catalyst for this wider investment and is now reaching its first delivery milestone with the completion of Phase 1 happening this year.

It is widely recognised that stimulating economic growth is vital, to not just create opportunities for residents but increasingly to attract new businesses and generate additional income for the council that can help meet the increasing cost of delivering local authority services.

Our Cultural Heart is a key part of the Huddersfield Blueprint. It supports many of the council's strategic social, economic, and cultural objectives by being a catalyst for change and regeneration in the town centre. It will create 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, many 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 two facilities are open 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 and has previously been considered on eight 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

2.1 Phase 1

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 Huddersfield Library Hub, including West Yorkshire Archive
- Food hall
- Public square/public realm
- Basement service areas.

The contract for Phase 2 is due to be awarded shortly and when Phase 1 becomes operational it will be separated from the Phase 2 works by a hoarding line.

See Appendix 1, Phase 1 & Boundary with Phase 2 (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 July 2026 followed by opening of the library and public square in summer 2026 with the food hall to follow in spring 2027.

Progress on site in the current period includes completing the roofs and external walls as part of making the buildings and basement watertight and progressing the internal works. At the same time external works continue including on the water feature and the public realm paving. However, whilst there is a lot of activity across the site in the last period the contractor has been delayed by four weeks and has received an extension of time for this period at no cost to the council.

The Clients construction delivery team continue to manage and monitor the progress of Phase 1 and report the same to the monthly Our Cultural Heart Programme Board meetings.

2.2 Food hall

Together with the other assets within the master plan the food hall is an important part of the Our Cultural Heart offer contributing to achieving the council's strategic objectives and adding to the sense of community by creating a space for social interaction, collaboration and gatherings for families, friends and visitors alike.

The preferred operating model for the food hall is for the council to enter into a lease with an experienced food hall tenant and this process is ongoing, see Section 2.3 below.

The lease offer we are currently negotiating and progressing for the food hall includes a variation to the original food hall delivery concept and to facilitate this, further approvals as set out above are required from Cabinet if this proposal is to be adopted.

Initially it had been anticipated that the greater proportion of the food hall fit out costs would be funded by the incoming tenant with a contribution from the council, whereas the offer received includes for the council to carry out and fund all the fit-out costs. Therefore, to assist with the ongoing commercial negotiations this report requests authority to utilise up to a further £3.0m to fund the food hall fit out in addition to the £1m allowance already included in the Phase 1 capital budget. Under a lease, the operator will have responsibility for the repair, maintenance and day to day upkeep of the internal fit out – whilst under a direct operation or management agreement model the council, as landlord, will be responsible for repair and maintenance.

Whilst the commercial negotiation continues on the lease option this report also requests authority to be able to enter into a management agreement or for the council to operate the food hall itself if either of these options is ultimately deemed to offer better outcomes for the council. To support this, the council is currently undertaking a feasibility study of the alterative operating models to help understand the costs, benefits, risks and resourcing needs. A delegation has been included above to enable officers, in consultation with the Portfolio Holder to progress direct operation, or a Management Agreement if the council is unable to proceed with a lease agreement.

With the current lease offer this means that all three operating models (lease, management agreement and direct operation by the council) will require the council to fund, procure and award all the fit-out works including procuring a concessionaire operator or management services provider. If, however, through negotiation it transpires that the tenant is to undertake the fit out works these would be funded by the council.

This means that the additional £3.0m is now required to fund the fit-out whichever operating model is selected, and as such, approval is sought to transfer funds from Phase 5 and delegated authority is requested to be able to procure and award contracts for the fit out works.

A breakdown of the food hall fit out budget and the supporting detail is included as Appendix 2, Phase 1 food hall Fit Out Feasibility Budget (private) to change the current empty shell into an operating food hall.

It should be noted that as the proposal is that the council will fund the fit out works this means that the fit out will remain in the ownership of the council which gives greater flexibility during the current selection process and in the future.

To allow for the best possible timeline, considering the anticipated Phase 1 construction completion, this report requests delegated authority to determine the operating model for the food hall which is deemed to deliver the best outcome for the council.

2.3 Preferred Operating Model, Journey to Date and Commercial Position Update

As described above, the food hall is a core part of the Our Cultural Heart offer, it provides a 24,999 sq ft civic anchor within Phase 1 and is directly connected to the new library and public square, forming the social heart of the scheme. Once open it will act as catalyst - driving dwell time, activating the public realm, and supporting the local economy.

Since mid-2024, in the search for a food hall tenant/operator, the council has been advised by Milligan, a specialist urban regeneration business focused on delivering transformative interventions in town and city centres through development and asset management mandates.

Milligan’s commercial roles typically span strategy, leasing, operator selection, development interface and long-term asset performance optimisation and their senior team has delivered major regeneration schemes across the UK where food halls and experience led F&B have formed a core component of the tenant mix, including projects such as The Glass Works in Barnsley, and Camden Lock Market in London.

Milligan’s advice is from experience of structuring, negotiating and delivering food hall led regeneration within complex urban settings, with a clear understanding of commercial risk, operator behaviour and long-term performance.

A report from Milligan is attached as Appendix 3, Food Hall Operator Selection Update (private). Once negotiations have concluded, Milligan will prepare a final report including the commercials terms to enable the council to undertake relevant due diligence and reach a decision in the council’s best interest, subject to Cabinet approving the delegations in Recommendation 1 of this report.

2.3.1 Context

From the commencement of the operator selection process, the strategic objective has been consistent:

- Secure a high-quality private sector food hall operator
- Deliver a long-term traditional lease arrangement
- Transfer operational risk away from Kirklees Council
- Generate income
- Anchor Phase 1 of Our Cultural Heart (OCH) with a credible food hall concept

This aligns with the original operator selection advice, which identified a traditional lease as the preferred commercial model which was endorsed by Cabinet in September 2025, with a management agreement or direct operation as fallback options.

The options available to the council are:

- Direct operation: The council runs the food hall itself and takes all costs and risks.
- Management agreement: A specialist operator runs the food hall on the council's behalf, but the council carries most of the financial risk.
- Lease: A specialist operator leases the space and takes day-to-day operating risk.

The lease offer under negotiation is on the basis of the council funding and carrying out the food hall fit out – as such, all three options require the council to fund the internal fit-out of the food hall, including stalls, bars, furniture and finishes. This is an increase of £3m from what was reported at Cabinet in September 2025 as outlined in Sections 2.2 and 3.2.

2.3.2 Market Coverage

An extensive national and regional engagement exercise was undertaken commencing late 2024. A total of 24 operators were approached across three categories:

- Best-in-Class Destination Food Hall Operators (7)
- Regional Food Hall/Market Hall Operators (10)
- Event-Led/Hybrid Leisure Concepts (7)

The full list of operators engaged, and the outcomes are included in Appendix 3, Food Hall Operator Selection Update (private).

2.3.3 Conclusions, next steps and timescales

The operator selection process has been comprehensive and has demonstrated genuine market testing through both breadth of coverage and depth of negotiation. However, it has also confirmed current market realities:

- Limited operators prepared to commit capital and covenant in secondary markets
- High expectations the landlord will take on most of the risk
- Increased operator caution where regeneration phasing precedes full critical mass
- Although the food hall will generate income, it is not expected to generate a profit for the council until the medium to long term.

The following activities are currently underway:

- Liaison with a prospective operator to negotiate and finalise Heads of Terms for a lease
- Feasibility review of alternative operating models
- Early design development of the landlord-delivered fit out specification and subject to approval by Cabinet the detailed design and procurement will progress

When the Heads of Terms have been negotiated and finalised a report will be presented with the commercial terms and final recommendation so that the selection process can be concluded and the best option selected using the delegations requested in the Cabinet report (Recommendation 1).

If the lease is selected as the operating model work will then be undertaken to finalise commercial and legal documentation, and in parallel work will progress to procure a fit-out contractor with a target opening date in spring 2027.

If the decision to progress with a Management Agreement or Direct Operation is selected this is likely to impact and delay the current programme meaning spring 2027 would be the earliest opening.

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.

For matters covered by this report the fees associated with this team are included in the budgets for the food hall fit out.

2.5 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 (shell & core) remains BREEAM Excellent.

2.6 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 continues 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 Phase 1 construction contract on site in August 2024 BAM has 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 and is expected to go live during March 2026.

SV is an integral part of the food hall offer generating local jobs, procurement spend and kitchens, creating spaces where SME's and aspiring traders can flourish backed up with an evidenced-based approach that ensures measurable, sustainable outcomes. The SV proposals from the prospective tenant are set out in Appendix 4, Food Hall Offer (private) page 14.

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 25th February 2026, continues to acknowledge that Our Cultural Heart is a significant strategic investment priority commitment to deliver major long term sustainable regeneration for the borough.

The January 2025 Cabinet report stated that the assumption was that the food hall would run at net nil revenue cost to the council, and the September 2025 Cabinet report assumed a council contribution of £1m for the fit out. The engagement and negotiations, described in section 2.3, demonstrate that there has been a change in market conditions.

The impact of the current proposal will be up to £4m cost to the council for the fit out of the food hall. This is higher than the councils original £1m share which is included in the Capital Plan. With the increased cost to the council and the current commercial offer this proposal will have revenue impacts for the council and will need to be included in the refresh of the Council's Medium Term Financial Strategy and future budgets.

Negotiations continue with the prospective tenant to improve the income levels and therefore the council's revenue position.

The largest revenue impact will be in year 1 as the council will be incurring costs ahead of the food hall operating at capacity. This is normal on projects of this nature and it is possible that interest rates will fluctuate before borrowing is needed.

As the increased food hall fit out budget will be funded from the later phases of the Construction Budget this together with previous reallocation of budget will reduce further the funding currently available to deliver the venue and any associated car parking.

The feasibility study which is currently underway will consider potential costs and income profile of a direct operation or management agreement model, to enable a comparison with the lease model. This will be used to inform the conclusion of the selection process using the delegations requested in the Cabinet report (Recommendation 1).

For the overall master plan budget including the previously approved reallocations from the Construction Budget, see Appendix 5, OCH Master Plan Budget Summary (private), that sets out the construction budgets for each phase.

3.3 Capital Budgets

The current approved construction budget for Phase 1 from Gateway 3 (June 23) to completion of construction is £58.370m and the additional food hall fit out budget of £3.0m (subject to approval) would increase this figure to £61.370m.

For the breakdown of the food hall fit out budget developed by the SDP and the supporting detail see Appendix 2, Phase 1 Food Hall Fit Out Feasibility Budget (private) to change the current empty shell into an operating food hall.

The previously approved committed construction expenditure for the overall programme is a total of £136.983m (adjusted from £137.185m in the September 2025 report) for the period up to October 2028 and this request would increase the approved committed figure to £139.983m.

3.4 Legal Implications

Legal Services continue to progress the other work streams as reported in earlier Cabinet reports but in the context of this report they and the external framework firm, are advising in the property letting process and contractual arrangements with food hall tenants and will similarly advise on the management agreement should it become the operating model for the food hall.

The Council must comply with its duty under the Public Services (Social Value) Act 2012 as noted in Section 2.6 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.

The proposals outlined in this report will be assessed by the Service Director, Skills and Regeneration for compliance with the Subsidy Control Act 2022 in accordance with Financial Procedure Rules 22.17 and 22 .18.

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. If the disposal is at an undervalue then the General Disposal Consent 2003 may be relevant to provide deemed consent of the secretary of State if the undervalue is less than £2m and the disposal is likely to achieve the promotion of economic wellbeing, social wellbeing or environmental wellbeing of the area or persons resident in it.

3.5 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.

3.6 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 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.

There is a risk that whilst the lease option is the preferred operating model for the food hall that the prospective tenant offer and the subsequent outcome of negotiations with them may be deemed to be unsuitable. To mitigate this risk two alternative options to (1) operate the food hall under a management agreement or (2) for the council to operate, are being developed. The risks with each of these options is set out in Section 2.3. However, there are also risks associated with the direct operation and management agreement model including procuring a provider under the Procurement Act 2023.

With regard to the overall programme, subject to budget being reallocated and not being replenished or alternative sources of funding being found, the full master plan cannot be delivered without modifying the scope.

There is a significant risk that irrespective of the operational model chosen that the operation of the food hall will require long term base budget funding from the council.

3.7 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 6 (public).

4. Consultation & Engagement

The concept for the food hall was determined at the outset of the programme and through consultation during the master plan planning process, and this report focuses on delivery, therefore current consultation is with council colleagues to determine the best outcome for the council.

More broadly, with regard to master plan programmes of this scale they will continue to require regular engagement and consultation at various stages of the programme development and delivery of phases.

5. Options

The food hall is a core part of the Our Cultural Heart offer contributing to achieving the council's strategic objectives and adding to the sense of community by creating a space for social interaction, collaboration and gatherings for families, friends and visitors alike.

The work undertaken as set out in Section 2.3 has shown significant market engagement and interest, but market conditions demonstrate operators are now not prepared to commit capital and expect the landlord to take on a greater level of cost and risk, especially when phasing and wider regeneration works are underway.

As discussed in sections 2.3 and 3.6 there are three options for the delivery of the food hall (Lease, Management Agreement, Direct operation by the council) – all involve the council carrying out the fit out and require the budget of up to £4m.

The food hall will deliver significant benefits to the town, and to ensure those benefits are realised the option of the council funding the fit-out costs of up to £4m is the recommended way forward. Approval at this stage is required to allow fit-out design and procurement to run in parallel with the final stages of Phase 1 construction.

Subject to the outcome of negotiations being successful the lease option is the current recommended option for the reasons outlined in previous reports, it would provide for less of delay and minimise any immediate reputational risks. If it is deemed there is no longer a viable lease option available that provides value for money, commercial feasibility and is in the council's best interest, direct operation or a management agreement will be progressed.

Approving the recommendations in this report protects the council's investment in Phase 1, ensures the food hall opens as soon as practically possible, and secures a credible, deliverable operating solution in challenging market conditions.

6. Next steps and timelines

The new Huddersfield Library Hub including the home for the West Yorkshire Archive Service in Kirklees together with the public square and its events programme will open in late summer 2026.

Subject to Cabinet approval, the council will progress to conclude the operating model during spring 2026 so that the fit-out works can commence later this year, with the food hall expected to be operational in spring 2027. With the other operating model options spring 2027 would be the earliest opening date.

7. Contact officer

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Senior Responsible Officer, Our Cultural Heart
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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

- **September 2025 –** Cabinet Report – Our Cultural Heart, part of the Huddersfield Blueprint – Phase 2 Gateway 4
  https://democracy.kirklees.gov.uk/documents/s66104/Signed%20Final.%20Our%20Cultural%20Heart.%20Cabinet%20Report.%209.9.25.pdf

9. Appendices

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 & Boundary with Phase 2 (public)

- App 2. Phase 1 Food Hall Fit Out Feasibility Budget (private)
- App 3. Food Hall Operator Selection Update (private)
- App 4. Food Hall Offer (private)
- App 5. OCH Master Plan Budget Summary (private)
- App 6. Final. 220519 IIA stage-2 v3_Redacted (public)

10. Service Director responsible

David Wildman
Skills & Regeneration
david.wildman@kirklees.gov.uk

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PHASE 1

FOOD HALL
LIBRARY
HOARDING TO PHASE 2 & RETAIL DEMOLITION
Queensgate

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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

Calculated Scores							Stage 2 Assessment
Proposal	Theme	Impact	P + I	Mitigation	Evidence	Overall	Required
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

					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.

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

					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

		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

					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

		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 (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

		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

					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.

	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.

C) Environmental Impact – Evidence from Engagement

	CONSULTATION WITH KEY STAKEHOLDERS			COMPLETE THIS DETAIL DONE YOUR	WHEN YOU HAVE 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					

D) Environmental Impact – Action Planning

Enviornmental	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.

		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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Report title: 2026/27 Proposed allocation of funding from the Children and Families Directorate, Learning and Early Support Schools Capital Maintenance baseline section of the Capital Plan.

Cabinet date	**24th March 2026**
Cabinet Member	**Finance & Regeneration (Corporate Landlord) - Cllr Graham Turner** **Children's Services - Cllr Viv Kendrick** **Education – Cllr Jane Rylah**
Key Decision **Eligible for Call In**	**Yes** **Yes**

Purpose of Report

This report will identify potential capital projects, for Member approval, to be funded from the 2026/27 Learning and Early Support Capital Maintenance baseline section of the Capital Plan to address urgent condition and Health and Safety (H&S) related needs in maintained schools. It will ask for delegated powers in line with the Council's Financial Procedure Rules to enable officers to manage and deliver the large and complicated programme within its budget envelope.

Recommendations

Cabinet is requested to:

- Agree the business case at **Appendix A** which outlines the rationale for the schools' condition and H&S works programme, the availability of funding, the selection process and the main categories of work, thereby enabling the projects concerned to be designed, procured and implemented.

- Agree the detailed list of proposed condition and H&S related works in maintained schools for 2026/2027, which is attached at **Appendix B.**

- Agree the delegated powers to the Executive Director for PLACE and/or Service Director – Development as detailed in paragraphs 2.11 - 2.12 of this report in order to aid the management of the schools' baseline condition and H&S programme.

- Agree the delegated powers to the Executive Director – PLACE to procure and award contracts arising from this programme of works and to authorise the Service Director – Legal, Governance and Commissioning to enter into the necessary contracts / legal documents in accordance with the Council's Contract Procedure Rules.

Reasons for Recommendations

This vital schools' condition programme will address urgent Health & Safety related capital condition works across the maintained schools' portfolio and will help ensure that they remain safe, dry, warm and secure, ensuring positive outcomes for children both now and in the future.

Resource Implication: The capital works within the programmes identified in this report are funded through government grant.

Date signed off by Executive Director & name.	**David Shepherd (Place) – 09/03/2026**
Is it also signed off by the Service Director for Finance?	**Kevin Mulvaney – 13/03/2026**
Is it also signed off by the Service Director for Governance and Commissioning?	**Samantha Lawton – 13/03/2026**

Electoral wards affected: **All**

Ward councillors consulted: **No**

Public or private: **Public**

Has GDPR been considered? There are no GDPR implications relating to this report.

1. Executive Summary

1.1 This report will identify potential projects to be funded from the Learning and Early Support Capital Maintenance baseline section of the Capital Plan approved by Council on 25th February 2026. This funding is used to address urgent condition and H&S related needs in maintained schools. Academies and Voluntary Aided Schools have access to their own capital funds through their Responsible Bodies.

1.2 Members will be asked to agree the Schools Capital Maintenance programme with the proposed named schemes as detailed in **Appendix B** so that they can be delivered in financial year 2026/27 and to agree the proposed delegated powers in line with the Council's Financial Procedure Rules and Contract Procedure Rules to enable officers to manage and delivery this large and complicated programme within its budget envelope.

2.0 Information required to take a decision

(a) Background

2.1 In May 2025 the Department for Education (DfE) announced a Schools Condition Capital grant allocation for 2025/26 of £3.576M for Kirklees. This level of grant was also deemed to be indicative of the allocation for the Authority for 2026/27, subject to future confirmation by the Department in spring 2026.

2.2 The DfE revised the condition funding system and methodology used for their capital settlements in 2022/23, using new data from their National Condition Data Collection, and more up-to-date pupil numbers from the spring 2020 census. Weighted pupil numbers underpin funding calculations for the School Condition allocations. The numbers are weighted to reflect the different levels of floor area per pupil in different settings. We expect this same methodology to be used for future years' allocations but incorporating more up to date pupil number data.

2.3 Grant allocations from the Department are revised annually to reflect new or closing schools and where a school moves to a new responsible body (e.g. from Maintained to Academy status), in which case the pupil-led core condition funding will move with the school(s). Altogether, eleven maintained schools converted to Academy status in 2025/26. When setting the Council's Five-Year Capital plan, it was estimated that our grant

allocation for 2026/27 from the DfE would be £2.9M due to the reduced number of maintained schools remaining under Council control. In anticipation of the grant allocation being potentially of a higher value, priority reserve schemes will be designed at risk in preparation to be added to the programme at short notice using approved delegated authority should more funds become available. This also allows for flexibility should schemes in the main programme have to be delayed or postponed.

2.4 In addition to the original indicative allocation of £2.9M, in year 2025/26 re-profiling of funds totalling £135K was previously completed bringing the total budget approved at Council on 25th February 2026 to £3.035M.

(b) Capital Maintenance for schools – Proposed condition and H&S based projects 2026/27

2.5 It is proposed that the £3.035M budget allocation for 2026/27 will be distributed as follows:

Allocation	**2026/27 Capital Plan**
Urgent condition needs-based projects and Health & Safety works.	£2.350M
Essential fire safety works.	£0.240M
Essential physical adaptations work to improve accessibility.	£0.200M
Capital Plan preparation, advance surveys, feasibility studies, advance design, and condition surveys in relation to delivery of projects.	£0.150M
Risk pot for emergency additions to the capital plan in year / balance for high tenders and asbestos removal.	£0.095M
TOTAL	**£3.035M**

2.6 Attached at **Appendix A** is a business case that outlines the process for identifying the condition needs of individual schools, explains how the backlog of repairs is prioritised across all schools and how the 2026/27 schools' condition programme, if approved, will be designed, procured and implemented. In order to maximise spend on works it is proposed to manage asbestos risk via the main risk pot which will be carefully monitored throughout the year.

2.7 Following feasibility work undertaken by the Council's Technical Services; a prioritised list of urgent condition works required to be undertaken in schools during 2026/27 has been identified. This is attached at **Appendix B**. All of the works proposed have scored 28-30 on the matrix scoring system (described in **Appendix A**), indicating that a failure of the element concerned would have a major impact on the individual school from a Health and Safety and/or building closure and/or building damage perspective.

2.8 The proposed programme of works primarily consists of the following categories of work:

- replacement of life expired flat and pitched roofs.
- whole or partial school electrical re-wires (including lighting replacement schemes).
- replacement of obsolete boilers and heating distribution systems.
- urgent health and safety works including fire safety improvements and structural repairs.

2.9 In addition to the new condition and H&S works, the following activities are also proposed to be funded from the available capital grant:

- £150K to cover survey and preparation costs for the 2026/27 programme along with advance feasibility and design costs for the 2027/28 programme.
- £95K for a risk pot for items such as emergency in year additions to the programme, higher than anticipated tenders and unexpected asbestos discovered once works are under way.
- £200K to provide essential physical adaptations to school buildings / sites to enable pupils with disabilities / medical needs to access their local schools.

2.10 Currently, all schools that have a scheme of work within the approved programme are asked to make a funding contribution from their Devolved Formula Capital (DFC), which is a capital grant given to schools to maintain and improve their buildings. In 2025/26, the level of DFC received allowed for over £100K of additional works to be added into the annual programme. However, as with the Capital Maintenance grant, this fund is decreasing year on year due to schools moving to Academy status. The level of DFC contributions for 2026/27 is yet to be determined but will be added to the Capital Maintenance programme throughout the financial year, thereby enabling more projects to be undertaken.

(c) *Financial Delegations*

2.11 In order to aid the implementation of the baseline schools' condition programme for 2026/27 mentioned in this report, Members are requested to delegate authority in accordance with the Council's Financial Procedure Rule 3.9 dated June 2025 to the Executive Director for PLACE and/or Service Director – Development – PLACE Directorate to manage the implementation of the identified works within the respective agreed total programme budget and to:

• add new urgent projects to the 2026/27 programme without prior Cabinet approval providing that the total cost of the programme remains within the approved capital allocation set by Council and transfer resources to or from any unallocated resources within a programme area without restriction.

• Slip or delete projects in response to operational need and reallocate budget between projects during the course of 2026/27 providing that the total cost of the programme remains within the approved capital allocation to enable the effective management of the programme, especially during the exceptionally busy six-week summer break when the majority of these works will be delivered.

These delegations are additional to the general delegations set out in the Council's Financial Procedure Rules 3.9, dated June 2025, for Service Directors to:

- Transfer resources within a programme area without restrictions.
- Transfer resources between any project or programme area up to a maximum of £2,000,000 in any financial year.
- Transfer resources within programme areas between any year within the approved capital plan.

Subject to compliance with Financial Procedure Rules 3.10 and 3.11 and notification to the relevant Cabinet Member and appropriate Ward Members.

In order to ensure that the programme of works is delivered efficiently and effectively, delegated powers to the Executive Director – PLACE to procure and award contracts

arising from this programme of works and to the Service Director – Legal, Governance and Commissioning to enter into the necessary contracts / legal documents in accordance with the Council's Contract Procedure Rules will be requested.

2.12 Significant amendments to the approved programme under delegated powers will be reported to Cabinet through the Quarterly Financial Monitoring process or through delegated decision notices on the Council's website.

3. Implications for the Council

3.1 Council Plan

The Schools' Condition programme will ensure that we are getting the basics right by providing school buildings that are warm, dry, safe and secure within the constraints of a well-managed capital programme of investment. Projects undertaken will ensure that our schools are accessible to all including those vulnerable children and young people with disabilities. Carbon reduction will be central to our investment programme, ensuring that we can live in communities that thrive. Local and regional small and medium sized contractors will be able to tender for projects and provide supplies that will help drive economic growth.

3.2 Financial Implications

The Schools' Condition programme is funded from DfE capital grant and does not impact on the Council's Medium Term Financial Plan. Contributions towards the works are sought from each school's DFC, which is a capital grant provided by the DfE to schools for condition and suitability projects.

3.3 Legal Implications

The Council has statutory duties regarding the condition of maintained schools which are relevant to the allocation of capital maintenance expenditure (as defined in the CIPFA Code of practice for LA accounting). Section 543 of the Education Act 1996 requires the Council to ensure maintained schools are adequate for the purposes of education. The School Premises Regulations 1999 set out minimum standards for schools regarding condition, safety lighting, etc. Failure to comply would be a breach of statutory duty . In addition, Section 22 of the School Standards Framework Act 1998 requires the Council to maintain maintained schools compliant with statutory standards.

The Council must ensure its capital maintenance expenditure decisions are rational and reasonable in discharging these statutory duties having regard to H&S risks, statutory compliance, condition surveys and associated data and that H&S is prioritised. Failure to comply could result in legal challenge and or criticism from the DfE.

The Council has duties under Section 2 of the Health and Safety at Work Act 1974 to provide a safe working environment and therefore respond to H&S related needs in maintained schools.

The Council is required to comply with the Public Contracts Regulations 2015 and the Procurement Act 2023 after 24 February 2025 when procuring goods, works or services over UK thresholds and other procurement related legislation. The Council must also comply with its Contract Procedure Rules.

The Council has the power to enter into contractual arrangements set out in this report relying on Section 1 of the Localism Act 2011 and all other enabling powers.

3.4 **Climate Change and Air Quality**

The condition schemes identified in this report will ensure that we are replacing inefficient roofs, boilers, heating and electrical systems with modern, energy efficient materials and equipment that will contribute to an ever-reducing carbon footprint for the Council. For example, roofs will be repaired and insulated to modern standards, LED lighting and new ceilings will be introduced during rewire projects and heating distribution systems that are 40-50 years old will be replaced with new. These projects demonstrate the Council's commitment to investing in and managing its school estate to ensure that the Council's Carbon Neutral Vision is supported and enhanced.

3.5 **Risk, Integrated Impact Assessment (IIA) or Human Resources**

The Equality Act 2010 (Section 149) requires the Council to have due regard to the need to:

a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Act.

b) advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it.

An Integrated Impact Assessment has been carried out for the Schools Condition programme. The IIA considered that there are no adverse impacts arising from this proposal under the duty and the overall impact will be positive.

4 Consultation

4.1 This report has been subject to consultation with the Portfolio Holder for Corporate and the Portfolio Holders for Education and Children's Services. Portfolio Holders were very supportive of the proposals contained within this report and are content to support the recommendations and proposed delegation of powers.

4.2 Following approval by Cabinet, consultation will occur with the individual schools that are due to be part of the programme to discuss the scope of the works, proposed timings and decant options (where applicable) and this will continue throughout the year as the projects are developed, designed and implemented.

4.3 The Children's SEND Assessment and Commissioning team works closely with the Schools Asset Management team to identify pupils with disabilities / medical needs to ensure that their needs are being met where appropriate. This involves close consultation with the individual schools concerned and parents to ascertain and agree the level of "reasonable adjustments" required to the school's buildings and grounds, and to its day-to-day operations and curriculum.

5 Engagement

Not applicable.

6 Options

6.1 **Options Considered**

Not undertaking this programme of urgent condition works would lead to the potential closure of the schools if the relevant items failed, as well as causing significant damage and/or creating H&S issues within schools. It would also mean that the Council is not

complying with its statutory and regulatory obligations as outlined in Section 3.3 of this report.

6.2 **Reasons for recommended Option**

Undertaking the proposed programmes of work will help ensure that our maintained schools remain warm, dry, safe and secure, and the Council is meeting its statutory and regulatory obligations.

7 Next steps and timelines

Subject to approval of the proposed projects and final business case, the Council's Corporate Landlord and Capital Service will ensure that the 2026/27 Schools' Condition and H&S programme is updated, and the projects concerned are developed, designed, tendered, procured and implemented.

8 Contact officer

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David Martin - Head of Service for Property
Tel: 01484 221000 Email: david.martin@kirklees.gov.uk

9 Background Papers and History of Decisions

Cabinet report - 2025/26 Proposed allocation of funding from the Children and Families Directorate, Learning and Early Support Capital Maintenance baseline section of the Capital Plan – 10th June 2025.

10 Appendices

Appendix A: Final Business Case for the Capital Maintenance Schools' Condition programme.

Appendix B: Detailed list of proposed 2026/27 Learning and Early Support Capital Maintenance Schools' condition programme.

11 Service Director responsible

Joanne Bartholomew - Service Director – Development - Tel: 01484 221000
Email: joanne.bartholomew@kirklees.gov.uk

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FINAL BUSINESS CASE (Capital) **Appendix A**

Project Title:	Capital Maintenance for Schools – Condition Programme
Project Manager:	David Martin
Client Service:	Learning & Early Support
Date of this OBC:	March 2026
KMC Capital total (Gross) (£000s):	**£3.035M**

DESCRIPTION

Description of the project and its purpose:

The Capital Maintenance for Schools grant is provided to all Local Authorities by the Department for Education (DfE) for expenditure on maintained schools to ensure that:

- buildings and equipment are properly maintained.
- health and safety issues are addressed and.
- a backlog of repairs does not build up over time.

In addition, Kirklees uses the funding to ensure that where required, schools are accessible for pupils with disabilities / medical needs and that appropriate specialist equipment such as stair lifts are provided to meet the needs of individual pupils. Since FY 2011/2012 Councils have been expected to fund physical adaptations to schools from the Capital Maintenance grant provided to all LAs. Specialist equipment will, wherever possible, be funded from revenue and only be capitalised as a last resort.

On 25th February 2026, the Council approved a Multi-Year Investment Plan, which included proposed funding under Capital Maintenance for Schools totalling £3.035M, consisting of £2.9M for the main FY 2026/27 allocation and £135K of grant funding re-profiled from FY 2025/26. A DfE grant announcement will be made in Spring 2026 confirming the final total grant allocation, which may be larger than the above.

A programme of urgent condition works in schools totalling £2.590M is proposed. The key categories of works are:

- a programme of urgent and essential repairs to replace leaking and life-expired pitched and flat roofs. Incorporated into these works are enhancements or in some cases the introduction of insulating material, which greatly improves the thermal efficiency of the roof. This contributes to a reduction in the building's carbon footprint through lower energy usage. In the case of pitched roofs in Victorian schools it includes, where necessary, essential repairs to lath and plaster ceilings using a chicken wire and timber batten technique above the suspended ceiling. This greatly reduces the risk of old plasterwork falling through the suspended ceiling. These works also include replacing the existing suspended ceiling grid and luminaries with new energy efficient recessed lighting, which greatly enhances the teaching and learning environment for pupils and staff through an improved quality of lighting, whilst simultaneously contributing to lowering the building's carbon footprint and running costs.
- a programme of whole school electrical re-wiring projects to replace life expired existing systems and to comply with the latest legislative standards. As well as full replacement of the electrical wiring systems, these projects have the added benefit of providing new ceilings and modern, energy efficient LED lighting which provide the schools with a fresh look and greater energy efficiency. Where appropriate, these projects also incorporate improvements to ICT infrastructure e.g., enhancement or rationalisation of data point coverage and the replacement of the existing fire alarm and/or lightning protections systems and provides the opportunity to manage asbestos to support ongoing maintenance of building fabric and other services.
- replacement of inefficient and obsolete boilers with energy-efficient boiler plant and/or the replacement of inefficient heating distribution systems, with low surface temperature radiators providing better control. These works can also have a positive impact on the working environment for pupils and staff as they lead to the provision of heating that better matches an individual school's requirements, reducing energy wastage and utility costs and contributing to meeting the Council's carbon reduction targets.
- a programme of essential fire safety & compliance works in schools arising from Fire Risk Assessments carried out by the schools/Local Authority and H&S inspections.

In addition to the H&S programmes, there is an allocation of £150K for preparation costs for the FY 2026/27 and 2027/28 capital plans. These costs include feasibility studies / asbestos surveys / condition surveys / advance design in relation to the preparation and implementation of projects.

- There is an allocation of £95K to act as a risk pot for emergency schemes that may emerge as the financial year progresses. As the backlog of repairs exceeds the availability of capital, it has only been possible to fund projects with a matrix score of 28-30. Inevitably, there is a risk that schemes that miss the programme cut may deteriorate during the course of FY 2026/27 prompting the need to bring some projects back into the programme in order to tackle serious H&S issues or potential school closures. The risk pot also covers unexpected discoveries of asbestos on site once works have started and the impact of increased construction inflation on material costs.

- An allocation of £200K is provided to cover disability access schemes not yet identified. In all schools the Head teacher and governing body are asked to consider if reasonable adjustments to how they deliver the curriculum can be made without the need to undertake physical adaptations. In addition, consideration is given as to whether specialist equipment can meet the needs of the individual. Where physical works are required, consideration is given to minimising the level of works required to that which would be considered to be “reasonable.” In all cases, the works identified are either required to enable the admission of pupil(s) to the school chosen by their parents / carers from the start of the new academic year in September 2026 or are required to meet the needs of schools where pupils have already been admitted but where adaptation works have subsequently been identified. Works to schools will have wider benefits for staff, visitors and the local communities by increasing the accessibility of the buildings and grounds for all.

Allocation methodology for condition funding

Every school receives a condition survey covering internal and external fabric, mechanical and electrical services, as well as external areas on a planned rolling five-year programme. All surveys are undertaken by the Council using external consultants and are funded through a combination of the Schools Traded Service for Repairs and Maintenance and the Learning & Early Support Schools Condition programme.

The information collected is stored on the Council’s K2 Asset Management database and is used to set the Council’s capital investment plan for schools, as well as being used by schools themselves to prioritise expenditure from their revenue Repair and Maintenance budgets and their Devolved Formula Capital allocations.

All surveys are based on the DfE’s condition surveying methodology, which has been in operation since 2000. The methodology allocates a condition and priority to each individual element using nationally agreed DfE stipulated grades as follows:

GRADE	MEANING
A	Good - Performing as intended and operating efficiently.
B	Satisfactory - Performing as intended but exhibiting minor deterioration
C	Poor - Exhibiting major defects and / or not operating as intended
D	Bad - Life expired and / or serious risk of imminent failure.
Priority 1	Urgent work that will prevent immediate closure of the premises and / or address an immediate risk to the health and safety of occupants and / or remedy a serious breach of legislation.
Priority 2	Essential work required within two years that will prevent serious deterioration of the fabric or services and / or address a medium risk to the health and safety of occupants and / or remedy a less serious breach of legislation.
Priority 3	Desirable work required within three to five years that will prevent deterioration of the fabric or services and / or address a low risk to the health and safety of occupants and / or remedy a less serious breach of legislation.
Priority 4	Long term work outside the five-year planning period that will prevent deterioration of the fabric or services.

This results in each element of a school building and its grounds receiving a grade that indicates its current condition and life expectancy e.g. A 35-year-old boiler might be rated D1 which indicates that the item is life expired and in urgent need of replacement whilst a five-year-old boiler might be rated A4, which means that it is in a good condition and needs no major investment in the next five years.

As the backlog of repairs exceeds the capital available, a matrix scoring system is used to prioritise the backlog of urgent priority 1-3 works, considering issues such as health and safety, the remaining life of the element and the impact of a failure on the building. Each of the three categories is allocated a maximum of 10 points, which produces a maximum score of 30 points. The elements with the highest scores are considered for the condition programme. In using the above system, it can be demonstrated that the programme of works identified represents the most urgent and highest priority repairs for the Council.

A weighting system is employed to give greater importance to some types of repairs than others. Elements that receive a weighting are mechanical services, electrical services, roofs and external walls. Where the number of schools with a matrix score of 26 – 30 exceed the financial resources available, officers prioritise the programme according to the asbestos risk, continuation of previous phases, and links between mechanical & electrical works.

Weightings are not allocated to fixed furniture, external areas, redecoration, sanitary services and internal walls and doors. These areas are often prioritised by schools using their own DFC funds.

What are the benefits / critical success factors?

The Capital Maintenance for Schools baseline condition and H&S programme will help reduce the backlog of priority maintenance in Kirklees community / voluntary controlled / foundation / trust schools.

It will contribute to addressing a key priority for the Directorate for Children's Services, which is to ensure that all schools are warm, dry, safe and secure.

Many of the projects being implemented will have a direct impact on reducing the Kirklees carbon footprint – all new roofs will incorporate significantly improved insulation; new boilers will be modern, energy efficient equipment with the latest TREND controls; re-wired buildings will contain LED energy efficient lighting with significantly improved controls including movement sensors and dimming switches.

The programme is designed and procured to ensure that all schools re-open without loss of teaching days where physically and organisationally possible. Health and Safety concerns will always be taken into account before reopening a school after the summer works period.

FINANCE

KMC **Gross** Total (including external/grant funding if applicable) (£000):

Profile: Year | 26/27

Sum **£3.035M**

Funding for this section of the Capital Plan comes from the Capital Maintenance for Schools grant, which is not a ring-fenced capital grant, provided by the DfE for Councils to improve and maintain the condition of their schools' estates.

Lifespan of assets

New boilers fitted should have a life of 15-20 years, whilst new heating distribution systems should last 40-50 years. New flat roofs will have a lifespan of 15-30 years depending on the materials used (e.g., felt, asphalt, EPDM) whilst pitched slate roofs can have a life expectancy of 50-100 years+. Rewired electrical systems are expected to have a life of 25-40 years. This will be dependent of an appropriate planned regime of inspection/servicing/repair being carried out by schools and the Local Authority.

Lifecycle Capital costs (during the lifetime of the asset):
It is recognised that there are life cycle capital costs associated with this programme of works. All the roofs, boilers, electrical systems etc. installed will require ongoing maintenance and eventual replacement. All elements of a school building and grounds are covered by condition surveys co-ordinated by the Schools FM team in conjunction with Corporate Landlord Compliance team. All condition related data is stored on the Council's K2 Asset Management system and is used to prioritise works for future capital replacement projects.

Responsibility for the lifecycle costs of this programme rests with the schools and the Council. Schools undertake significant capital repairs / replacement works from their DFC and their own revenue budgets. The Council undertakes capital works in schools using the Capital Maintenance Grant provided by the DfE.

Revenue Implications
Increased levels of insulation in new roofs, the installation of energy efficient boilers, the introduction of energy saving lighting and other devices and the greater use of sustainable technologies should have a positive impact on school running costs by reducing energy usage and therefore bills. These works should also reduce school maintenance costs in the short term by providing new assets, though schools will need to ensure that appropriate revenue budgets are set in the medium and long term in order to maintain the new assets properly. Due to the way that the Kirklees LMS scheme operates any revenue savings will accrue to the individual schools rather than the overall Dedicated Schools Grant.

DELIVERY & MANAGEMENT

How will the project be delivered/managed?

Delivery & Management.
Design and delivery of the Capital Maintenance programme is the responsibility of the Council's Technical Services. Within the Schools Facilities Management Team, the Asset Manager (Schools) and Asset Management Officers will act as a key link between schools and the allocated surveyor / external framework consultant / external framework contractor / Technical Advisor / Project Manager (the actual combination will be dependent on the procurement route for each individual project) to ensure the delivery of each scheme at an operational level. The Head of Service for Property will act as the Council's overall Project Executive.

How will the Programme/Project impact on hard-to-reach groups?
All sections of the community will benefit from improvements to their local schools including hard to reach groups such as lone parents, traveller families and minority ethnic groups as well as pupils with physical disabilities.

Is this subject to OJEU Regs?
None of the projects are individually large enough to fall under OJEU Regulations. Most projects will be tendered but where projects are delivered via Framework Agreements, these agreements will have already been subject to the full OJEU process.

How will this be procured:
This programme of works will be delivered through the Council's Technical Services. Works delivered externally by contractors will be tendered; or will be negotiated if delivered by KHN (Kirklees Homes & Neighbourhoods). We will also negotiate with private contractors on multi-phased schemes where contractors have performed well on the first phase of works – management of the procurement process will be through the Capital Delivery team.

Key risks in undertaking / not undertaking this programme/project:

This programme contains urgent condition items relating to school buildings (e.g., roof repairs; boiler replacements; whole school electrical rewires; H&S works etc.) that could, if not tackled, lead to damage to the buildings, H&S risks to the building occupants and the potential partial or full closure of schools, which would impact on the educational attainment of young people.

In running this large and varied programme, we encounter many risks including:

- There are some larger schemes (e.g., whole school re-wires or projects that combine different disciplines e.g., boiler replacement combined with a whole school re-wire) which will be complicated to deliver due to programming issues; availability of decant space etc.
- Many schemes will need to be undertaken during the summer holidays due to the nature of the works e.g., the replacement of a slate roof on a Victorian School and therefore any potential slippages could have serious consequences.

OTHER INFORMATION

Key Contacts

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PROPOSED ALLOCATIONS TO 2026/27 LEARNING AND EARLY SUPPORT CAPITAL MAINTENANCE PROGRAMME APPENDIX B

Project	Ward	Expected Total Cost of Project
LEARNING & EARLY SUPPORT CAPITAL MAINTENANCE PROGRAMME 2026/27 - CONDITION AND H&S PROJECTS		
2026/27 Capital Plan preparation costs - Advance Surveys/feasibility studies/asbestos surveys/condition surveys costs in relation to the delivery of Children's Service projects and advance design of projects for the 2027/28 programme.	Various	£150,000
Risk Pot for emergency additions to the Capital Plan/balance for high tenders/asbestos	Various	£94,750
Birkby I & N School - Phase 2 rewire	Greenhead	£105,500
Dalton School - Phase 1 Heating distribution replacement	Dalton	£141,600
Farnley Tyas CE(VC) First School - Fire alarm and emergency lighting	Kirkburton	£18,000
Headlands CE (VC) J I & N School - Phase 3 roofing works	Liversedge & Gomersal	£48,750
Highfields Modular Building - Demolition	Greenhead	£10,000
Hinchliffe Mill J & I School - Lighting replacement	Holme Valley South	£80,000
Hinchliffe Mill J & I School - Fire alarm	Holme Valley South	£21,000
Holme J & I School - Lighting replacement	Holme Valley South	£55,000
Lydgate J & I School - Phase 2 lighting replacement (Main building)	Batley East	£89,000
Meltham CE (VC) Primary School - Boiler replacement	Holme Valley North	£135,800
Norristhorpe J & I School - Phase 2 roofing works	Heckmondwike	£232,750
Ravensthorpe CE(VC) Junior School - Phase 1 lighting replacement	Dewsbury West	£68,000
Savile Town CE(VC) I&N School - Boiler replacement	Dewsbury South	£129,800
Slaithwaite CE (VC) J & I School - Phase 1 roofing works	Colne Valley	£126,700
Thornhill Lees CE(VC) I&N School - Phase 1 lighting replacement	Dewsbury South	£85,000
Various Schools - Disabled adaptations	Various	£200,000
Various Schools - Fire safety works	Various	£156,000
Warwick Road Primary School - Fire alarm	Batley East	£45,000
Westborough High School - Boiler replacement	Dewsbury West	£212,400
Westmoor Primary School - Phase 3 rewire	Dewsbury West	£188,000
Westmoor Primary School - Phase 2 roofing works	Dewsbury West	£145,000
Whitechapel Primary School - Phase 4 roofing works	Cleckheaton	£231,250
Wilberlee J & I School - Phase 2 heat pump installation	Colne Valley	£135,700
Woodley School & College - Bay window roof replacement (Mansion block)	Newsome	£15,000
Woodley School & College - Flat roof replacement	Newsome	£20,000
Woodley School & College - Dry rot works	Newsome	£95,000
	Total	**£3,035,000**

Reserve Schemes		
Birkby I & N School - Roofing works	Greenhead	£205,500

PROPOSED ALLOCATIONS TO 2026/27 LEARNING AND EARLY SUPPORT CAPITAL MAINTENANCE PROGRAMME APPENDIX B

Project	Ward	Expected Total Cost of Project
Bywell CE(C) Junior School - Lighting replacement	Dewsbury East	£60,000
Carlton J & I School - Ph 1 Heating distribution and domestic pipework	Batley East	£141,600
Carlton J & I School - Phase 1 Rewire	Batley East	£214,000
Clough Head J & I School - Roofing works	Colne Valley	£100,000
Emley First School - Fire alarm	Denby Dale	£24,000
Hopton Primary School - Phase 1 Rewire	Mirfield	£130,000
Warwick Road Primary School - Partial heating distribution replacement with LST radiators.	Batley East	£88,500
Warwick Road Primary School - Ph1 re-roof pitched roof areas 20 & 21	Batley East	£98,500
Wellhouse J & I School - Lighting replacement	Colne Valley	£55,000
Wilberlee J & I School - Lighting replacement	Colne Valley	£54,000

Kirklees COUNCIL

Report title: White Rose Forest -Trees for Climate programme [2026-2030]

Meeting	Cabinet
Date	24th March 2026
Cabinet Member	Cllr Turner
Key Decision **Eligible for Call In**	Yes Yes

Purpose of Report

The purpose of this report is to seek Cabinet approval to accept a new funding agreement for the delivery of the Trees for Climate programme, over the 2026 to 2030 period, across West and North Yorkshire to support the delivery of the White Rose Forest (WRF) Strategic Plan.

Recommendations

It is recommended that Cabinet:

1. Note the contents of this report and attached appendices 1-6.
2. Approve / Accept grant funding of approximately £47m of capital and £2.6m of revenue from Cheshire West and Chester Council to implement and deliver a new Trees for Climate programme for 2026-2030.
3. Delegate authority to the Executive Director for Place, in consultation with the Service Director for Finance and Service Director for Legal, Governance and Commissioning and with the Portfolio Holder for Finance Regeneration to:
    - 3.1. Enter into both capital and revenue funding agreements with Cheshire West and Chester Council (the accountable body for the national Defra funded programme).
    - 3.2. Implement and deliver the Trees for Climate programme for West and North Yorkshire (and a wider geography, where appropriate and feasible) including recruitment and procurement of the resources required to deliver the programme objectives including the ongoing monitoring of the outcomes, over multiple years, working in partnership with the Community Forest Trust, and England's Community Forest network.
    - 3.3. receive both capital and revenue funding from the Trees for Climate [2026-2030] programme funders both as the accountable body for the WRF and to make offers of grant funding in order to pass funds on to eligible project applicants.
    - 3.4. Pursue other funding including match-funding opportunities, private sector donations and sponsorships to support the delivery of the WRF strategic objectives and where appropriate enter into funding agreements with funders.
4. Cabinet delegate authority to the Service Director Legal, Governance and Commissioning to enter into on behalf of the Council, any external funding agreements including with Cheshire West and Chester Council as accountable body for DEFRA; any funding agreements to pass down funding with third party landowners and /or other ancillary legal agreements /legal instruments/land management service agreements to implement the above recommendations in accordance with Finance Procedure Rules and Contract Procedure Rules.

Reasons for Recommendations
To enable Kirklees Council to accept a new multi-million pound Department of Environment, Food and Rural Affairs (Defra) grant allowing the WRF to expand its current programme of tree planting activity beyond the end of its initial six year funded [2020-26] programme. This will support the objectives of the new WRF Strategic Plan (2025-2050) approved by Cabinet in July 2025 to increase woodland cover across North and West Yorkshire, and for the WRF to pursue additional funding to help sustain the programme beyond 2030 and become less dependent on one single source of public funding.

Resource Implication:

The full cost of the WRF team will be met through Trees for Climate funding. There is no obligation for Kirklees Council to make a financial contribution to meet the cost of resources.

An existing team will be retained for this new programme. They are employed by Kirklees Council and the Community Forest Trust (CFT) - a national organisation acting on behalf of all England's Community Forests, including the WRF.

Both revenue and capitalised funding will be used to meet staff salary costs. The WRF plan to retain some of the available capital funding to meet the cost of resourcing the monitoring activity up to 2045.

Date signed off by <u>Executive Director</u> & name	David Shepherd – 28th January 2026
Is it also signed off by the Service Director for Finance?	Kevin Mulvaney – 12th March 2026
Is it also signed off by the Service Director for Legal Governance and Commissioning (Monitoring Officer)?	Samantha Lawton – 11th February 2026

Electoral wards affected: All - the White Rose Forest works with key regional partners and covers North and West Yorkshire including the Yorkshire Dales and North Yorkshire Moors National Parks.

Ward councillors consulted: No

Public or private: Public

Has GDPR been considered? Yes. No personal data

1. Executive Summary

Kirklees Council has been the lead organisation and accountable body for the delivery of the White Rose Forest [WRF] since 2002. The White Rose Forest (WRF) is the community forest for North and West Yorkshire. Its core partners are the local authorities, combined authorities and national park authorities of that geography (see Appendix 1 – WRF Map).

For the last six years Kirklees Council through its WRF partnership, has been a significant contributor to the successful delivery of Trees for Climate part of the Department for Environment, Food & Rural Affairs [Defra] funded Nature for Climate programme. Creating 2,200ha of new woodland across West and North Yorkshire to date (200ha within Kirklees) (see Appendices 2 & 3 for locations of WRF projects to date).

The WRF administers its Trees for Climate programme as a grant programme offering funding, expertise and support to partners and landowners to deliver new woodland creation schemes. Although the planting element of this first programme has now reached its final stages, with tree planting funds ending this planting season (April 2026), the WRF team will continue to monitor the establishment of all the newly created woodland for a further 15 years.

In November 2025 further funding for a second Trees for Climate programme [2026-30] was confirmed with an expectation by Defra, that the WRF partnership will continue to be a key delivery partner. Expanding its tree planting programme across West and North Yorkshire up to 2030.

2. Information required to take a decision

2.1. Background

As a local authority-based Community Forest the WRF works in partnership with other West and North Yorkshire local authorities, Combined Authorities, national parks and with the support of other organisations and groups. It is one of fifteen English Community Forests (ECFs) some of which, like WRF, are supported by the Community Forest Trust [CFT]. a ‘not-for-profit’ organisation with the aim of supporting, enabling and championing the work of Community Forests across England.

Defra and the ECF network consider WRF a fundamental delivery partner in its efforts to achieve government tree planting targets. This reputation is based on a successful track record of tree planting across West and North Yorkshire over the last six years. The WRF is expecting to achieve -

- over 2,600 hectares [ha] of new woodland by 2026, approximately 30% of the overall achievements of the national, six year programme.
- 240 hectares of new woodland within Kirklees, 4% of the overall achievements of the national programme.

Over the last six years the Trees for Climate funds have been the main source of tree planting funds for the WRF. This has been supplemented with funds from other Defra programmes such as Grow Back Greener (Northern Forest), Urban Tree Challenge Fund and private sector funding e.g. Northern Gas Network. All have contributed to the delivery of the WRF’s tree planting programmes, supporting tree planting in both rural and urban areas. All existing programmes will end in March 2026 with limited funding available to support the establishment of Trees for Climate projects.

The White Rose Forest Strategic Plan [2025-50] provides the overarching tree and woodland strategy for North and West Yorkshire and is the long-term strategic document governing development of the WRF and its partnership. It sets out the vision, aspirations and targets for trees and woodlands to be delivered through a series of five-year Action Plans.

The Strategic Plan aims to achieve the following -

- Increase tree and woodland cover in West & North Yorks by 16.5%

- ensure 70% of woodland is sustainably managed
- 5% of households live close to accessible woodland
- engage 16,000 people in the work of the White Rose Forest each year
- secure up to 50% of its future funding from non-public sector sources

The Plan is based on a strong collaborative commitment by its partner organisations including Defra, local and combined authorities, national park authorities, national landscape organisations, charities, businesses and community enterprises.

This next phase of the Trees for Climate programme will offer significant financial support to the delivery of the objectives listed above. The funding will either be offered to landowners with eligible projects or used for direct delivery by the WRF team ensuring the continuation of a highly successful programme of landowner supported new woodland creation and urban tree planting across the WRF geography.

To deliver greater benefits for communities across North and West Yorkshire WRF will target woodland creation as part of two key WRF programmes

1. Landscapes for Water – provides a strategic approach to natural flood management to reduce flood risk for communities and businesses downstream (see Appendix 4 – WRF Priority Area -Landscape for Water)
2. Green Streets® - focusses on urban planting and aims to improve air quality, make our urban spaces more attractive for businesses and encourage the uptake of active travel, linking areas of deprivation to education/employment sites (see Appendix 5)

2.2. <u>Cost breakdown</u>

Confirmation of a new national Nature for Climate programme (worth up to £400 million per year) was announced in the November 2025 government budget. The programme has an overall target to create 8,600 hectares [ha's] of tree planting across England by March 2030. Defra expect the ECF network, the National Trust and Woodland Trust to deliver this programme of tree planting.

Each of the 15 Community Forests including the WRF will be allocated funding based on an allocation of hectares of new woodland to be delivered, these are yet to be finalised, but estimations are provided below.

<u>Capital funding</u>

The WRF allocation across the 4-years of the programme is expected to be c£47million based on a target of 1,683ha of new woodland creation (approx. 21% of the total ECF programme). Allocation is likely to be higher in year 1 and reduce slightly across each year of the programme.

<u>Revenue funding</u>

The WRF allocation across the 4-years of the programme is expected to be c£2.6million based on a target of 1,683ha of new woodland creation.

The methodology for calculating revenue funding for the entire lifespan of the programme has been agreed by the ECF network and will be based on an offer of a baseline of approx. £50,000 per annum plus an additional £1,295 for every hectare allocated to WRF.

It is estimated, based on the above hectare allocation, the WRF team will cost approx. £5.3m over the 4 years of the programme. Therefore, the total revenue funding of £2.6m will not cover the full costs.

However, the remaining staff cost will be recovered from;

1. the capital funding on eligible work areas (in agreement with Kirklees finance and audit procedures and those of the accountable body for the ECF programme (CWAC).
2. Unspent revenue grant funding from previous years [2020-26].
3. Income from other funding sources.

2.3 Timescale

The new Nature for Climate fund is set to run from 2026 to 2045, with the first four years (2026/2027 to 2029/2030) assigned to tree planting and the remainder to the further support and monitoring required to ensure the successful establishment of the new woodland.

This new programme will be delivered alongside the monitoring activity required of the earlier 2020 – 2026 Trees for Climate programme.

2.4 Expected Outcomes

As mentioned above, the WRF's new targets have not yet been finalised but are expected to be 1683ha of new woodland. WRF expects the first year's tree planting target to be 452ha which given the current healthy pipeline of 1,400 ha of projects in development, suggests a high confidence of delivery.

2.5 Expected Impact /outcomes

- Increase tree canopy across West and North Yorkshire
- Increases accessibility of woodland and green space to residents of West and North Yorkshire
- Growth in expertise, knowledge, skills and participation in tree planting by partner organisations, communities and landowners.

Benefits

- Offers a further four years of financial stability in delivering WRF objectives
- Helps retain expertise of current WRF staff team
- Offers the necessary funding solutions needed to unlock a significant pipeline of 'ready to deliver' landowner planting schemes
- Supports the delivery of WRF partner organisations targets e.g. Kirklees Council's 21% woodland canopy target by 2050.
- Provides partnership and community capacity to engage more people in tree planting across WRF geography
- Further raises the national profile of the WRF and community-based tree planting projects
- Offers new skills and career opportunities to the sector

Key Risks – *[mitigation of these risks are addressed at 3.5]*

- Not securing the expected allocation of Trees for Climate funds
- Not achieving the required allocation of hectares of tree planting (impact on funding especially through capitalising of staff costs)
- Unable to retain expertise in the team and in WRF partner organisations
- Key delivery partners fail to deliver against their targets.

2.6 Evaluation

The ECF network has a single database, used by all the Community Forests, that enables Trees for Climate reporting requirements to be managed locally and nationally.

WRF provides weekly reports to CWAC and Defra to monitor progress of programme delivery with a formal annual evaluation of performance across the ECF network at the end of each planting season to confirm funding and support grant claims.

There is a national ECF Trees for Climate conference including key partners and is used as a platform for evaluating past achievements and identifying future improvements. In addition, individual landowner projects are used as widely available case studies to highlight specific successes, issues etc.

All of the above activity will continue to operate during the delivery of the new programme.

2.7 Sustainability

The expansion of the governments funded tree planting programme offers stability to the WRF partnership and its core team activity. The Defra agreement will commit funds for; tree planting up to 2030 and establishment of new woodlands up to 2045. Kirklees Council will continue to receive yearly funding agreements from the programme's accountable body with agreed targets to achieve.

The new WRF Strategic Plan (2025-2030) also outlines its intentions to become less reliant on Defra funding and makes a commitment to sourcing alternative funding to secure its sustainability, one of its objectives is 'to secure up to 50% of funding from non-public sector sources by 2050'. This work is underway with the appointment of a WRF Development Manager whose role will be to progress this priority over the next 4 years.

2.8 Services & agencies involved

a) Some internal Kirklees services already support the delivery of the WRF programme e.g. legal, financial, audit etc. Good service arrangements already exist with these departments which will aid a seamless transition into the delivery of the new programme.

b) The Community Forest Trust [CFT], is a limited company with charitable status, set up to support the work of all England's Community Forests, including the White Rose Forest. It is named as a strategic partner in the Defra Trees for Climate grant agreement and acts as accountable body for some other regional and national tree planting funding streams e.g. National Gas Network and One Tree Planted, passing funds on to Kirklees/WRF in exchange for the delivery of specific schemes. It currently employs some of England's Community Forest staff including 10 FTEs for the WRF team and provides a recruitment service when WRF have been unable to recruit new staff to Kirklees Council. The grading and pay scales of the WRF staff employed through CFT are aligned to those of Kirklees Council. CFT provides a unique service to the sector including a direct conduit to key government departments like Defra. It charges the WRF an average fee of £43,000 per annum [c4.5% of WRF current revenue budget] for its employment services. This is considered well within market averages for similar services, however before the next programme begins the service arrangement including its fee structure will be fully reviewed to ensure it remains justifiable and legitimate.

3. Implications for the Council

This report is recommending that Kirklees Council commits to a further four years of WRF tree planting across West and North Yorkshire. It will also need to continue to

provide the resources for monitoring newly created woodland for a further 15 years extending the original programme activity to 2045.

This activity will be treated as a continuation of the delivery of the first programme which Kirklees Council agreed to deliver back in 2020. It already has a team in place to deliver this and the new programme activity. It has budgeted for the ongoing monitoring required of the original programme. The legal, financial and resource implications and risks are outlined in the sections below.

3.1 Council Plan

Delivering a second Trees for Climate programme will contribute to the [2026-2029] Council Plan;

- Shared Outcome; **'Clean and Green'** and
- Priority: 'Enabling everyone to thrive and have successful lives' by providing a more sustainable environment with a focus on low carbon energy sources, warm homes **as well as care for our natural environment'**

WRF tree planting schemes will also contribute to the key indicator - **'**People in Kirklees experience a high quality, clean and green environment, described on 'Our People' Strategy.

Additionally, the planned tree planting will support the delivery of Kirklees' Environment Strategy theme 'Nurturing nature' by contributing to the following headline targets.

- Target no. 3. Nature in recovery by 2030
- Target no. 5. Increase Kirklees tree canopy cover to 21% by 2050
- Target no. 6. All people who live, work and study in Kirklees to have access to high quality green / blue space within 5-10 minutes /500m walk by 2038.

Landowners, businesses and local communities' participation and support in local tree planting will continue to be at the heart of all the WRF programmes. One key priority of the WRF Strategic Plan is to 'Engage more people, communities and businesses in the planning, design, planting, management and use of trees and woodland.'

An important element of the new WRF Trees for Climate programme will be further urban tree planting through the Green Streets programme. The focus will be on integrating tree planting into the planning of urban areas and transport corridors to create greener and healthier environments in towns and cities. These funded schemes will continue to be delivered by Kirklees Council and local authority partners across West and North Yorkshire.

3.2 Financial Implications

Match funding

As with the initial Trees for Climate programme this next phase of woodland creation and tree planting will be fully funded by Defra - the funders. No match funding from Kirklees Council is required to fulfil any contract obligations.

Financial management of landowner grants

The WRF will continue to deliver the programme primarily as a landowner grant programme with the possibility of some direct delivery of schemes e.g. WRF procure contractors to plant trees on behalf of a landowner.

They will pass funds onto landowners via a Trees for Climate grant agreement following applications being successfully assessed and approved, a process that evaluates the benefits and cost of each proposed scheme (and where relevant formal approval via forestry regulations).

The grant awards will be issued each planting season between 2026 and 2030, based on the availability of programme funds each year. Whilst WRF agreements aim to cover 100% of the project costs there will be a limit to the amount of grant a landowner can be awarded to ensure that funding is available to cover relevant WRF staff costs.

Due to the longevity of the programme [15 years] an element of each capital award will be held back but ringfenced for the scheme. This will allow the team to release funds in phases over the lifetime of the programme, with the initial grant payment to the landowner paid after completion of the tree planting. Further payments will be released at the discretion of the WRF team to support the ongoing establishment of the woodland. This offers the team some flexibility to manage the capital budget over many years rather than commit all the funds to landowners at the beginning of their project.

Resource costs will be met through a mix of revenue and capital funding, at no cost to Kirklees Council (see 2.2 above).

Redundancy costs will also be factored into the programme's budget to ensure the cost of any possible redundancies can be covered from WRF resources, so no financial risk to Kirklees Council.

Future sustainability
(See 2.7 above)

.

3.3 Legal Implications

This report recommends Kirklees Council continues its role of accountable body for the WRF delivery of this next phase of Trees for Climate programme. This will come with legal obligations set out in the Funding Agreement with CWAC.

This request mirrors the recommendation made in 2020 for the original programme. Kirklees has performed this role for the last six years and is obliged to continue monitoring the current Trees for Climate programme for a further 15 years. The programme is governed through a grant agreement with CWAC (accountable body for the national programme). CWAC has a separate agreement with Defra.

We expect a new but very similar agreement to be issued by CWAC once the full programme targets and funding are agreed upon and allocated across the Community Forests. We envisage an agreement being issued to Kirklees between April and June 2026.

The terms and conditions described in these agreements must be adhered to by all parties/stakeholders therefore landowner grant agreements, drafted by Kirklees legal team, are designed to pass these on to grant recipients/landowners. This reduces the financial risks for Kirklees as any breach of T&Cs can result in funds being clawed back. The WRF plan to continue with this approach and will continue to engage Kirklees legal team in reviewing the new funding agreement once drafted by CWAC.

The WRF will not issue any new programme landowner grant agreements until Kirklees has accepted its own funding agreement with CWAC. Therefore, no financial commitments will be made until Kirklees has secured its new funded programme.

Section 1 of the Localism Act 2011 gives the council the power to do anything an individual generally may do and would permit the Council to enter into the aforementioned funding agreements provided it is reasonable in public law terms to do so.

The Council must comply with its Financial Procedure Rules and Contract Procedure Rules, and the Procurement Act 2023 when procuring supplies such as trees and works or services above specified thresholds.

The Council must comply with the Subsidy Control Act 2022 and statutory guidance when accepting and providing subsidy which includes grants.

3.4 Climate Change and Air Quality

Contribute to KC and other WYCA

Trees and woodlands contribute to providing the following climate change mitigations

- Sequestration in CO_2 – approx. 24KtCO_2 sequestered between 2021 and 2025 worth £6.8m to North and West Yorkshire
- Reduction in pollution – trees help reduce pollution especially in our towns and cities
- Reduction in flood risk – over 1,400ha of new woodland in high-risk areas providing £0.3m of flood reduction to date.
- Biodiversity – woodland planted expanded the ecological networks by over 3,000ha

A new Trees for Climate programme will continue to increase the delivery of the above benefits.

3.5 Risk, Integrated Impact Assessment (IIA), Human Resources

Risk

The risk exposure to the Council in delivering this proposed programme of tree planting remains the same as those of the first programme [2020-2026]. These risks have been monitored regularly through a WRF Risk Register. This is used to report risks to the WRF Strategic Board, ensuring risks are identified and mitigated at a senior governance level.

New risks for Kirklees will be-

- how effectively it manages two programmes running in tandem for the next 15 – 18 years. Some of this can be mitigated against by retaining the current team of experts in the WRF team. Staff costs for the whole lifetime of the two programmes have been budgeted for so the Council is well prepared for the financial costs of this long-term programme.

- underachieving our targets could result in; less revenue and capital funding being available for staff costs and in funds being clawed back if paid in advance of outcomes being delivered. Unless alternative funding options can be secured this will require reductions in the team.

- losing expertise from the current team could have an impact on the WRF's reputation. Fixed term employment contracts end shortly (Sept 26). We expect to be able to extend these contracts as soon as a new funding agreement is received which will offer the staff confidence in their future employment.

- key delivery partners contributing to WRF target fail to deliver their own programme impacting on their own sustainability and contributions to the wider WRF programme. Close monitoring of their performance will be required throughout the delivery period.

Integrated Impact Assessment (IIA)
None of the impacts of the WRF tree planting programme will directly impact on any PSED *'protected characteristic groups'.*

WRF tree planting activity will have a positive impact on the environment and communities in Kirklees and other areas of West and North Yorkshire, including urban areas and areas of deprivation. In particular, the WRF's Green Streets® programme will help to reduce pollution, provide shade and increase biodiversity. Providing communities with increased access to an environment that supports good health and wellbeing.

Human Resources
The WRF team comprises 17 full time equivalent [FTEs] staff, 7 employed by Kirklees Council and 10 with the Community Forest Trust.

Most staff have fixed term employment contracts which end in September 2026, the remaining staff, recruited in the first few years of the original programme have permanent Kirklees employment contracts.

Once the new Trees for Climate funding agreement is accepted by Kirklees the FTE contracts will be extended. Retaining the current team will help with a smooth transition into the new programme.

Continuing to employ some staff through CFT reduces some of the employment risks for Kirklees.

The cost of the ongoing staff team has been addressed in the Financial Implication section of this report which outlines the intention to use some capital funding for salaries as well as revenue.

Recruitment of staff vacancies will continue as before, either through the Kirklees recruitment process or CFT.

4. Consultation

A structured consultation process of key stakeholders was adopted during the development of the WRF Strategic Plan [2025-2050]. This consultation included Local Authorities [LAs] across West & North Yorks, Combined Authorities, National Park Authorities & Landscape Authorities, Defra and associated bodies, local and national charities. All the Strategic Board representatives have approved the WRF Plan, thereby confirming their commitment to the WRF partnership.

Their ongoing participation, engagement and collective action is key to the success of the WRF partnership and will be crucial to the delivery of the actions within the WRF Strategic Plan and the next Trees for Climate programme over the coming years.

Wider consultation of the proposed next phase of Trees for Climate programme has also taken place over the last year with Defra [the funders] and the wider ECF network to agree upon the programme's outputs and financing.

As part of the delivery of individual projects formal consultation is also a required. Any planting scheme over two hectares is subject to the Environmental Impact Assessment [EIA] regulations and all projects are subject to due diligence that includes consultation takes place with key stakeholders e.g. Forestry Commission, Environment Agency, National Parks, Natural England, Historic England, archaeological and ecological record centres and the public.

5. Engagement

For the WRF partnership to work effectively regular engagement with communities, businesses and landowners is essential.

Adopting a wide partnership approach based on good long-term relationships has enabled the WRF to build a network of stakeholders with connections to tree planting and woodland creation. These include Local Authorities [LAs], across West & North Yorks, Combined Authorities, National Park Authorities & Landscape Authorities, Central Government departments, Environmental and NGOs.

Regular engagement takes place through the WRF governance channels including

- WRF Strategic Board made up of LAs, Combined Authorities and National Park Authorities.
- WRF Programme Management Group involving different representatives of the wider woodland sector
- WRF's District Groups which offers direct engagement within each LA area.
- WRF Community Forum a platform for regular engagement with the wider tree planting community, including smaller not-for-profit organisations and community groups.

The WRF also has representation at

- the national Trees for Climate Board
- England's Community Forest national network,

Both of which facilitates direct engagement with other community forests and Defra.

Ongoing engagement with private landowners, local communities and regulatory organisations [e.g. Forestry Commission, Natural England etc.] is embedded in WRF processes, as these play a key part in the planning and design of tree planting schemes. No engagement with Council Leaders or political groups will take place until Kirklees Council has formally received its Trees for Climate [2026-2030] grant agreement.

6 Options

6.1 Options Considered

a) Decide not to accept the new funding offer

This option is **not recommended** as it would almost certainly terminate any future WRF supported tree planting as the Trees for Climate funding is the main source of funding for the WRF. The loss of capital and revenue would result in fewer trees being planted, outcomes of the Council Plan and Environment Strategy not being delivered and reputational damage to Kirklees and WRF. The only way to continue to employ the team

and support tree planting schemes would be to source other external funding but this would take a considerable length of time. It would be difficult to retain the staff team and landowner interest in WRF tree planting would dissipate.

b) Decide to scale down the new programme and accept a smaller funding grant
This option is **not recommended** as it would substantially reduce the team's ability to make an impact across West and North Yorkshire, inhibiting the development of a currently healthy pipeline of pending tree planting projects. A priority selection process would have to be introduced which would only allow some projects to proceed. The capacity and status of the WRF as a leading community forest would also be diminished. This option would almost certainly terminate any future WRF supported tree planting as the Trees for Climate funding is the WRF main source of programme funding. The only way to continue to employ the team and support tree planting schemes would be to source other external funding but this would take a considerable length of time. It would be difficult to retain the staff team and landowner interest in WRF tree planting would dissipate.

c) **Decide to accept the full grant offer [the preferred option]**
Accepting the full grant offer will allow the WRF to sustain its current position as a - leading organisation for tree planting not only across West and North Yorkshire but across England. The funds will offer employment stability to the current team, helping retain tree planting expertise and skills in the region. It also offers time to source alternative funding which will be needed beyond 2030.

7. Next steps and timelines

1) Respond with the assistance of Kirklees legal team, to the expected grant agreement from Cheshire West and Chester Council to secure the Trees for Climate [2026-30] capital and revenue funding. The agreement is expected between April and June 2026.

2) Arrange to extend Fixed Term employment contracts once the funding has been secured and recruit to any vacant posts. June 2026.

3) New Trees for Climate programme commences; tree planting applications are taken through the regulatory stage, assessed and awarded grant funding if successful. May/June 2026 onwards.

4) Continue to progress the current WRF pipeline of landowner planting schemes in anticipation of the start of the next programme. April – June 2026.

5) Finalise the delivery of the first Trees for Climate tree planting schemes. March – April 2026 and move activity from the first programme from planting into monitoring stage. April 2026 onwards.

8. Contact officer

Iwan Downey, White Rose Forest Programme Director.

9. Background Papers and History of Decisions

Kirklees Council Cabinet reports – 8 Jul 2025 [WRF Strategic Plan], 14 Dec 2021 [Northern Forest & Urban Tree Challenge], 13 Jul 2020 [Tree for Climate].

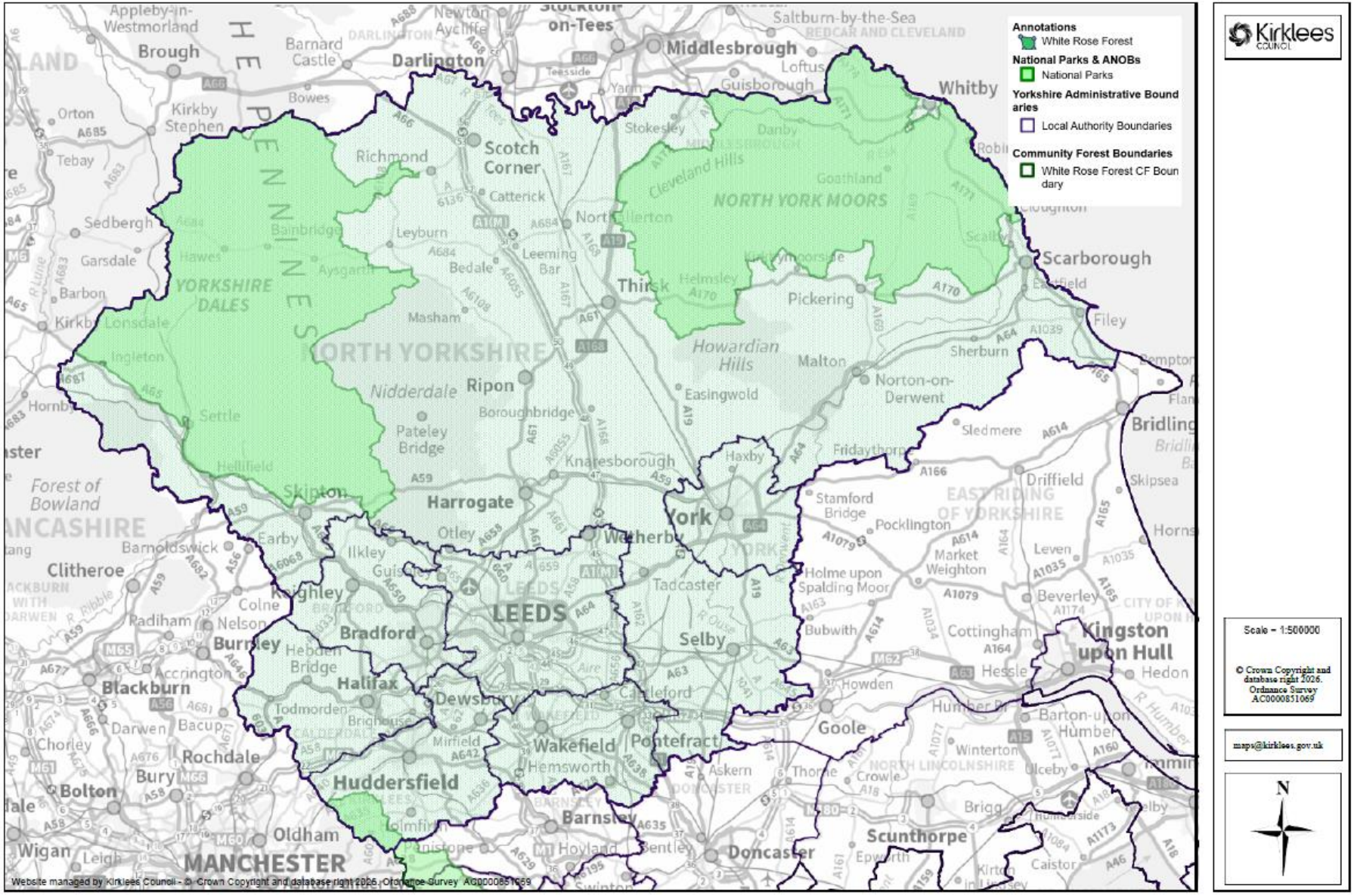
10. Appendices

1. White Rose Forest Map
2. Location of WRF Projects To Date
3. Location of WRF Projects in Kirklees To Date
4. WRF Priority Areas – Landscapes for Water
5. WRF Priority Areas – Green Streets®
6. Letter of indicative allocation from Cheshire West & Chester Council

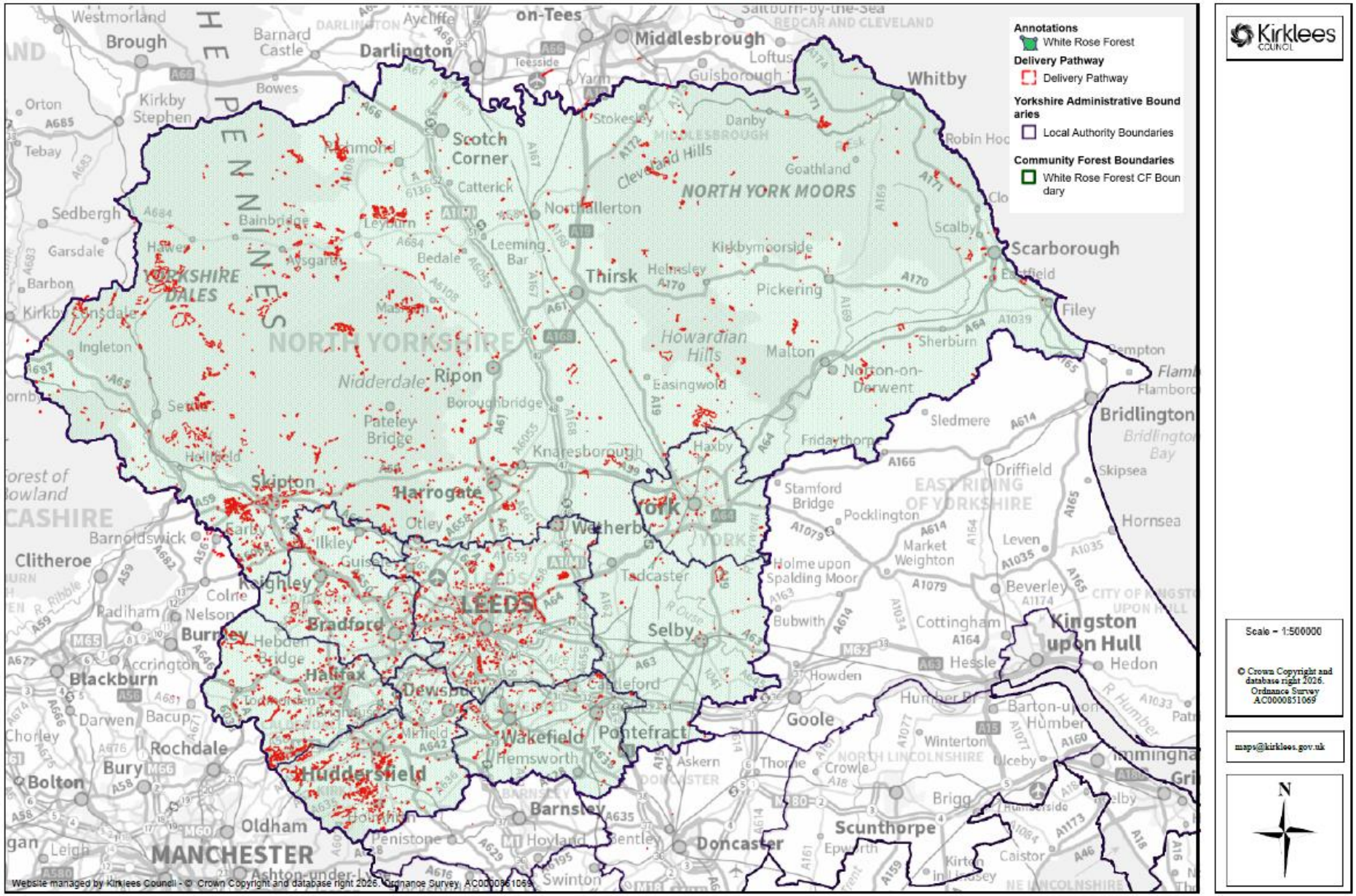
11 Service Director responsible

David Wildman – Service Director for Regeneration & Skills

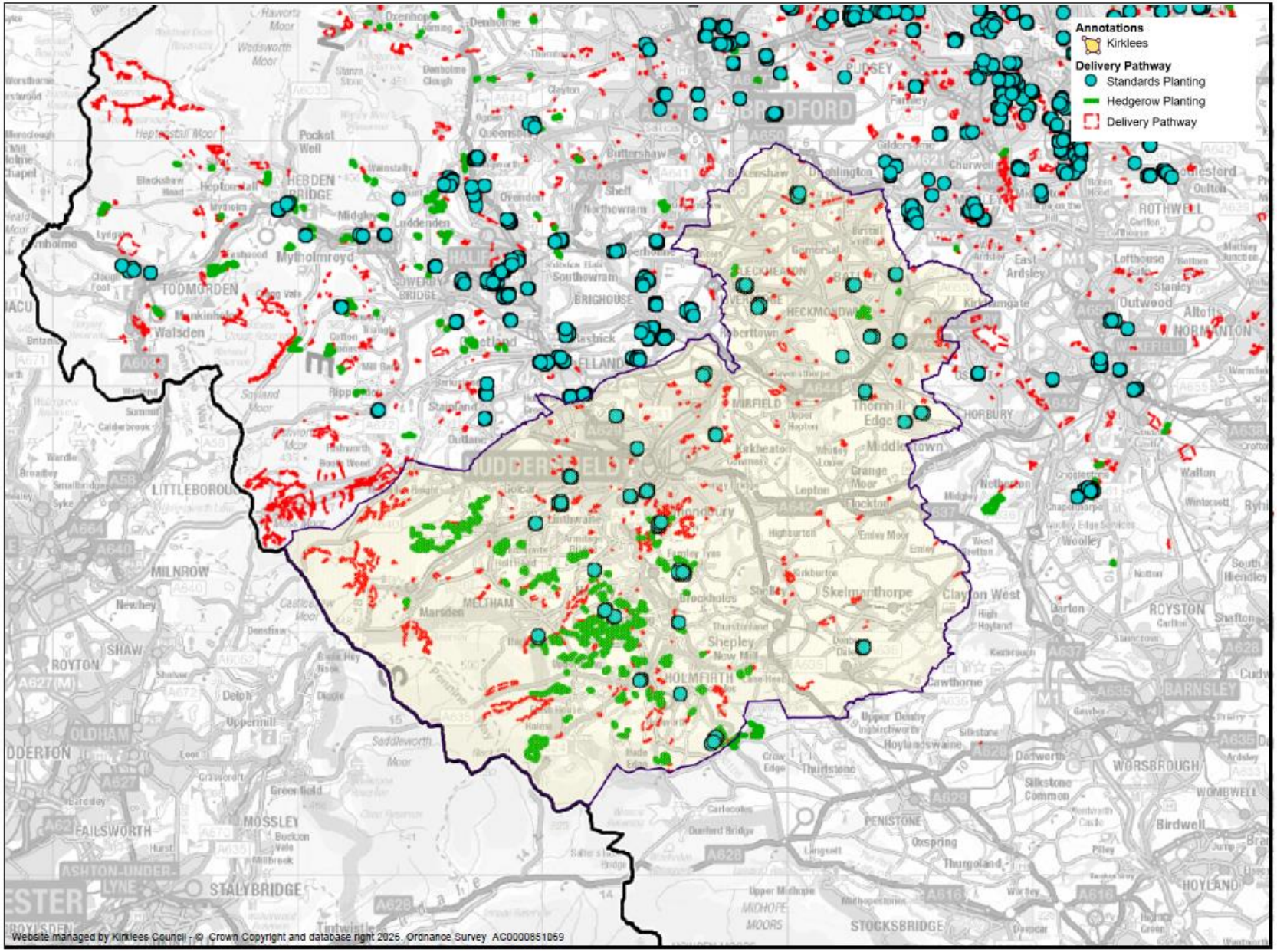
Appendix 1 - White Rose Forest Map



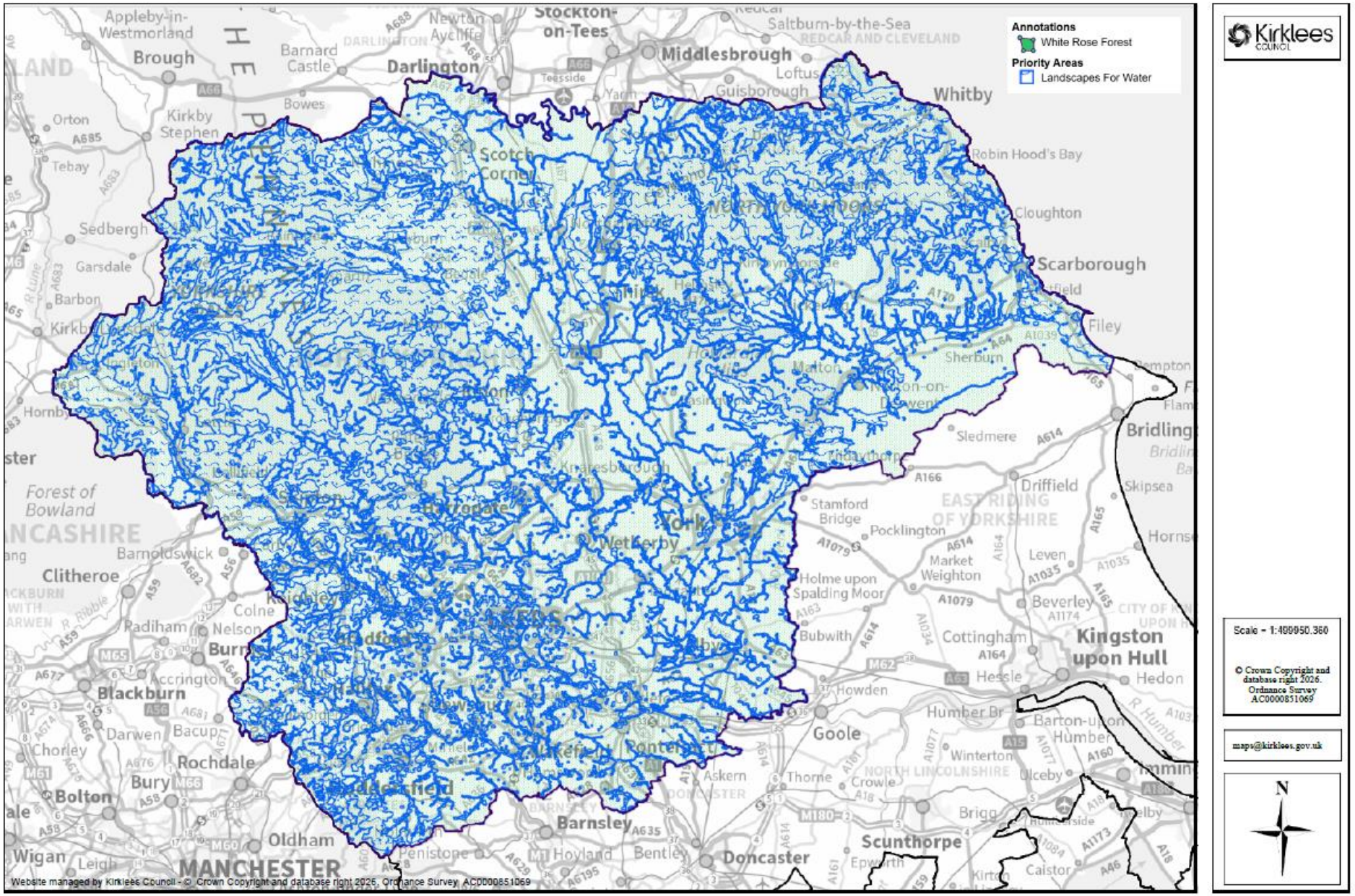
Appendix 2 - Location of WRF Projects To Date



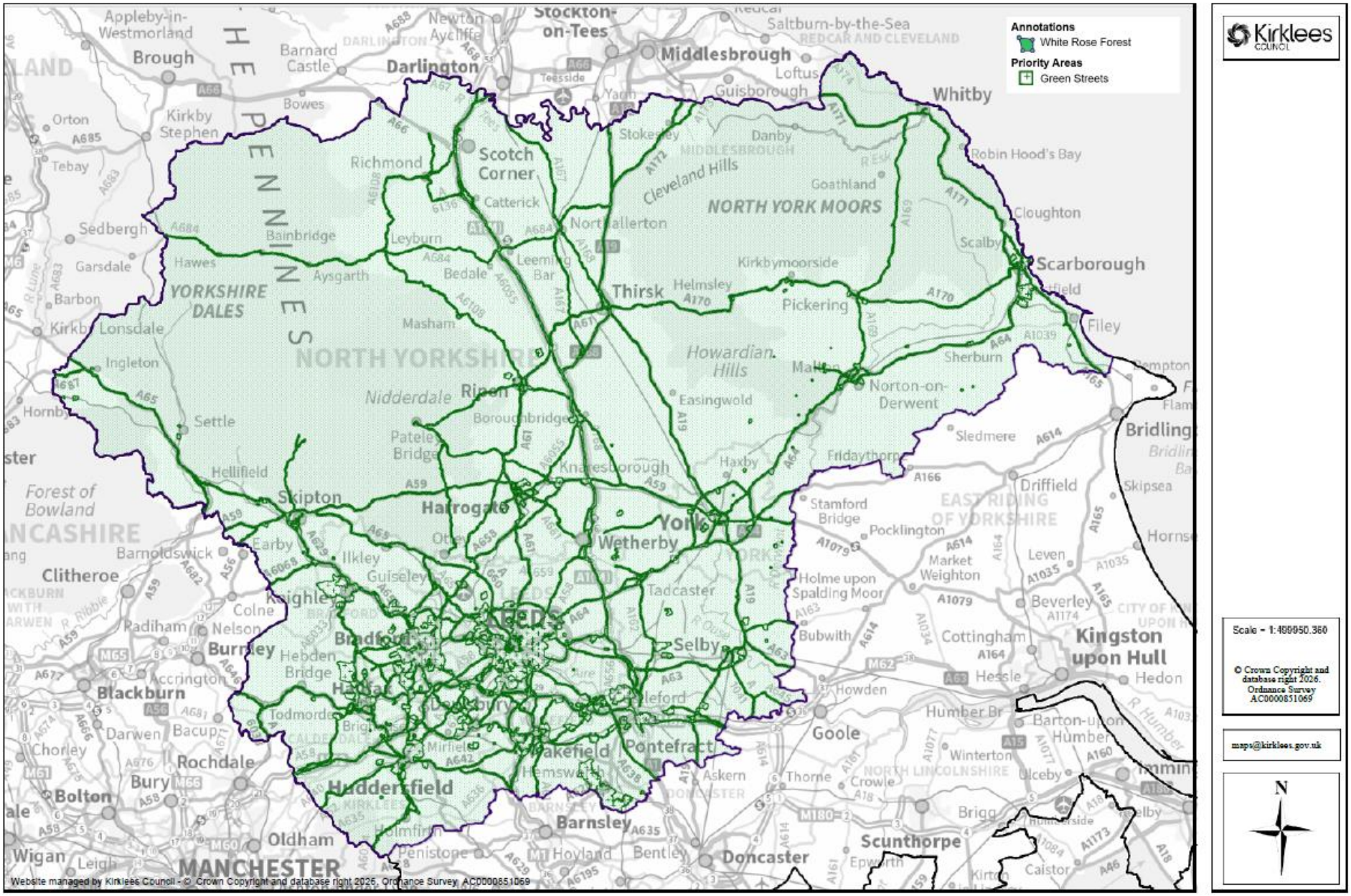
Appendix 3 - Location of WRF projects in Kirklees To Date



Appendix 4 - WRF Priority Area - Landscapes for Water



Appendix 5 - WRF Priority Area - Green Streets



To TFC2 delivery partner

Trees for Climate successor programme has been developed by the Community Forests with the support of the Community Forest Trust, National Trust, Woodland Trust and the Accountable Body, Cheshire West and Chester Council (CWACC), over the past 2 ½ years.

The final settlement for the Programme is not yet known, so no definitive figures or funding commitments can be given by the Accountable Body.

The likely timeline for decisions leading to the issuance of Grant Funding Agreements is shown below.

Milestone Description	Date
S31 Received from Defra.	**31/03/2026**
GFAs issued to Partners, signed and returned to PMO	**30/04/2026**
MOU for the successor Programme approved	**30/04/2026**
Receive payment from Defra – RDEL and CDEL (first instalment)	**31/05/2026**
POs issued to Partners – RDEL and CDEL (first instalment)	**31/05/2026**
Invoices received from Partners processed.	**31/05/2026**

During the course of developing the successor programme, the Council has requested feedback from respective delivery partners on possible delivery targets. Based on the information you have submitted, and the allocation process undertaken recently the current allocation for White Rose Forest is:

£14,134,312 – CDEL for 402 Non-NT Hectares, 50 NT Hectares and 44 WT Hectares

£635,113 - RDEL

The figures above relate to financial year 2026/27 only. The final figures for all strands of funding will be communicated to White Rose Forest as soon as possible once Defra have made their decisions. In the meantime, we, the PMO, will keep all partners informed of any information that may significantly alter the estimated allocations shown above.

For the avoidance of doubt, CWACC, as the accountable body, is not able to make any commitment to any level of funding until it has all the funds provided for in a contract with Defra and the Council is in receipt of funds into its account.

Yours Sincerely,

Paul Nolan
Programme Director

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Report title: Kirklees Local Plan Update: Commencement and Delivery Arrangements

Meeting	**Cabinet**
Date	**24th March 2026**
Cabinet Member (if applicable)	**Cllr Graham Turner (Finance and Regeneration)**
Key Decision **Eligible for Call In**	**Yes, 23rd February 2026** **Yes**

Purpose of Report

To set out the implications of the Town and Country Planning (Local Planning) (England) Regulations 2026 laid before Parliament on 4 March 2026 and which will come into force on 25th March 2026 (Statutory Instrument 2026 No. 186). The 2026 Regulations will bring into effect a new plan-making system and set out the regulatory procedures to produce Local Plans, Minerals and Waste Plans and Supplementary Plans (the replacement for Supplementary Planning Documents).

Kirklees Council will be required to progress the Local Plan update in compliance the 2026 regulations which include new statutory requirements to commence a plan process. The purpose of this report is to set out these requirements and the process for Cabinet to agree to commence a plan and undertake required statutory tasks in accordance with the 2026 regulations.

Recommendations

1. That Cabinet approves that a full update of the Kirklees Local Plan commences in accordance with the Town and Country Planning (Local Planning) (England) Regulations 2026.
2. Cabinet approves the submission of a notice of intention to commence the Kirklees Local Plan update to the Ministry of Housing, Communities and Local Government (MHCLG) and its publication (as set out at paragraph 2.11 of this report) (Regulation 19).
3. Cabinet approves an updated Local Plan Timetable as set out at Table 1 of the report and authorises its submission to MHCLG and its publication (Regulation 4 and 5).
4. Cabinet delegates authority to the Executive Director of Place in consultation with the Finance and Regeneration Portfolio Holder to update and publish the Local Plan Timetable monthly or as required to ensure an up-to-date timetable is publicly available (Regulation 6).
5. Cabinet delegates authority to the Executive Director of Place in consultation with the Finance and Regeneration Portfolio Holder to agree commencement of the scoping consultation (Regulation 20).
6. Cabinet delegates authority to the Executive Director of Place in consultation with the Finance and Regeneration Portfolio Holder to approve, submit and publish documents for Gateway 1 self-assessment (Regulation 21), Gateway 2 (Regulation 26) and Gateway 3 (Regulation 31).
7. Cabinet delegates authority to the Executive Director of Place in consultation with the Finance and Regeneration Portfolio Holder to agree the content of and commencement of Consultation: Proposed Local Plan content and evidence, including draft vision (Regulation 23) and Consultation on the proposed local plan (Regulation 27) with feedback brought back to a future Cabinet meeting.

Reasons for Recommendations • To comply with new plan-making regulations to commence the Local Plan. • To agree decision-making processes to support the council's ability to meet the government prescribed plan-making period of 30-months.
Resource Implication: An existing budget for the Local Plan preparation has been agreed. There are no additional Local Plan costs associated with commencing plan-making under the new system. An expression of interest (EOI) has been submitted for new plan making funding (approximately £120K to be decided). Eligibility for funding is dependent on committing to achieving the following milestones: • Publication of a notice of intention to commence local plan preparation by 30 June 2026. • Publication of Gateway 1 self-assessment by 31 October 2026. The dates for funding eligibility are factored into a new Local Plan Timetable. If the council is successful in its expression of interest for new plan-making funding this has the potential to be used to reduce the financial commitment associated with plan preparation but also provides capacity to support additional evidence gathering which may arise from revised national planning policy published December 2025, further reforms or digital enhancements to support plan making. The Local Plan will continue to be progressed by current team resources with cross-service support on the development of plan content.

Date signed off by <u>Executive Director</u> & name	David Shepherd - Executive Director for Place - 11th March 2026
Is it also signed off by the Service Director for Finance?	Yes - Kevin Mulvaney - 12th March 2026
Is it also signed off by the Service Director for Legal Governance and Commissioning (Monitoring Officer)?	Yes - Samantha Lawton - 12th March 2026

Electoral wards affected: All

Ward councillors consulted: Finance and Regeneration Portfolio Holder 24th February 2026.

Public or private: Public

Has GDPR been considered? Yes, no personal data is recorded in this report.

1. Executive Summary

1.1 New requirements for statutory plan-making have been formalised in regulations laid before Parliament on 4 March 2026 and which will come into force on 25th March: Town and Country Planning (Local Planning) (England) Regulations 2026 (Statutory Instrument 2026 No. 186).

1.2 Kirklees Council will be required to progress the Local Plan update in compliance the 2026 regulations which include new statutory requirements to commence a plan process. The purpose of this report is to set out these requirements and the process for Cabinet to agree to commence a plan and undertake required statutory tasks in accordance with the 2026 Regulations.

1.3 Cabinet previously considered the commencement of a full update of the Kirklees Local Plan on 17th October 2023. Decisions at this point were made in the context of progressing a Local Plan under The Town and Country Planning (Local Planning) (England) Regulations 2012. These regulations have now been superseded by The Town and Country Planning (Local Planning) (England) Regulations 2026 which has introduced new requirements to start a plan-making system.

1.4 MHCLG guidance/regulations state that Local Planning Authorities are required at the start of the process, to submit and publish a notice of intention to commence (Regulation 19), submit and publish a Local Plan Timetable (Regulation 4 and 5) (that will replace the council's adopted Local Development Scheme July 2025) and undertake scoping consultation (Regulation 20). These tasks must be completed prior to the submission of a Gateway 1 self-assessment to the Planning Inspectorate (new requirement). Subject to successful outcome of the Gateway 1, the council can then proceed to the prescribed 30-month plan-making process.

1.5 This report sets out the procedural requirements and proposed delegation for consideration by Cabinet to ensure the progression of the Local Plan preparation in accordance with statutory requirements and to agree decision-making processes to support the council's ability to meet the government prescribed plan-making period of 30-months. It does not cover proposed content which will be the subject of future reports.

1.6 Issues for consideration by Cabinet include:

- Approval of a notice of intention to commence and its publication.
- A revised Local Plan Timetable to reflect the new plan-making requirements and regulations.
- Delegation to support an efficient and effective method of decision-making to progress the plan to meet the 30-month government prescribed plan-making period.

2. Information required to take a decision

Background

2.1 Cabinet previously considered the commencement of a full update of the Kirklees Local Plan on 17th October 2023. Decisions at this point were made in the context of progressing a Local Plan under The Town and Country Planning (Local Planning) (England) Regulations 2012. These regulations have now been superseded by The Town and Country Planning (Local Planning) (England) Regulations 2026 which has introduced new requirements to start a plan-making system.

2.2 This report requests Cabinet to approve that a full update of the Kirklees Local Plan commences in line with the 2026 regulations. This will provide a robust and transparent decision-making process clearly indicating the move to a new statutory plan-making process.

2.3 The Government's plan-making reforms over the last 12 months represent a significant restructuring of local plan preparation with a focus on up-to-date plans, and a more efficient, transparent planning system that supports a growth agenda. This report focuses on the technical/procedural requirements to commence under the new system. Details of proposed content will be the subject of further Cabinet reports.

2.4 In November 2025, the government published a suite of new plan-making guidance in advance of the publication of new plan making regulations to enable local planning authorities to progress local plans under the new system. Transitional arrangements

were also published for local plans that could be submitted for examination under the current system by 31 December 2026. Kirklees had already acknowledged to the Ministry of Housing, Communities and Local Government (MHCLG) that it could not meet this deadline due in part to rescoping of evidence in the light of changes to national planning policy, ongoing dialogue with statutory consultees to agree the scope of evidence, internal and external consultee capacity and emerging new planning legislation. A revised timetable reflecting this, was outlined in the council's current Local Development Scheme 8th July 2025. As the council could not meet the timescales for the transitional plans it has no option but to proceed on the new plan-making process.

2.5 When the 2026 Regulations are brought into force on 25th March 2026, there are new statutory requirements which the council must adhere to, to ensure a plan process is compliant with legislation. This includes new requirements to start the Local Plan process, a new timeframe: 30 months plan preparation, this commences following a successful gateway 1 self- assessment and a revised process involving scoping consultation, two public plan consultations and three gateway assessments (two inspection led) to ensure that issues are addressed early in the process. The new plan-making guidance: Rollout of the new local plan-making system - GOV.UK states that all local plans under the new system must give notice of intention to commence by December 31st 2026 and publish Gateway 1 self-assessment by 30th April 2027.

2.6 The plan-making guidance is clear that Local Planning Authorities must follow the legal requirements of the system it is preparing a plan under from start to finish (Rollout of the new local plan-making system - GOV.UK). There is no ability to mix requirements of the 2012 regulations with those of the 2026 regulations and under the new system, local planning authorities must start by giving notice of intention to commence.

2.7 This does not mean that all the work carried out to date on the Local Plan is abortive. The extensive evidence gathering to inform the new plan can be carried forward subject to a review of compliance with the consultation draft of revised National Planning Policy Framework published for consultation in December 2025. We will continue to work with internal and external partners on site assessments gathered through our call for sites process. Additionally, we can build on the early engagement work already undertaken. However, the new statutory requirements for scoping consultation (Regulation 20) will require further engagement exercises and can only be undertaken once a notice of intention to commence and a Local Plan Timetable have been submitted to MHCLG and published.

New Plan-making system

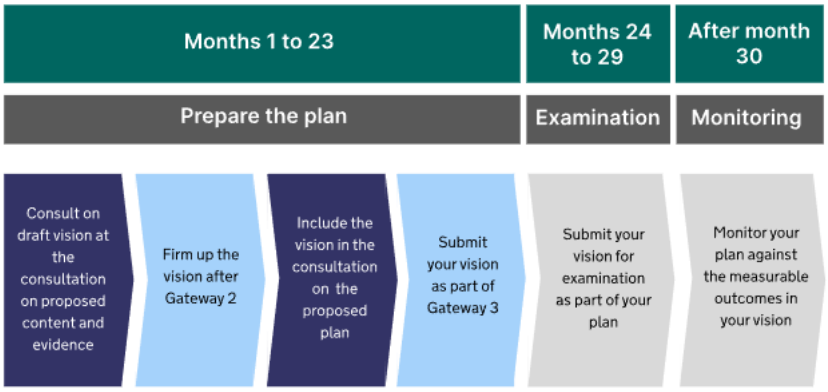
2.8 The diagram illustrates the sequence of key local plan-making steps required as part of the new system.

2.9 This programme can be split into distinct parts:

- Getting ready – before the 30-month process starts (minimum of four months)
- Plan preparation, examination and monitoring

Getting ready

Plan preparation



Key tasks and implications for the Local Plan preparation

2.10 Paragraphs 2.10 – 2.37 set out the key tasks to progress a Local Plan under the 2026 Regulations.

Notice of intention to commence

2.11 Giving notice of your plan-making - GOV.UK

LPAs must publish a notice of intention to commence local plan preparation at least four months before publishing their gateway 1 self-assessment summary, providing advance notice to stakeholders of plan making, where the timetable is published and how they can get involved. There will be a requirement to publish the Local Plan timetable on the same day as the notice, if not before. Details of what the notice of intention covers are as follows (Regulation 19 (2) and (4)):

a) Name of local planning authority who have prepared the notice.
Kirklees Council
b) The geographical area to which the plan will relate.
The Kirklees Local Plan will cover the administrative area of Kirklees Council except for that part within the Peak District National Park.
c) The title you'll use to refer to the plan throughout plan-making.
Kirklees Local Plan
d) Details of where the local planning authority's local plan timetable is published.
Link to website

e) Date on which the notice is made available.
This is subject to Cabinet approval on 24th March 2026. This will be the date the notice is published on our website and made available for inspection

(4) Specify if all or part of a minerals and waste plan will be incorporated into the local plan.
The Kirklees Local Plan will encompass the requirements of a minerals and waste plan.

2.12 Cabinet approval is sought to submit the above details to MHCLG and publish the notice of intention to commence.

Publish the Local Plan Timetable

2.13 A Local Plan Timetable (Regulation 4) incorporating a minerals and waste timetable (Regulation 5) will replace the existing requirement to adopt a Local Development Scheme and will be required to report defined, plan-making milestones including when plan-making steps are undertaken, when consultation periods begin and end and when outputs following Gateways (new requirement) will be published. The timetable must be made available before or alongside the publication of the notice of intention to commence (new requirement).

2.14 The timetable outlined below is based on the revised, key plan making stages and follows the Planning Advisory Service template contained in the Local Plan Project Initiation Document (PID) Template and Guidance: Local Plan Project Initiation Document (PID) Template and Guidance | Local Government Association

2.15 The timetable is ambitious particularly in the light of the publication/consultation of draft revised National Planning Policy Framework (expected to be finalised in Autumn 2026) and the potential for further reforms. Additionally, capacity within the Planning Service is limited particularly with work streams feeding into the Spatial Development Strategy, Mass Transit Spatial Development Framework, Neighbourhood Plans, supporting Development Management on planning consultations and on-going responses to MHCLG consultations.

2.16 The timetable, however, reflects work already undertaken on the Local Plan that can be used as part of the new system, required timelines to be eligible for the new plan-making funding and subject to a successful Gateway 1 self-assessment, the commencement of the 30-month plan-making period from this point. Continued work on the Local Plan will help build confidence with stakeholders and landowners/developers of the council's commitment to plan-led development and having an up-to-date framework to inform planning decisions. The risks of not progressing with an updated timetable is that without this, the council cannot formally commence a plan update under the new system and there is the potential for intervention by the Secretary of State.

Table 1: Proposed revised Local Plan Timetable (provisions for minerals and waste within the Local Plan) (Reg 4 and 5)

Ref	Activity	Indicative Start: Month/Year	Indicative End: Month/Year
Get ready	Developing project management process and structure, governance risk register and ensuring resources are in	Nov 2023 V1. Nov 2024 V2. Sept 2025 v3	

Ref	Activity	Indicative Start: Month/Year	Indicative End: Month/Year
	place to begin the project (including completion of this PID)	Feb 2026	March 2026
Get ready	Scoping, collating and procuring early evidence and scoping strategic environmental assessment	Nov 2023	To date
Get ready	(Statutory) Notice of intention to start plan making (Reg 4 (a))	March 2026 Cabinet to agree	1st April
Get ready	Scoping and production of an engagement strategy/Councillor and key internal and external stakeholder briefings/ early engagement about forthcoming plan production (Reg 4 (b and c))	July 2026 Scoping consultation for 6 weeks July 2026 Member briefings	Aug 2026 Sept 2026
	Call for sites and initial site assessment process	Feb 2020 Call for sites Aug 2025 Site assessments	Aug 2025 July 2026
Get ready	Procuring Strategic Environmental Assessment	Aug 2024	Oct 2024
Get ready	Gateway 1 (Self-Assessment)/Commencement of plan-making (Reg 4 (d))	Oct 2026 To meet funding eligibility	Oct 2026 Latest date for submission to MHCLG is April 2027 (set out in guidance)
Months 1 -23			
Prepare the Plan	Prepare Vision and Strategy for consultation feeding in emerging evidence	Oct 2026	May 2027
Prepare the Plan	Strategic Environmental Assessment Scoping Consultation (note statutory minimums)	March 2025	April 2025
Prepare the Plan	Public consultation on Vision and Strategy (Reg 4 (e) and (f)	June 2027	July 2027
Prepare the Plan	Development of draft plan including responding to consultation and any further evidence gathering	July 2027	April 2028

Ref	Activity	Indicative Start: Month/Year	Indicative End: Month/Year
Prepare the Plan	Councillor and key internal and external stakeholder briefings/ early engagement about next stage of plan production	Sept 2027	March 2028
Prepare the Plan	Gateway 2 (PINS) (Reg 4 (g))	Nov 2027	Dec 2027
Prepare the Plan	Deadline for submission of plan and supporting documents for approval	March 2028	March 2028
Prepare the Plan	Public consultation (8 weeks) on Local Plan (Reg 4 (h) and (i))	April 2028	May 2028
Prepare the Plan	Gateway 3 (PINS) (Reg 4 (j))	Aug 2028	Sept 2028
Months 24-29			
Examination	Plan Submission (Reg 4 (k))	Sept 2028	Sept 2028
Examination	Independent Examination (Indicative)	Oct 2028	March 2029
Month 30			
Adoption	Plan adoption (Indicative) (Reg 4 (l))	April 2029	April 2029

2.17 Regulation 6 of the 2026 Regulations requires “a local planning authority to ensure that their local plan timetable is up to date by no later than the last day of that period”. The periods specified are: “the period of one month beginning with the date on which the local plan timetable is first published” and “each subsequent period of a month thereafter”. Regulation 6 (3) states that “by the end of the same day that a relevant plan preparation stage occurs, a local planning authority must revise their local plan timetable to set out the date on which that stage occurred”.

2.18 The current Local Development Scheme is a Cabinet function. To be able to produce potentially monthly updates of a Local Plan timetable to meet the requirements set out in 2.17 will require delegated authority. Cabinet is asked to approve the Local Plan Timetable as set out in Table 1 and for delegated authority to the Executive Director of Place in consultation with the Finance and Regeneration Portfolio Holder to agree future updates and its publication.

Scoping consultation (Regulation 20)

2.19 Local Planning Authorities must invite representations on matters including what the plan should contain and how future engagement on the plan should be carried out. This must take place after or alongside publishing the notice of intention to commence. Representations must be invited from defined general and specific consultation bodies (defined at pages 2-7 of the 2026 Regulations) and can be made by any persons, including residents. As outlined at 2.6 of this report we can build on the early engagement work already undertaken, however, Regulation 20 states that scoping consultation must be undertaken within the new plan-making process. Consequently, this will require further engagement exercises and some repeated work.

Visioning

2.20 Preparation of the vision should commence before the 30-month process starts, and continue to be updated as the plan progresses. The draft vision, proposed plan content and evidence must be consulted on prior to firming up your vision, which should be used to support the development of your spatial strategy and policies.

2.21 The new sequencing of tasks and the requirement to complete scoping consultation after the notice of intention to start will necessitate further early engagement work to comply with regulations. We will rescope early engagement and visioning in the light of new requirements, to inform a new project plan, timetable and stakeholder engagement strategy including engagement with members. Cabinet is asked to approve delegated authority to the Executive Director of Place in consultation with the Finance and Regeneration Portfolio Holder to commence the scoping consultation and prescribed plan making consultation.

Gateway 1 – self-assessment of readiness for local plan preparation (Regulation 21)

2.22 Gateway 1 is the first of 3 mandatory gateways to support adopting the plan withing 30 months where the LPA will be required to prepare and publish a self-assessment summary of their readiness for local plan preparation. The purpose of the self-assessment is:

- To help ensure that the LPA is ready to prepare and adopt a plan within 30 months.
- To increase transparency of plan preparation for external stakeholders and communities.

2.23 The Gateway self-assessment summary must be:

- No later than 5 years after adopting your existing plan.
- **No sooner than 4 months after the LPA gave notice of plan-making**, or the day after scoping consultation ends (regulation 21 (3).

2.24 There will be five areas set out in regulations to be covered by the Gateway 1 self-assessment:

- Publishing the timetable (Reg 21 (2a))
- Project management and governance arrangements for the preparation of the plan (Reg 21 (2b)).
- The local planning authority's proposed approach to consultation and engagement in preparing the local plan (Reg 21 (2c)).
- The anticipated content of the local planning authority's local plan (Reg 21 (2d)).
- Any obligations arising under Part 2 and Part 3 of the Environmental Assessment of Plans and Programmes Regulations 2004.

Consultation proposed local plan content and evidence – first formal consultation (6 weeks) (Regulation 23)

2.25 Between publication of the scoping consultation summary and beginning Gateway 2, the local planning authority must consult on their proposed local plan content and evidence.

2.26 The proposed local plan content and evidence relevant to this consultation will include:

- A proposed vision for the local planning authority's area and proposed measurable outcomes.
- Any proposed aims and objectives of the local planning authority, including how they propose to achieve the vision.
- A summary of the local planning authority's proposed approach in relation to planning policies (which could include proposed site allocation policies).
- A summary of the evidence intended to support the local plan.
- Any further supporting information the local planning authority considers appropriate.

Gateway 2 – Observations and advice from an appointed person (Regulation 26)

2.27 The regulations require that, between the publication of the summary of consultation on proposed local plan content and evidence and the consultation on the proposed local plan, local planning authorities must seek observations and advice from the Gateway 2 assessor.

2.28 Observations and advice in relation to progress towards preparing a sound plan, in line with the tests of soundness set out in the National Planning Policy Framework; meeting some of the Gateway 3 prescribed requirements; and what further work could be carried out by the local planning authority must be sought.

2.29 The local planning authority must submit to the Gateway 2 assessor the documents and information that it considers necessary to seek this feedback. As soon as is reasonably practicable after receiving the observations and advice, the local planning authority must publish them; notify any person who requested to be notified; and send a copy of the observations and advice to anybody or person identified or referred to in them.

Consultation on the proposed plan – second formal consultation 8 weeks (Regulation 27)

2.30 Between Gateways 2 and 3, local planning authorities must consult on their proposed local plan submission documents, including (but not limited to):

- The proposed local plan.
- The map of proposed local plan policies.
- Details of the evidence gathered to support the proposed local plan
- Details relating to the scoping consultation and consultation on proposed local plan content and evidence, including a summary of the main issues raised by respondents and how those main issues have been addressed in the proposed local plan
- Site allocations.

Gateway 3: Prescribed requirements assessment by an appointed person (Regulation 31)

2.31 To pass Gateway 3, the proposed local plan must meet the prescribed requirements, set out in the regulations at Regulation 32. To help the assessor carry out the Gateway 3 assessment, the local planning authority must submit a statement of compliance. This statement will require the local planning authority to set out matters including how the proposed local plan complies with prescribed requirements.

2.32 A statement of soundness must also be submitted, detailing how the local planning authority considers that its evidence demonstrates that the plan is sound. Soundness will be tested at the examination. The local planning authority must also submit further documents, including:

- A statement setting out a summary of the consultation and engagement activities.
- Their summary of consultation on the proposed local plan.
- An environmental report, where one has been prepared.
- A statement setting out their practical arrangements demonstrating readiness for examination.

2.33 The Gateway 3 assessor must provide their conclusion on whether each prescribed requirement is met in writing, together with an explanation for each conclusion.

2.34 Following confirmation from the Gateway 3 assessor that the prescribed requirements have been met, the local planning authority must make available both a statement confirming that Gateway 3 has been completed and the Gateway 3 submission documents as they were submitted to the Gateway 3 assessor.

Submission (Regulation 34)

2.25 The Local Plan will be submitted to the Planning Inspectorate for independent examination.

Examination

2.26 An independently appointed planning inspector will lead the examination of the Local Plan.

Adoption (Regulation 39)

2.37 The adoption of the Local Plan is a Full Council function.

3. Implications for the Council

3.1 Council Plan

The preparation of the Local Plan will fully consider the vision and objectives of the Council Plan: For Kirklees to be a district which 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.

3.2 Financial Implications

An existing budget for the Local Plan preparation has been agreed, the Total Annual Revenue Base Budget available is £335k, uplifted by £200k as part of the 2026-27 Annual Budget Setting process. There are no additional Local Plan costs associated with commencing plan-making under the new system. If the council is successful in its expression of interest for new plan-making funding this has the potential to be used to reduce the financial commitment associated with plan preparation but also provides capacity to support additional evidence gathering which may arise from the revised national planning policy, further reforms or digital enhancements to support plan making.

3.3 Legal Implications

The new plan-making system has introduced new legislative requirements which the Kirklees Local Plan will need to be progressed against, and the executive functions have been set out in paragraphs 1 and 2.

The following responsibilities of the plan making system are the sole responsibility of full Council:

i) Responsibility for giving instructions to the Cabinet to reconsider the draft plan submitted by the Cabinet for the Council's consideration;
ii) The amendment of the draft development plan document submitted by the Cabinet for the full Council's consideration;
iii) The approval of the draft development plan for the purpose of submission to the Secretary of State for independent examination.
iv) The adoption (with or without modification) of the development plan

3.4 Climate Change and Air Quality

This report addresses the procedural requirements to commence a new Local Plan and in themselves do not directly impact on the climate emergency, reducing emissions and

improving air quality.

The updated Local Plan will be prepared in compliance with National Planning Policy Framework (NPPF). The draft revised NPPF published for consultation (close date 10th March 2026) and expected to be finalised July 2025 provides a clear focus on mitigation and adapting to the impacts of climate change and to support the transition to net zero including proposing development patterns through their spatial strategy and allocations which reduce emissions and avoid increased vulnerability to the effects of climate change, water efficiency standards; and by identifying opportunities to safeguard and improve carbon storage, support nature recovery and resilience. The update of the Local Plan provides the opportunity to look at a revised policy framework that supports the national focus on climate change and mitigation and how planning can support the council's Climate Action Plan.

3.5 Risk, Integrated Impact Assessment (IIA) or Human Resources

Risk

Local Plan risks are assessed and monitored as part of the project Initiation document and potential risks discussed at the Local Plan Project Board and/or with the Executive Director of Place, Service Director for Skills and Regeneration, Head of Planning and the Finance and Regeneration Portfolio holder. Robust project management will form part of the Gateway 1 self-assessment.

Equality Impact/Integrated Impact Assessment (IIA)

Section 149 of the Equality Act 2010 establishes the public sector equality duty (PSED), which requires public authorities to have due regard to the need to:

- Eliminate discrimination, harassment, and victimisation.
- Advance equality of opportunity between those who share a protected characteristic and those who do not.
- Foster good relations between persons who share a relevant protected characteristic and those who do not.

An IIA has been produced for the Local Plan which can be viewed at: Integrated Impact Assessments | Kirklees Council

Additionally, there is a statutory requirement to produce a sustainability appraisal/strategic environmental assessment during the preparation of the Local Plan (this process may be replaced by an Environmental Outcomes Report). The primary purpose is to promote sustainable development by assessing the extent to which the emerging plan when judged against reasonable alternatives contributes to environmental, social and economic objectives as a means of identifying and mitigating any potential adverse effects.

Human Resources

The Local Plan timetable has been set out in the context of existing resources within Planning Policy Team but would also require commitment from a range of service areas to assist with this process. Consultancy support has been factored into the Local Plan budget to support on technical/specialist areas (such as Sustainability Appraisal, and viability).

Armed Forces Covenant

- No impacts.

4 Consultation

4.1 The government introduced the new plan-making regulations following consultation on planning reforms. The council must follow the regulations to ensure a plan that is legally compliant with statutory requirements.

4.2 The new plan-making system sets out new requirements for early engaging/plan scoping and consultation on the plan content and draft plan. These stages are outlined in the report. An engagement plan will be produced to ensure transparency of the processes and when and how stakeholders can become involved.

5 Engagement

5.1 See above.

6 Options

6.1 Options Considered

Option 1 (recommended option) To agree statutory requirements to progress the Local Plan (Recommendation 1) (including notice of intention to commence (Recommendation 2, agree the Local Plan Timetable as set out in Table 1 of the report (Recommendation 3). Agree Recommendations 4, 5, 6 and 7 in relation to delegated authority to progress the Local Plan to meet the government's prescribed time-period of 30-months.

1. That Cabinet approves that a full update of the Kirklees Local Plan commences in accordance with the Town and Country Planning (Local Planning) (England) Regulations 2026.
2. Cabinet approves the submission of a notice of intention to commence the Kirklees Local Plan update to the Ministry of Housing, Communities and Local Government (MHCLG) and its publication (as set out at paragraph 2.11 of this report) (Regulation 19).
3. Cabinet approves an updated Local Plan Timetable as set out at Table 1 of the report and authorises its submission to MHCLG and its publication (Regulation 4 and 5).
4. Cabinet delegates authority to the Executive Director of Place in consultation with the Finance and Regeneration Portfolio Holder to update and publish the Local Plan Timetable monthly or as required to ensure an up-to-date timetable is publicly available (Regulation 6).
5. Cabinet delegates authority to the Executive Director of Place in consultation with the Finance and Regeneration Portfolio Holder to agree commencement of the scoping consultation (Regulation 20).
6. Cabinet delegates authority to the Executive Director of Place in consultation with the Finance and Regeneration Portfolio Holder to approve, submit and publish documents for Gateway 1 self-assessment (Regulation 21), Gateway 2 (Regulation 26) and Gateway 3 (Regulation 31).
7. Cabinet delegates authority to the Executive Director of Place in consultation with the Finance and Regeneration Portfolio Holder to agree the content of and commencement of Consultation: Proposed Local Plan content and evidence, including draft vision (Regulation 23) and Consultation on the proposed local plan (Regulation 27) with feedback brought back to a future Cabinet meeting.

Option 2: To agree statutory requirements to progress the Local Plan (Recommendation 1 (including notice of intention to commence (Recommendation 2), agree the Local Plan Timetable as set out in Table 1 of the report (Recommendation 3). To not agree all or

some of proposed delegation (Recommendations 4, 5, 6 and 7).

The implications of this option are:

- Increased risk of not meeting the 30-month plan period and potential intervention by Secretary of State.
- Inability to provide monthly updates of the Local Plan Timetable as required by the 2026 Regulations.

6.2 **Reasons for recommended Option (Option 1)**

- To comply with new plan-making regulations.
- To ensure compliance that local plans under the new system must give notice of intention to commence by December 31st 2026, and publish Gateway 1 self-assessment by 30th April 2027.
- To agree decision-making processes to support the council's ability to meet the government prescribed plan-making period of 30-months.
- To proceed with the statutory requirement to produce an up-to-date Local Plan that will provide the framework for planning decisions in Kirklees.

7 Next steps and timelines

Cabinet are asked to agree the recommendations set out in the report. Further reports will be brought to Cabinet on the Local Plan.

8 Contact officer

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9 Background Papers and History of Decisions

- Cabinet 17th October 2023 Local Plan Review and Update: 2023-10-17 Local Plan Review-Update Cabinet Report and App1 finaldocx.pdf
- Council 15th November 2023
- Previous Plan-making regulations: The Town and Country Planning (Local Planning) (England) Regulations 2012 as amended: The Town and Country Planning (Local Planning) (England) Regulations 2012
- New Plan-making Regulations: Town and Country (Local Planning) (England) Regulations 2026 with effect from 25th March 2026 The Town and Country Planning (Local Planning) (England) Regulations 2026
- Create or update a local plan using the new system - GOV.UK
- Plan-making regulations explainer - GOV.UK explanation of the what the new regulations are intended to cover.
- More about the new system: the written ministerial statement from 27 November 2025.
- 30-month local plan process: an overview
- Rollout of the new local plan-making system

Starting a local plan

- Getting ready to prepare a new plan
- Giving notice of your plan-making
- Gateway 1: what you need to do
- Gathering baselining information to inform a local plan

Setting your vision and strategy

- What you should consider and how to prepare the vision and strategy for your local plan.
- Preparing a local plan vision

Selecting sites for development

- Introduction to identifying, assessing and selecting sites
- Stage 1: Identifying sites
- Stage 2: Assessing sites
- Stage 3: Determining your draft allocations
- Stage 4: Confirming your draft allocations and recording your decisions

Processing representations

- Using automation to save time processing consultation responses

Local Plan funding - expression of interest guidance

Funding to support Local Plan implementation - GOV.UK

10 **Appendices**

None

11 Service Director responsible

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Kirklees COUNCIL

REPORT TITLE: Corporate Financial Monitoring Report, Quarter 3.

Meeting:	**Cabinet**
Date:	**24th March 2026**
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 3 (month 9), 2025/26.

Recommendations

Cabinet is asked to

1) note the revenue outturn position at Quarter 3 is a forecast overspend of £4.1m (Q2: £5.1m) and that there would be a requirement to balance the budget using reserves should the overspend remain;

2) note the Quarter 3 position on the Dedicated Schools Grant (DSG) is an in year deficit of £17.4m (2024/25 £20m) to take the cumulative deficit to £81.3m;

3) note the Quarter 3 HRA position is a projected underspend of £921k. Any underspends will be taken to HRA reserves at year end. The current forecast year-end reserves position is now £27.4m;

4) note the Quarter 3 forecast capital monitoring position for 2025/26 as set out in the accompanying slides (Appendix 1 slides 42-48 and Appendix 3) and note a proposed net reduction in the 2025/26 position of £14.7m due to:

   - £14.2m re-profiling of spend into future years (£11.6m General Fund and £2.6m HRA)
   - Note £0.5m decrease in the capital plan due to the removal of UKSPF grant.

5) Note the Quarter 3 treasury management prudential indicators (slide 49-62, Appendix 1).

Reasons for Recommendations

This Quarter 3 report updates the Cabinet on the current financial position as of Month 9 (31 December), 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 3 (month 9), 2025/26.

Date signed off by <u>Executive Director</u> & name	**Rachel Spencer Henshall – 12 March 2026**
Is it also signed off by the Service Director for Finance?	**Kevin Mulvaney – 12 March 2026**
Is it also signed off by the Service Director for Legal Governance and Commissioning?	**Sam Lawton – 12 March 2026**

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 3 (month 9), 2025/26.

1.2 Cabinet are advised that the projected overspend at Q3 of £4.1m for the General Fund is the lowest Q3 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)	Q2 Projection (£m)	Q3 Projection (£m)	Outturn (£m)
2022/23	24.6	24.3	29.4	27.0
2023/24	20.3	16.1	9.9	7.3
2024/25	12.9	9.9	9.9	5.6
2025/26	5.9	5.1	4.1	-

1.3 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 in that the majority of the projected overspends relate to delays in delivery of savings. It is recognised however that some significant demand pressures remain, in particular regarding children and adults social care. The 2026/27 budget addresses these demands with an additional £15.2m for adult social care and £5.5m for children who need extra support. A further £3.8m is also being added into the Budget Contingency Reserve in 2026/27 to provide resilience in services that are subject to volatility in demand and to mitigate against any unforeseen slippage in the delivery of agreed savings.

1.4 Whilst there is not a generic council wide recruitment freeze, there do remain internal controls whereby 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.

1.5 All Directors have been reminded of the need to identify actions to reduce the projected overspend. Clearly this position will be kept under review as the year progresses, but should this overspend not be reduced by year end, then the overspend will require funding by reserves.

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 Q3 is a projected overspend of £4.1m after the use of £5.5m of the budget contingency reserve. Within this position, an estimated £8.7m is due to slippage in the approved savings programme across the Council. There is a projected £4.6m of net underspends on business as usual activities.

3.2.2

2025/26 Forecast – Quarter 3

	Revised Budget £000	Forecast Q3 £000	Variance Q3 £000	Variance Q2 £000	Change from Q2 £000
Children and Families	90,026	97,072	7,046	4,754	2,292
Adults and Health	112,654	119,618	6,964	4,502	2,462
Place	59,844	63,728	3,884	3,724	160
Public Health & Corporate Resources	62,695	61,182	(1,513)	(680)	(833)
Central Budgets	63,925	57,121	(6,804)	(1,875)	(4,929)
General Fund	**389,144**	**398,721**	**9,577**	**10,425**	**(848)**
Use of Budget Contingency Reserve*		(5,500)	(5,500)	(5,282)	(218)
Adjusted General Fund Total	**389,144**	**393,221**	**4,077**	5,143	(1,066)

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 Q3 is pressure of £7m (after use of central reserves), an increase of £2.5m since Q2. 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 Q3, there were 42 External Residential Placements, and the average placement cost has increased to £6.7K p/w. These are being managed carefully, but there is potential for the figures to rise. At Q3, the number of Looked After Children (LAC) was 645 (compared to 642 at Q2 and 652 at Q1).

3.2.5 The overall projected position for the **Adults & Health** Directorate is an overspend of £3.7m, after use of budget contingency/inflation reserves.

3.2.6 Within the Adult Social Care related portfolio, there is an overall variance on Business as Usual demand led activities (external provision) of £4.3m, before offset from central inflation reserves. Within this Residential and Nursing care home placements, and Independent Homecare are projecting overspends respectively of £7.8m and £1.1m, offset by underspends on Carers/Emergency Support/Persons From Abroad (£0.4m), and on Shared Lives/Self-Directed Support (£4.2m), the latter in relation to Commissioned Services and Direct Payments. An underspend is being projected across employee budgets (£1.2m).

3.2.7 The reported position is also inclusive of variance of £4.0m against the 2025/26 transformation savings programme. This variance relates to slippage (with the remainder expected to be achieved next year) in delivery rather than non-delivery. It is assumed this slippage is funded by the budget contingency reserve as a one-off solution. There is also a variance in relation to the previous year savings target around income/debt £1.8m not achieved.

3.2.8 There is also an adverse variance in relation to Castle Grange and Claremont House care homes which is being covered by one-off funding from the budget contingency reserve– the delay in their sale has resulted in a slippage in the expected saving against the assumed levels within Adult Social Care and Place.

3.2.9 The Communities and Access portfolio is projecting an underspend of £1.9m, with employee underspends contributing £1.5m of this.

3.2.10 The overall projected position for the **Place** directorate as at Q3 is an overspend of £1.6m after use of budget contingency reserves.

- In Development there is an overspend of £0.1m that largely relates to the management and maintenance of corporate buildings.

- Highways & Street scene is forecast to overspend by £1.9m, with the main pressure areas being Parking £0.7m, Transport £0.4m, Highways £0.3m and Adverse Weather £0.65m.

- Pressures of c£2.1m 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 and additional budget provision will be made in 2026/27.

3.2.11 **Public Health and Corporate Resources** – The projected underspend forecast at Q3 is £1.5m. This is predominantly due to vacancies across the directorate. There are some demand pressures on Legal Services creating a £0.5m overspend, and Housing Benefit Subsidy loss is £0.7m over budget. Positive changes have taken place in terms of numbers of people in bed

and breakfast and temporary accommodation but impacts on the subsidy have not yet materialised.

3.2.12 At Quarter 3 there is a projected underspend of £6.8m in **Central Budgets**. Of this underspend, £2.7m 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 remaining £4.1m is due to a rebate of energy charges relating to PPP schools.

3.2.13 **Budget Contingency Reserve**

The table below summarises the latest position on the budget contingency reserve.

	Q1 (£000)	Q2 (£000)	Q3 (£000)	Total (£000)
Opening Balance	(3,500)	(1,507)	(218)	(3,500)
Additional Contribution	-	(2,000)	-	(2,000)
Home to School Transport	1,560	500	-	2,060
Care Homes	433	216	218	867
Fund Slippage in ASC savings	-	2,573	-	2,573
Balance c/f	**(1,507)**	**(218)**	**-**	**-**

3.2.1 The remaining £0.2m was drawn down from the Strategic Budget Contingency reserve at Quarter 3 leaving a nil balance.

3.2.2 Controls on recruitment remain in place whereby all posts have to be approved for release by Executive Directors, the Head of HR and the S151 officer.

3.2.3 Total forecast usable reserves at 31 March 2026, excluding any impact of this projected overspend are £62.0m, of which £36.0m are identified as earmarked.

Dedicated Schools Grant

3.2.4 The projected outturn position for the DSG at Q3 is an in year overspend of £17.5m which will increase the cumulative deficit to £81.3m. The deficit position has increased by £2.9m from Q2. It should be noted that the overall projected in year deficit is lower than 2024/25 position of £21m. 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.

3.2.5 As part of the Safety Valve agreement the Council will contribute a sum of £2.15m per annum for 5 years from 2025/26 to 2029/30. This is fully provided for in the budget. Members are reminded that the Statutory Override of DSG deficits has been extended to March 2028.

3.2.6 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%.

3.2.7 The Chancellor’s budget in November 2025 stated ‘that the government will set out substantial plans for reform of special educational needs provision early in the new year to deliver a

sustainable system. The 2025 Spending Review provided investment for SEND reform. Future funding implications will be managed within the overall government DEL envelope, such that the government would not expect local authorities to need to fund future special educational needs costs from general funds, once the Statutory Override ends at the end of 2027-28. The government will set out further details on its plans to support local authorities with historic and accruing deficits and conditions for accessing such support through the Local Government Finance Settlement'. Councils are expecting this White Paper in early 2026. Members will be provided updates on the implications.

3.2.8 The Government has confirmed in the final settlement that the Statutory Override will end in March 2028. They have also confirmed they will fund a significant proportion (90%) of the historic deficits accrued to March 2026 that are shown as negative unusable reserves on the Council's Balance Sheet. Payments for this deficit will be made during the second half of the next financial year after Government agrees management plans with Councils. Further updates will be provided once there is more information available from Government.

HRA

3.2.9 The projected outturn for the HRA at Quarter 3 is a forecast underspend of £921k. 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 ongoing disrepair cases. Budgets are in place to address the requirements of Awaab's Law which was introduced in October 2025. Charges to tenants and leaseholders for recovery of costs for communal services continue to be monitored and future charges will be made to achieve a full cost recovery position.

Quarter 3 Capital

3.2.10 The budget for the Capital Plan was set at £239.4m within the Council Budget Report 2026/27, split between General Fund at £200.2m and HRA at £39.2m (Council 25.02.26). The Capital Plan is under a continual review in terms of re-profiling slippage into future years in line with Financial Procedure Rules 3.8-3.14, with the aim of narrowing the gap between the reported in-year capital budget and forecast outturn for 2025/26. Since the Council Budget Report the 2025/26 capital budget has reduced by a further £14.7m. This consists of identified slippage of £14.2m (General Fund £11.6m, HRA £2.6m) being re-profiled into subsequent financial years and a decrease in UKSPF grant allocation of £0.5m within the Highways Capital Plan. A detailed breakdown of the changes can be found in Appendix 3.

3.2.11 The Council's revised capital budget at Quarter 3 for 2025/26 is £224.7m.. summarised in the Table below and Appendix 1 slides 42-45:

2025/26 Capital Forecast – Quarter 3

	Budget Report £000	Re-profile / Change £000	Revised Budget £000	Actual Costs £000	Forecast M9 £000	Variance M9 £000
Children and Families	23,563	0	23,563	17,140	23,563	0
Adults and Health	4,829	(123)	4,706	2,631	4,706	0
Place	163,281	(11,197)	152,084	96,201	152,084	0
Public Health & Corporate Resources	8,484	(779)	7,705	1,633	7,705	0
General Fund	**200,157**	**(12,099)**	**188,058**	**117,605**	**188,058**	**0**
Housing Revenue Account	**39,215**	**(2,596)**	**36,619**	**22,719**	**36,619**	**0**
Council Total	**239,372**	**(14,695)**	**224,677**	**140,324**	**224,677**	**0**

Kirklees COUNCIL

3.2.12 The overall capital funding position will be updated at year end, based on the final actual spending for the financial year. It should be noted that early indicators of actual expenditure as at Quarter 3 are £40.8m ahead of last year (£140.3m for 2025/26 compared to £99.5m in 2024/25), which highlights the progress to date in delivering the capital plan. 26% of the General Fund spend to date relates to the Cultural Heart (£31m). Also, the current capital spend to date of £140.3m is roughly on par with the overall Capital Outturn position at the end of the last financial year at £140.6m (General Fund £105.7m, HRA £34.9m).

3.2.13 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

3.2.14 The multi-year Capital plan currently stands at £1.39bn overall split between General Fund at £961m and HRA at £429m. The capital plan is updated to take account capital slippage totalling £14.2m from 2025/26 into 2026/27 onwards and changes in the overall estimated levels of resources available of £0.5m in 2025/26 with remaining years status quo. There are no injections into the Capital Plan. The refreshed Capital plan and changes in funding across years are shown in Appendix 1 slides 46-48.

Refreshed Capital Plan 2025/26-2031/32 – Quarter 3

	2025/26 £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000	2029-30 £'000	2030-33 £'000	Total £'000
Children and Families	23,563	34,941	19,851	4,703	2,750	2,500	**88,308**
Adults and Health	4,706	1,014	1,000	0	0	0	**6,720**
Place	152,084	221,587	132,846	103,466	93,513	90,816	**794,312**
Public Health & Corporate Resources	7,705	8,422	5,861	10,418	10,826	28,374	**71,606**
General Fund	**188,058**	**265,964**	**159,558**	**118,587**	**107,089**	**121,690**	**960,946**
Housing Revenue Account	**36,619**	**62,381**	**71,043**	**87,572**	**93,555**	**78,193**	**429,363**
Council Total	**224,677**	**328,345**	**230,601**	**206,159**	**200,644**	**199,883**	**1,390,309**

3.2.15 Directorates will continue to be challenged, and the opportunity will be taken at year end to review the deliverability of the overall capital plan, prioritise schemes and amend budgets across years. The Capital Plan will be presented to Cabinet and Council as part of the Financial Outturn Report.

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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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
Annual budget report 2026-28 to Budget Council, 25 February 2026
Quarter 1 Financial Monitoring report to Cabinet, 9 September 2025
Quarter 2 Financial Monitoring report to Cabinet, 2 December 2025

10 Appendices

Appendix 1: Financial Monitoring slides
Appendix 2: Savings Plan slides
Appendix 3: Breakdown of Capital Budget Changes Since Council Budget Report 2026/27

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

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2025/26 Revenue Budget Monitoring – Quarter 3

Revenue Headlines

- Projected overspend of **£4.1m.** A decrease of £1m from Q2
- 2025/26 Savings forecast to be delivered at 71% of the target of £30.2m (£26.8m 25/26 and £3.4m prior years)
- Savings slippage is significant element of total overspend

- Total Useable Reserves of £**62m** at 31st March 2026 of which:
- Unallocated reserves of **£26m**
- Earmarked Reserves of **£36m**

2025/26 Forecast – Quarter 3

	Revised Budget £000	Forecast Q3 £000	Variance Q3 £000	Variance Q2 £000	Change from Q2 £000
Children and Families	90,026	97,072	7,046	4,754	2,292
Adults and Health	112,654	119,618	6,964	4,502	2,462
Place	59,844	63,728	3,884	3,724	160
Public Health & Corporate Resources	62,695	61,182	(1,513)	(680)	(833)
Central Budgets	63,925	57,121	(6,804)	(1,875)	(4,929)
General Fund	**389,144**	**398,721**	**9,577**	**10,425**	**(848)**
Use of Budget Contingency Reserve*		(5,500)	(5,500)	(5,282)	(218)
Adjusted General Fund Total	**389,144**	**393,221**	**4,077**	5,143	(1,066)

£2.0m transferred into Budget Contingency Reserve in Q2 from inflation budgets no longer required. Total potential reserve usage now £5.5m

Kirklees COUNCIL

2025/26 Net Variance Analysis – Quarter 3

	Savings Slippage £000	Net Pressures £000	Total Variance £000
Children and Families	1,505	5,541	7,046
Adults and Health	5,929	(2,185)	3,744
Place	997	607	1,604
Public Health & Corporate Resources	296	(1,809)	(1,513)
Central Budgets	-	(6,804)	(6,804)
General Fund	**8,727**	**(4,650)**	**4,077**
Total Variance at Quarter 2	**6,669**	**(1,526)**	**5,143**
Change from Quarter 2	**2,058**	**(3,124)**	**(1,066)**

* Saving figure includes both 25/26 and previous years saving slippage

Children and Families

Child Protection & Family Support

Key Budget Variances – Quarter 3

Child Protection & Family Support – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£37,314k	£41,483k	£4,169k	£1,027k
Income	(£4,303k)	(£7,248k)	(£2,945k)	(£153k)
TOTAL	£33,011k	£34,235k	£1,224k	£874k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Front Door, EDS, Family Help	5,722	-168	-74	• Employee vacancies, staff turnover	
Assessment & Intervention / CDS	12,922	1,050	+923	• Savings linked to employee vacancies and turnover (£289k) • Budget pressure related to short term care packages with significant needs prior to care placement or prevention from entering care +£422k • Home to school transport linked to demand, complexity and spot purchase arrangements +£152k • Emergency temporary bed and breakfast accommodation +£78k • £500k CDS Domiciliary care package savings target will not be achieved this year. Significant surge in demand for care packages with complexity of need + £786k. Service under review.	Review of commissioned support for children with additional needs

Children and Families

Child Protection & Family Support

Key Budget Variances – Quarter 3

Child Protection & Family Support – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£37,314k	£41,483k	£4,169k	£1,027k
Income	(£4,303k)	(£7,248k)	(£2,945k)	(£153k)
TOTAL	£33,011k	£34,235k	£1,224k	£874k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Corporate Parenting	12,965	364	+183	• 18+ Leaving Care Supported Accommodation placements awaiting tenancies or in need of transitional support prior to independence +£301k • Home to school transport pressure due to increased demand, complexity of routes involving escort supervision, travel distance, breakdown in unworkable contracts and replaced with spot purchase at higher cost +£373k • Employee vacancies, turnover savings (£178k) • (UASC and UASC LC estimated underspending on grant award and NTS Incentive payments for early placement subject to HO validation (£56k). • Savings on demand led Adoption allowances (£96k)	• New procurement developments to be rolled out in late summer may deliver efficiency savings for home to school transport costs tbc
Contextual Safeguarding & YES	1,974	-89	-89	• Employee vacancies and turnover savings	
Management and Support	-730	65	+65	• Unachieved vacancy management, turnover savings	
TOTAL	**32,853**	**1,222**	**+1,008**		

Children and Families

Resources, Improvements & Partnership

Key Budget Variances – Quarter 3

Resources, Improvements & Partnership – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£45,712k	£5,770k	£7,058k	£2,842k
Income	(£5,616k)	(£6,981k)	(£1,365k)	(£1,113k)
TOTAL	£40,096k	£45,789k	£5,693k	£1,729k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Sustainability, Capacity & Resourcing	33,866	5,753	+1,844	• Continued increase in demand for external residential and unregulated placement accommodation. Placement numbers @ 31/12/25 = 42 including 8 unregulated placements (but with further growth expected). Weekly fees range between £4,583 and £14,000 (but expected tp rise) with an average cost of £6,707pw +£5,709m • Unachieved efficiency savings due to slippage in opening Field View and Woodlands. • +£675k overspending on 16/17 Leaving care supported accommodation. Placement numbers = 45. Average weekly cost £1,995. • Potential saving on family residential assessments based on in year trends to date = (£431k) • Savings on Connected Person carer allowances (£136k)	• Re opening of Woodlands in December • 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 • Developed in relation to " edge of care provision " to reduce children coming into care and reunification • Work ongoing with Police re increase in PPO's and alternative processes to reduce number of children coming into care
Other Commissioning Services	2,517	83	+83	• Slippage on £150k Commissiong savings target = +£50k, overspending on OAWY contract	
Management & Support	363	-57	-57	• Net saving attached to vacant RI&P Service Director post assumed to 31st December 2025	
TOTAL	36,746	5,779	+1,870		

Children and Families

Learning & Early Support

Key Budget Variances – Quarter 3

Learning & Early Support – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£371,484k	£407,400k	£35,916k	£11,145k
Income	(£354,565k)	(£390,352k)	(£35,787k)	(£11,456k)
TOTAL	£16,919k	£17,048k	£129k	(£311k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Early Years Sufficiency	640	-99	-20	• Early Years grant income to fund posts not yet recruited to, will be addressed before year end	
Access to Education	923	-104	-224	• Previous overspend forecast cleared due to higher than expected income on penalty notices, up £170k from Q2	
Education Psychology	1,410	67	+5	• Pressure relates to use of Locum staff to support team, the use of these staff is reducing.	
EHCP Team	1,992	245	-5	Main areas of £245k pressure include: • increased pressure on Staffing Costs +£104K • EHCP reporting commission extended +£28k • Compensation costs +£36K	
ChYPS SLA	30	81	+51	• £50k share of £150k additional childrens savings applied at P9 to forecast	
TOTAL	4,995	190	-193		

Adults and Health

Older People & Physical Disabilities

Key Budget Variances – Quarter 3

Older People & Physical Disabilities – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£111,120k	£110,673k	(£447k)	£638k
Income	(£114,837k)	(£110,798k)	£4,039k	£2,428k
TOTAL	(£3,717k)	(£125k)	£3,592k	£3,066k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Assessment & Care Management	9,584	-915	-129	Staffing £-932k (Independence £-529k, Community £-298k, Care Navigation £-105k)	
Demand led client provision – Placements – OP & PD (core budget)	29,331	5,822	+2,295	Can be difficult to procure in the current market at standard rates due to increased complexity (e.g. additional 1:1 often required). Avg unit prices per week in excess of budget, notably on PD (£1,639 per wk vs budget of £808 per wk). Increased pressure is being seen from neurodivergent clients on this and other activities.	Ongoing commissioning focus (alongside transformation workstreams) through Fair Price approach with the market.
Demand led client provision – Placements – OP & PD (savings programme)	2,000	1,500	0	In-year transformation savings slippage on Fees and Top-ups workstream (part achievement this year, with remainder to be achieved next year).	Recovery plan in place re market fees/top ups savings slippage, project moving to market engagement phase
Demand led client provision – Home Care (OP and PD)	21,809	2,178	+377	Over on PD (+1,677k) due to volumes and unit cost, and on OP (+414k) due to unit costs. Note – Now includes £+447k of in year transformation savings slippage (to be achieved next year).	Ongoing commissioning focus (alongside transformation workstreams). Note – was £+2.5m variance at month 9 2024-25.
Demand led client provision – Self Directed Support	4,121	-1,565	+1,098	Under on PD Commissioned services (-403k) due to lower volumes (but over on unit costs). Under on OP (-112k) & PD (-736k) Direct Payments (lower volumes)	
Demand Led client provision – Emergency Support	1,010	-306	+166	OP under on net unit cost (but partially offset by PD over on unit cost).	
Demand Led – ASC Funding	-72,604	-3,751	-3,751	National Funding allocations – no variance expected + drawdown from central inflation and budget reserves	
Demand Led Client service provision – savings target	-2,627	1,832	0	Partial achievement on the income/debt target of -£2,627k	Ongoing review of processes, pathways and charging and debt recovery models.

Adults and Health

Learning Disabilities & Mental Health

Key Budget Variances – Quarter 3

Learning Disabilities & Mental Health – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£120,404k	£121,099k	£695k	£477k
Income	(£37,453k)	(£37,126k)	£327k	(£1,178k)
TOTAL	£82,951k	£83,973k	£1,022k	(£701k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Assessment & Care Management	5,959	-921	-19	Employee underspend £-770k	
Demand led client provision – Placements – LD	32,448	3,960	-162	Over on volumes and net weekly cost (+£100 p/wk). Note – includes £+123k of in year transformation savings slippage (to be achieved next year).	Ongoing commissioning focus (alongside transformation workstreams) through Fair Price approach with the market.
Demand led client provision – Placements – MH	10,115	154	+193	Under on activity	Ongoing commissioning focus (alongside transformation workstreams / review of packages)
Demand led client provision – Home Care (LD and MH)	3,199	-311	-42	Under on LD due to volumes, and under on MH due to volumes. Note – includes £+40k of in year transformation savings slippage (to be achieved next year).	Note – was £+0.7m variance at month 9 2024-25.
Demand led client provision – Self Directed Support, and Shared Lives	30,588	-1,754	-603	Under on MH (-1,400k) Commissioned services due to lower volumes and lower unit cost, and on Shared Lives (volume). Offset by LD Commissioned Services (£+1,403k due to higher weekly unit costs). Direct Payments are under on LD (£-198k) and MH £-438k) both with lower volumes (but partially offset by higher unit costs on LD). Note – Now includes £+1,126k of in year transformation savings slippage (achieved next year).	Note – was £+3.1m variance at month 9 2024-25.
TOTAL	82,309	1,128	633		

Adults and Health

Strategic Commissioning, Partnerships & Provider Services

Key Budget Variances – Quarter 3

Adults Sufficiency – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£45,728k	£46,973k	£1,245k	£367k
Income	(£18,857k)	(£19,068k)	(£211k)	(£110k)
TOTAL	£26,871k	£27,905k	£1,034k	£257k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Demand led Client Service Provision	12,395	-244	-128	Under on several contracted services and In-house Day Care, over on Extra Care housing.	Extra Care budget assumptions being reset alongside service model and client profile
In-house residential	6,248	1,379	+570	Over on Ings Grove, Moorlands Grange (mainly employees). Includes variance on Castle Grange and Claremont House (in addition to savings delay). Offset by underspend on Brighton St (employees).	Ongoing management and review of employee budgets and spending, (including corrections on staffing allowances built into budgets), along with continuing work around potential external transfer of Castle Grange and Claremont (assumed savings shortfall funded by reserves). Strategic review of the bed base across Ings and Moorlands underway as endorsed by the ICB, this is with a view to equalising the current cost and risk absorbed by the Council
Reablement	890	-125	-79	Under on employees (£-188k)	Ongoing review of demand and complexity, alongside implementation of new pathways following pathway redesign
Contracts Management and Commissioning	1,352	-197	-80	Under on employees.	
TOTAL	20,885	813	+283		

Adults and Health

Communities & Access Services

Key Budget Variances – Quarter 3

Communities & Access Services – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£19,037k	£17,449k	(£1,588k)	(£52k)
Income	(£9,268k)	(£9,584k)	(£316k)	(£271k)
TOTAL	£9,769k	£7,865k	(£1,904k)	(£323k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Community Plus	1,726	-241	-65	Mainly employee underspend (£-184k)	
Personalised Care	-36	-300	-300	Additional use of reserve funding (one off)	
Integrated Wellness	364	-211	-27	Mainly employee underspend	
Library & Information Centres	4,451	-535	-184	Mainly employee underspend. Temporary vacancies - posts in recruitment	
Improvement & Relationships	575	-284	-24	Customers & Community Project Team (-226k), CSE Strategic Commission (-60k). Mainly employee underspend	
Communities	2,065	-226	+7	Communities Infrastructure & Response (-52k), Safer Kirklees (-88), Migration & Resettlement (-68k). Mainly employee underspend	
Community Languages	-159	65	+21	Surplus achieved of £-94k but short of target level of £-159k	
TOTAL	8,986	-1,732	-572		

Place

Skills & Regeneration

Key Budget Variances – Quarter 3

Skills & Regeneration – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£16,359k	£15,663k	(£696k)	£430k
Income	(£13,094k)	(£12,914k)	£180k	(£770k)
TOTAL	£3,265k	£2,749k	(£516k)	(£340k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Business & Economy (incl. Business & Enterprise Centres)	-66	28	-57	• Under-recovery of rental income at The Glass Box / Batley Business Park • Over-recovery of income at Bretton St • Under-spend on planning and unplanned repairs and maintenance at Business and Enterprise Centres	• Holding of vacancies / net salaries in Business and Economy
Employment & Skills	1,447	-138	-62	• Under-spends on net salaries • Offset by a forecasted over-spend to supplement Grant Match Budgets.	• Holding of vacancies
Planning & Building Control	1,608	-219	-165	• Under-spends on salaries • Over-recovery of Planning Performance Agreement income • Under-recovery on Planning Applications, Building Control Planning Fees, and Building Control Inspection Fees	• Holding of vacancies
Major Projects	276	-187	-57	• Under-spend on net salaries • Over-spend on miscellaneous other costs	
TOTAL	3,265	-516	-341		

Place

Development

Key Budget Variances – Quarter 3

Development – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£33,273k	£38,762k	£5,489k	£573k
Income	(£23,296k)	(£28,661k)	(£5,365k)	(£1,008k)
TOTAL	£9,977k	£10,101k	£124k	(£435k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Corporate Landlord	9,101	-24	-99	• Over-spend on sites identified in 25-26 Budget Savings £301k – Knowl House, The Hudawi Centre, Castle Grange APH, Claremont House – offset by Reserve drawdown £220k • Over-spend on Business Rates at other sites £113k – various minor overspends • Over-spend on water charges across portfolio £156k	• Continuing to undertake emergency repairs / health and safety critical work only. • Review internal Time master charging across whole of Property. • Transfer of Care Homes subject to independent juridical review • Hudawi CAT progressing through legal process
Landbank	416	391	-37	• Over-spend on the Former Wetside £112k – Rates and service charges • Over-spend on Riverbank Court prior to disposal £25k • Over-spend on Business Rates at other sites £85k – various sites • Over-spend on Security at Landbank Sites £56k • Over-spend on CCTV at Landbank Sites £59k	• Liabilities for the Former Wetside now gone as part of KDSL settlement. • Exploring option to demolish Former Birkdale High School in 26/27 • Former Gomersal First School disposed of February 2026. • Former Huddersfield Central Library transferred to BAM in October 2025.
Capital Delivery	-1,424	-185	+55	• Reduced income forecast owing to vacancies held in the team.	• Balance filling vacancies against workload

Place

Development

Key Budget Variances – Quarter 3

Development – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£33,273k	£38,762k	£5,489k	£573k
Income	(£23,296k)	(£28,661k)	(£5,365k)	(£1,008k)
TOTAL	£9,977k	£10,101k	£124k	(£435k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Assets and Estates	-1,265	99	-219	• Net liability of holding remainder of Piazza Shopping Centre £300k – Rates / Service Charges • Over-spend on Rates, Cleaning charges (Contract Cleaning at Commercial Sites) and Trade Waste • 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	6,828	281	-300		

Place

Highways & Streetscene

Key Budget Variances – Quarter 3

Highways & Streetscene – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£88,663k	£90,902k	£2,239k	£1,637k
Income	(£57,926k)	(£58,240k)	(£314k)	(£806k)
TOTAL	£30,737k	£32,662k	£1,925k	£831k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Parking	-3,891	688	-107	• Employee Vacancies (£254k) • Shortfall on Tariff Income £486k • Permits £66k • **Supplies & services £424k** – Fees - Ringo, Flowbird, Bank charges. Car park joint ventures • Fines (£49k)	
Transport	2,645	360	+41	• Employee Vacancies (£298k) • Sale of old vehicles £150k • Fuel £128k • Raw materials £191k • Additional Vehicles £99k • H & N Income (£133k) • Accident repairs £119k	• £340k budget provision made in 25/26 to reflect impact of ageing fleet
Waste Services	26,847	-29	+181	• Employee vacancies (£1,254k) • Agency staff £1,193k • Transport £711k • Property £70k • **Supplies & Services £215k** - Closed Landfill sites handed back. Additional costs • Suez Contract (£516k) **External Income (£333k)** – Trade Waste (£139k) Garden Waste (£115k), Schools recycling (£77k) • **Internal Income (£105k)** – Landscape architects	• 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 3

Highways & Streetscene – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£88,663k	£90,902k	£2,239k	£1,637k
Income	(£57,926k)	(£58,240k)	(£314k)	(£806k)
TOTAL	£30,737k	£32,662k	£1,925k	£831k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Parks & Greenspaces	2,773	-140	-36	• Vacancies (£458k) • **Supplies & Services £569k** – GAT - Animal care £41k, Machinery £176k , Raw materials (£25k), Xmas decorations £15k, Professional service £176k, Sub contractors £27k, Shrubs Trees & Plants £175k. • **External Income £3k-** Bequests £71k, Scrap/Obsolete (£17k), Allotments rents (£25k), Amenity Builds rents £15k, Woodlands DEFRA (£18k), CFT Northern Forest (£15k), DSP Water restoration (£13k) • **Internal Income (£267k)-** Staff recharge revenue (£20k), Int recharge SLA - GAT Volunteers (£15k), GM Highways (£19k), GM Housing (£65k), WRFD Tree Planting Prog External (£135k)	
Highways Services	461	340	+20	• Service Employees (including agency) £287k • External Recoveries (£960k) • Internal Recharges to Capital £1,082k • Highways Trading Account - £0 (Employees (£1,736k), Transport (£34k), Operational Costs (£1,534k) offset reduced trading income £3,354k • Grounds Maintenance £201k • UMS Energy Costs (£200k) • Other (£70k)	• Capitalise Reactive Maintenance, Small Walls and Safety Guard Railing • Reviewing Highway Operations overheads on certain job codes to maximise income • Reviewing current fees and charges • Reviewing levels of staff capital recoveries • Enforcement review • Seek new revenue funding opportunities • Review new commuted sum opportunities

Place

Highways & Streetscene

Key Budget Variances – Quarter 3

Highways & Streetscene – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£88,663k	£90,902k	£2,239k	£1,637k
Income	(£57,926k)	(£58,240k)	(£314k)	(£806k)
TOTAL	£30,737k	£32,662k	£1,925k	£831k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Adverse Weather	1,536	650	+650	• No winter activity in April 2025. Costs at M9 @ £725k lower by £433k than equivalent period in 25/26.	• Budget assumes normal winter levels around gritting and one extra grit bin refill. • Assumes continuation with hired fleet in 2025-2026 until new fleet arrives early 2026-2027
TOTAL	30,371	1,869	+749		

Place

Environmental Strategy & Climate Change

Key Budget Variances – Quarter 3

Environmental Strategy & Climate Change – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£20,412k	£20,581k	£169k	£124k
Income	(£2,559k)	(£2,714k)	(£155k)	(£96k)
TOTAL	£17,853k	£17,867k	£14k	£28k

Service Area46k	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Directorate Programme Office	3,903	-264	-169	• Vacancies in Business Support and Directorate programme	
School Transport	12,762	196	+196	• **Transport £111k-** Post 16 taxi £14k, Bus passes £28k, Pre 16 taxis £27k, Looked after children £33k • **Personal budgets £137k –** Post 16 £88k, Pre 16 £49k • **External Income (£74k) –** Post 16 School transport charges £18k, Looked after children £78k)	
Environmental Health	2,726	62	+52	• Vacancies (£111k) • Cleckheaton £62k • Clearance of Batley Warehouse £72k • **External Income (£35K)** Defra grant (£13k), Rodent control £26k, Chargeable repairs (£36k) • **Internal Income (£36k)** Gas referrals H& N	
Climate change	-142	30	-40	• Vacancies (£134k) • Additional staff recharge capital (£35k) • EV salary Sacrifice £84k • Income shortfall WYCA GS £99k	
TOTAL	19,249	24	+39		

Public Health and Corporate Resources

Strategy & Innovation

Key Budget Variances – Quarter 3

Strategy & Innovation – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£24,659k	£23,893k	(£766k)	£3k
Income	(£5,080k)	(£5,139k)	(£59k)	£4k
TOTAL	£19,579k	£18,754k	(£825k)	£7k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
IT	12,330	-36	+80	• Postage costs +£296k (savings target shortfall) • Vacancies offset the bulk of the pressure -£314k • Phone/Circuits -£100k, Income -£76k • Software +£184k due to M365 upgrade likely to happen in final quarter	Further work to be carried out with services to reduce postage and move customers to online alternatives
Policy, Partnerships and Corporate Planning	2,600	-342	-25	• Vacancies	
Strategic Communications	1,385	-206	-23	• Vacancies	
Date and Insight	1,985	-129	-26	• Vacancies offset by income reduction	
Transformation	1,278	-112	+2	• Vacancies	
TOTAL	19,578	-825	+8		

Public Health and Corporate Resources

Public Health & People

Key Budget Variances – Quarter 3

Public Health & People – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£42,200k	£45,611k	£3,411k	£623k
Income	(£35,938k)	(£40,207k)	(£4,269k)	(£833k)
TOTAL	£6,262k	£5,404k	(£858k)	(£210k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Peoples Service	9,824	-709	-61	• Vacancies including Kirklees Direct and additional income from salary sacrifice	
TOTAL	9,824	-709	-61		

Public Health and Corporate Resources

Governance & Commissioning

Key Budget Variances – Quarter 3

Governance & Commissioning – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£19,388k	£20,238k	£850k	(£130k)
Income	(£4,562k)	(£5,184k)	(£622k)	£82k
TOTAL	£14,826k	£15,054k	£228k	(£48k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Legal Services	4,655	525	+20	• 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 (+£535k)	Work ongoing to improve recruitment of permanent staff and reduce usage of locums and other external services.
Risk	4,153	-237	-29	• Vacancies	
TOTAL	8,808	288	-9		

Public Health and Corporate Resources

Finance

Key Budget Variances – Quarter 3

Governance & Commissioning – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£15,020k	£14,764k	(£256k)	(£177k)
Income	(£5,116k)	(£5,065k)	£51k	(£4k)
TOTAL	£9,904k	£9,699k	(£205k)	(£181k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Welfare and Exchequer	6,862	-151	-132	• Vacancies offset by cost of debt tracing, audit fees, software, and some reduced income levels.	
TOTAL	6,862	-151	-132		

Public Health and Corporate Resources

Benefit Payments

Key Budget Variances – Quarter 3

Benefit Payments – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£64,011k	£53,545k	(£10,466k)	(£514k)
Income	(£57,492k)	(£46,326k)	£11,166k	£514k
TOTAL	£6,519k	£7,219k	£700k	-

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Housing Benefit Subsidy	6,519	700	0	Trend in HB payments and slight delay to additional properties at Ashenhurst. Units on the site have now been filled from other forms of TA	Ashenhurst units are let and the current level of overspend is beginning to stabilise. Work ongoing to understand the impacts of claimable subsidy, and discussions with other LAs around further options to reduce subsidy impact. Ongoing work to assess viability of transferring Ashenhurst into HRA
TOTAL	6,519	700	0		

Public Health and Corporate Resources

Culture & Visitor Economy

Key Budget Variances – Quarter 3

Culture & Visitor Economy – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£40,658k	£39,500k	(£1,158k)	(£51k)
Income	(£35,053k)	(£34,448k)	£605k	(£350k)
TOTAL	£5,605k	£5,052k	(£533k)	(£401k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Culture and Tourism	2,517	-264	-152	• Vacancies across Markets, Museums, and Arts and Creative Development	
Town Halls and Public Halls	736	-127	+7	• Vacancies	
Catering	896	-321	-250	• Vacancies offset by lost income	
Bereavement Services	-2,483	218	+164	• Reduced income (cremations) offset by vacancies	Work ongoing to understand the impact of direct cremations which are increasing, and whether business lost to alternative providers.
TOTAL	**1,666**	**-494**	**-231**		

Central

Key Budget Variances – Quarter 3

Central – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£66,207k	£59,731k	(£6,476k)	(£4,929k)
Income	(£4,282k)	(£4,610k)	(£328k)	-
TOTAL	£61,925k	£55,121k	(£6,804k)	(£4,929k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Treasury Management	37,005	-2,694	-822	Slippage in capital plan, interest rates on borrowing to date lower than budgeted. WYCA gainshare contributes to funding of OCH	Further savings likely due to additional slippage of plan
Inflation	5,971	-4,100	-4,100	Rebate of energy charges (multi-year) relating to PPP schools	
TOTAL	**42,976**	**-6,794**	**-4,922**		

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	(1,000)		(1,000)
	(26,046)	**(43,324)**	**(69,370)**
In Year Adjustments – Quarter 3			
- Net Drawdown from Earmarked Reserves	-	4,839	4,839
- Drawdown from Transformation reserve	-	2,500	2,500
Balance of Reserves at 31st March 2026	**(26,046)**	**(35,985)**	**(62,031)**

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

Reserves Summary (£k)	Reserves 31st March 2025	Budget report Movements	Revised reserves 1st April 2025	Forecast Drawdowns at Q3	Reserves 31st March 2026
Ward Based Activity	(577)	-	(577)	-	(577)
Place Standard	(402)	-	(402)	33	(369)
Transformation	(1,480)	(2,500)	(3,980)	2,500	(1,480)
Development Funding	(914)	-	(914)	38	(876)
Revenue Grants	(17,998)	-	(17,998)	1,275	(16,723)
Stronger Families Grant	(688)	-	(688)	-	(688)
Other	(3,942)	-	(3,942)	(7)	(3,949)
Voluntary Revenue Provision	(6,504)	(4,819)	(11,323)	-	(11,323)
Strategic Budget Contingency Reserve	(3,500)	-	(3,500)	3,500	-
Total Earmarked Reserves	(36,005)	(7,319)	(43,324)	7,339	(35,985)
Unallocated Balances	(25,046)	(1,000)	(26,046)	-	(26,046)
Total Useable Reserves	***(61,051)***	***(8,319)***	***(69,370)***	***7,339***	***(62,031)***
Statutory Reserves – Schools Balances	(11,119)	-	(11,119)	324	(10,795)
Statutory Reserves – Public Health	(896)	-	(896)	-	(896)
Grand Total All Reserves	***(73,066)***	***(8,319)***	***(81,385)***	***7,663***	***(73,722)***

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 3

	Revised Budget £000	Forecast Q3 £000	Variance Q3 £000	Variance Q2 £000	Change from Q2 £000
Repairs & Maintenance	31,309	30,752	(557)	(197)	(360)
Housing Management	44,369	43,372	(997)	(336)	(661)
Property Services	(190)	(190)	0	0	0
Other Finance and Overhead Expenditure	34,048	33,871	(177)	(264)	87
Total Expenditure	**109,536**	**107,805**	**(1,731)**	**(797)**	**(934)**
Rent & Other Income	(109,536)	(108,726)	810	70	740
Revenue Contribution to Capital Funding	0	4,125	4,125	6,460	(2,335)
Planned transfer from HRA Reserves	0	(4,125)	(4,125)	(6,460)	2,335
Total	**0**	**(921)**	**(921)**	(727)	(194)

HRA Reserves

	Balance at 31 March 2025 £000	Q3 Forecast Movement in reserves £000	Planned transfer in/ out reserves £000	Balance at 31 March 2026 £000
Set aside for business risks	(10,800)	(410)	0	(11,210)
Repairs Reserve	(1,000)	0	0	(1,000)
Set aside to meet investment needs (as per HRA business plan)	(18,846)	(521)	4,125	(15,232)
Total	**(30,646)**	**(921)**	**4,125**	**(27,442)**

HRA

Housing Management & Partnerships

Key Budget Variances – Quarter 3

HRA – Quarter 3	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£14,390k	£14,406k	£16k	£147k
Income	(£95,696k)	(£96,171k)	(£475k)	-£41k
TOTAL	(£81,306k)	(81,765k)	(£459k)	£106k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
HMP Management Cost	9,869	-419	-193	• -523k underspend for staffing • +£200k RTB costs due to the increased number of applications/sales	Review of service delivery for Housing Management
HMP Repairs and Maintenance	2,520	-126	-95	• PPP Safety and Security £40k • Reduced rechargeable repairs £66k • EH hard to let properties £20k	
Housing PFI	263	-36	-14	• Changes to assumed Inflation costs for PFI contract	Cost £11.553m, PFI grant £7.912m, Rent £2.332m, Service Charge income £1.082m
Service Charges	1,738	597	+449	The variance reflects the latest reported income position against budget, subject to reconciliation with the CX system, to be confirmed. The main variances are : • Concierge - £476k due to end of contract payment • District heating – under recovery forecast of £158k, costs not factored into the review of tariff in January 25. Plan to review these quarterly in future.	There is a shortfall of £2.4m. • £500k Communal lighting • £506k Concierge • £250k District Heating. Forecast could reduce to £158k based on revised average forecasts. • £1.4m Grounds Maintenance These will be reviewed as we move to a full cost recovery position.
Rental income	-95,022	-427	-24	Additional income due to charging affordable rents on additional properties.	
Rents for Garages, non dwellings and other income	-674	-48	-17	Variance includes • Shops and other non dwelling income of £48k	
TOTAL	-81,306	-459	106		

HRA

Property Services & Repairs

Key Budget Variances – Quarter 3

HRA – Quarter 3	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£22,540k	£23,049k	£509k	£140k
Income	-	-	-	-
TOTAL	£22,540k	£23,049k	£509k	£140k

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Property Services surplus	-190	-	-	• On target to achieve budgeted surplus	Forecast Property turnover of £45.4m, trading costs of £31.7m and overheads of £13.5m
Management costs for DMC and voids	1,925	50	+50	• Staffing overspend of £42k • Transport costs overspend of £8k	
Property repairs and Maintenance Costs	18,612	-167	-31	Variance relates to • -£350k reduction in DMC now BAU • £270K increase for empty homes • -£70k reduction in responsive non-PPP • -£17k reduction in rechargeable repairs	DMC move to BAU and increased costs to address the backlog of voids. Some DMC costs still being reported as void costs.
Temporary Accom Costs	301	185	+54	Variance relates to repairs costs for properties used for temporary accommodation	Needs a further review to determine what is driving the overspend. No of orders or costs?
Rent loss from voids	1,892	441	+67	Budget based on 2% void rent loss. Full reconciliation of void rent loss required on CX to confirm position	Dedicated voids management team and performance improving, turnaround time is reducing and numbers of voids has reduced
TOTAL	22,540	509	140		

HRA

Governance & Improvement

Key Budget Variances – Quarter 3

HRA – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£4,321k	£3,849k	(£472k)	(£125k)
Income	-	-	-	-
TOTAL	£4,321k	£3,849k	(£472k)	(£125k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
G&I Management Costs	3,966	-459	-150	Reason for variance • -£283k underspend service improvement staff and £11k overspend on Management • £53k overspend on Tenant publications • -£152k underspend on internal charging, training, pool cars and office expenses • -£65k spend/grant tenant engagement	
Valuation, subscription costs and Regulatory fees	355	-13	+25	• Reason for variance is a reduction to the budgeted subscription fees.	
TOTAL	4,321	-472	-125		

HRA

Asset Management

Key Budget Variances – Quarter 3

HRA – Quarter 3				
	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£12,810k	£12,460k	(£350k)	(£532k)
Income	-	-	-	-
TOTAL	£12,810k	£12,460k	(£350k)	(£532k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Asset Team management costs	2,452	-44	-184	• -£376k underspend for staffing costs • £354k reduction in planned capitalised costs left in revenue	Budget originally included £1.9m for staff capitalisation. Review of agency staff and appointment of permanent employees.
Assets repairs and maintenance	10,127	-280	-340	• £50k for lift servicing not previously budgeted for • -£300k stock condition surveys commenced later than expected due to procurement • -£40k underspend on works to garages	
Miscellaneous properties, shops and abortive costs	231	-26	-8	• Forecast underspend on abortive costs due to limited active development works.	
TOTAL	12,810	-350	-532		

HRA

HRA/H&N Overheads

Key Budget Variances – Quarter 3

HRA – Quarter 3	Revised Budget	Forecast	Variance	Change from Previous
Expenditure	£41,635k	£41,486k	(£149k)	(£192k)
Income	-	-	-	-
TOTAL	£41,635k	£41,486k	(£149k)	(£192k)

Service Area	Net Budget £000	Variance £000	Change from Previous £000	Reason for Variance	Mitigating Actions
Finance Costs	30,800	-238	-236	Finance costs include Depreciation £23.989m, Interest Payable £7.122m and Interest rec £735k. Positive variance relates to a refinanced loan reducing the interest payment.	
Corporate services and recharges	8,282	29	-1	HGF recharge £30k based on full compliment of staff. will be amended to actual at year end.	Provision set aside to provide for disrepair. More detail required on cases resolved to allocate. Actual staffing costs will be charged for internal recharges
Council Tax on empty properties	829	360	+45	Charges for properties to be demolished/refurbished and being held for decants	Costs for High rise to be demolished will be capitalised but currently included in the overspend.
Bad debt and inflation provision	1,724	-300	-	Forecast reduced based on planned write offs which is lower than expected.	
TOTAL	41,635	-149	-192		

DSG Headlines

High Needs Funding 2025/26

- High Needs Block Allocation £65.4m
- Safety Valve Funding £2.3m
- Schools Block Transfer £3.6m
- Early Years Block Transfer £0.5m
- General Fund Contribution £2.1m
- Total Available £73.9m
- Projected High Needs Expenditure £91.4m – Increase of £2.9m from Q2
- Projected In Year Deficit **£17.5m**

- Opening 25/26 Cumulative Deficit Position £63.8m
- In Year 25/26 Deficit £17.5m
- Projected 25/26 Closing Cumulative Deficit **£81.3m**

DSG Dashboard

	Active Placements	M9 (£'000)	M6 (£'000)
Mainstream Top-Ups	1,869	20,602	18,665
Special School Top-Ups	880	19,674	19,576
Special School Place Funding		7,158	7,072
Additional Resource Provisions (including Central Staff)	199	8,288	7,998
Alternative Provision		7,120	6,963
Independent Placements	229	14,586	14,527
OLA Placements	27	663	573
Post 16	635	5,400	5,300
SENDIF		1,000	1,000
Personal Budgets		3,100	3,100
Contributions to Services		3,145	3,255
OLA Mainstream		712	601
Total Projected Expenditure		91,448	88,630

DSG Headlines

Key Reasons for pressure:

- Independent School Place numbers and costs continue to increase
- 24/25 Outturn position was 209 placements, cost £12.1m – this is now increased to 237 places, cost £14.6m
- Average cost per placement has increased from £57.7k to £61.5k
- Whilst costs are significant in other areas, this is the area of spend where the most significant savings/cost reductions could be made
- Increase at Q3 from Q2 is mainly due to confirmation of Autumn Revisions in Mainstream School Top Up's alongside increased costs for ARPs due to opening of New Mill ARP

Mitigations:

- Additional Capacity Is being created via ARPs and Satellite Provision
- More robust approach to allocation of mainstream top up funding
- Implementation and development of Cluster Approach

Collection Fund (Council Share)

At Quarter 3, there is a forecast in-year deficit position for both Council Tax and NNDR.
This leaves an estimated £2.3m Collection Fund deficit at the end of 2027/28 based on current budgeted repayments from General Fund. This will need to be funded in the MTFS.

Q3 Position	Council Tax £k	Business Rates £k	Total £k
(Surplus)/Deficit at 1 April 2025	**4,848**	**5,307**	**10,155**
Re-payments to/(from) General Fund 2025/26	(2,051)	(1,737)	(3,788)
Estimated In year Financial Performance	800	1,500	2,300
Estimated (Surplus)/Deficit at 31 March 2026	**3,597**	**5,070**	**8,667**
Planned repayments from General Fund 2026-28	(2,797)	(3,570)	(6,367)
Adjusted (Surplus)/Deficit	**800**	**1,500**	**2,300**

Collection Fund (Council Share)

Council Tax

- Estimated in-year deficit £0.8m due to higher than budgeted bad debt provision requirement
- Forecast deficit equivalent to 0.3% of £253m budgeted income

Business Rates (NNDR)

- Estimated in-year deficit £1.5m due to lower than budgeted income; largely due to increased unfunded reliefs
- Forecast deficit equivalent to 2.8% of £53m budgeted income

Capital Headlines

- Capital budget **£224.7m**
- Reduction of budget since Budget Report -£14.7m due to:
  - -£14.2m re-profile (General Fund -£11.6m, HRA -£2.6m)
  - -£0.5m Grant (General Fund)

    (Appendix 3)

Officers continue to review the multi-year capital plan and budget profiles (under FPR 3.8-3.14)

2025/26 Capital Forecast – Quarter 3

	Budget Report £000	Re-profile / Change £000	Revised Budget £000	Actual Costs £000	Forecast M9 £000	Variance M9 £000
Children and Families	23,563	0	23,563	17,140	23,563	0
Adults and Health	4,829	(123)	4,706	2,631	4,706	0
Place	163,281	(11,197)	152,084	96,201	152,084	0
Public Health & Corporate Resources	8,484	(779)	7,705	1,633	7,705	0
General Fund	**200,157**	**(12,099)**	**188,058**	**117,605**	**188,058**	**0**
Housing Revenue Account	**39,215**	**(2,596)**	**36,619**	**22,719**	**36,619**	**0**
Council Total	**239,372**	**(14,695)**	**224,677**	**140,324**	**224,677**	**0**

Kirklees COUNCIL

2025/26 Capital Spend to Date – Quarter 3

	Q3 Revised Capital Budget £'000	Actual Costs to Date £'000	Variance to Date (Actual Spend) £'000
Learning & Early Support	23,113	16,746	(6,367)
Resources, Improvement and Partnerships	450	394	(56)
Children and Families	**23,563**	**17,140**	**(6,423)**
Customers & Access Services	111	1	(110)
Learning Disabilities & MH	4,360	2,632	(1,728)
Adults Social Care Operation	235	(2)	(237)
Adults & Health	**4,706**	**2,631**	**(2,075)**

2025/26 Capital Spend to Date – Quarter 3

	Q3 Revised Capital Budget £'000	Actual Costs to Date £'000	Variance to Date (Actual Spend) £'000
Skills & Regeneration	39,368	25,175	(14,193)
Development	84,879	51,515	(33,364)
Highways & Streetscene	26,391	19,143	(7,248)
Environmental Strategy & Climate Change	1,446	368	(1,078)
Place	**152,084**	**96,201**	**(55,883)**
Strategy & Innovation	6,936	1,473	(5,463)
Culture & Visitor Economy	769	160	(609)
Public Health & Corporate Resources	**7,705**	**1,633**	**(6,072)**
Housing Revenue Account	**36,619**	**22,719**	**(13,900)**

Kirklees COUNCIL

Refreshed Capital Plan 2025/26-2031/33 – Quarter 3

	2025/26 £'000		2026/27 £'000	2027/28 £'000	2028/29 £'000	2029-30 £'000	2030-33 £'000	Total £'000
Children and Families	23,563		34,941	19,851	4,703	2,750	2,500	**88,308**
Adults and Health	4,706		1,014	1,000	0	0	0	**6,720**
Place	152,084		221,587	132,846	103,466	93,513	90,816	**794,312**
Public Health & Corporate Resources	7,705		8,422	5,861	10,418	10,826	28,374	**71,606**
General Fund	**188,058**		**265,964**	**159,558**	**118,587**	**107,089**	**121,690**	**960,946**
Housing Revenue Account	**36,619**		**62,381**	**71,043**	**87,572**	**93,555**	**78,193**	**429,363**
Council Total	**224,677**		**328,345**	**230,601**	**206,159**	**200,644**	**199,883**	**1,390,309**

The capital plan is updated to take account capital slippage totalling £14,206k from 2025/26 into 2026/27 onwards and changes in the overall estimated levels of resources available of +£489k in 2025/26 with remaining years status quo.

Kirklees COUNCIL

Refreshed Capital Plan 2025/26-2031/33 – Quarter 3
General Fund (Funding Summary)

	2025/26 £'000		2026/27 £'000	2027/28 £'000	2028/29 £'000	2029-30 £'000	2030-33 £'000	Total £'000
Capital Grants / S106/ Contributions	96,850		144,486	61,971	48,202	46,449	39,083	**437,041**
Revenue Contributions to Capital	5		0	0	0	0	0	**5**
Capital Receipts	6,377		11,059	9,033	5,390	5,390	2,000	**39,249**
Service Funded Prudential Borrowing	4,898		18,735	13,140	12,423	4,050	1,000	**54,246**
Corporate Prudential Borrowing (GF)	79,928		91,684	75,414	52,572	51,200	79,607	**430,405**
General Fund Funding	**188,058**		**265,964**	**159,558**	**118,587**	**107,089**	**121,690**	**960,946**

Kirklees COUNCIL

Refreshed Capital Plan 2025/26-2031/33 – Quarter 3
Overall Funding Change

	2025/26 £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000	2029/30 £'000	2030/33 £'000	Total £'000
BUDGET CAPITAL PLAN	**239,372**	**314,138**	**230,602**	**206,159**	**200,644**	**199,883**	**1,390,798**
GF Re-profiling (Borrowing)	(1,500)	1,501	(1)	0	0	0	0
GF Re-profiling (Grant/S106)	(560)	560	0	0	0	0	0
GF Re-profiling (Receipts)	(9,550)	9,550	0	0	0	0	0
GF Grant Reduction	(489)	0	0	0	0	0	(489)
General Fund Changes	(12,099)	11,611	(1)	0	0	0	(489)
HRA Borrowing Re-profile	(214)	214	0	0	0	0	0
HRA Receipts Re-profile	(55)	55	0	0	0	0	0
HRA Reserves Re-profile	(2,327)	2,327	0	0	0	0	0
Housing Revenue Changes	(2,596)	2,596	0	0	0	0	0
Total Change	**(14,695)**	**14,207**	**(1)**	**0**	**0**	**0**	**(489)**
Q3 REVISED CAPITAL PLAN	**224,677**	**328,345**	**230,601**	**206,159**	**200,644**	**199,883**	**1,390,309**

Prudential & Treasury Management Indicators

Quarter 3 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	188.0	212.6	102.5
Housing Revenue Account	35.0	36.7	71.1	63.0
Total Capital expenditure	**140.6**	**224.7**	**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	796.4	1,046.6	1,099.8
Housing Revenue Account	207.0	203.0	206.5	203.3
Total Capital Financing Requirement	**939.3**	**999.4**	**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 30.12.2025 £m
Debt (incl. PFI & leases)	864.5	913.3	1,176.1	1,226.1	881.7
Capital Financing Requirement	939.3	999.4	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 Q3 2025/26	Debt at 31.12.25	2025/26 Authorised Limit	2025/26 Operational Boundary	Complied
Borrowing	799.5	791.2	1,024.7	1,004.7	Yes
PFI and Finance Leases	90.5	90.5	91.6	86.6	Yes
Total debt	**890.0**	**881.7**	**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 Forecast £m	2026/27 budget £m	2027/28 budget £m
Total net income from service and commercial investments	-1.2	-1.1	-2.0	-2.0
Proportion of net revenue stream	-0.3%	-0.3%	-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)	36.9	41.3	52.9	60.2
General Fund – Proportion of net revenue stream	9.9%	10.2%	12.7%	13.8%
HRA – Financing costs (£m) – (including depreciation)	34.8	35.0	35.3	36.3
HRA - Proportion of net revenue stream	32.6%	32.0%	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.

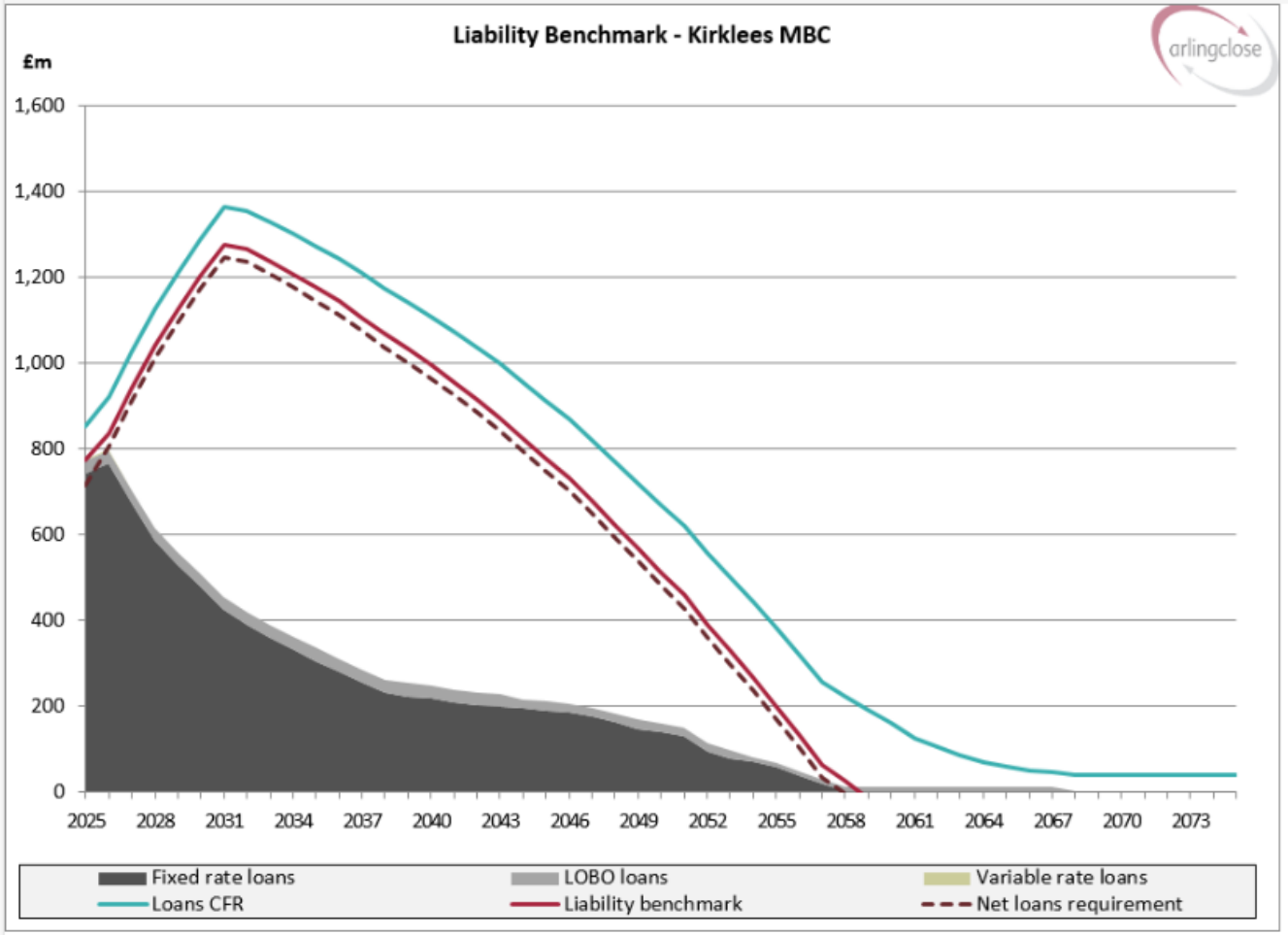
- Following on from the medium-term forecast below, the long-term liability benchmark includes capital expenditure funded by borrowing of £84.8 million in 2025-26, minimum revenue provision based on assets lives and reduction in balance sheet resources of £18.2 million.

	31.03.25 actual £m	31.03.26 forecast £m	31.03.27 forecast £m	31.03.28 forecast £m
Loans CFR	849.7	920.0	1,027.0	1,127.0
Less: Balance sheet resources	-134.3	-116.1	-116.0	-115.0
Net loans requirement	**715.4**	**803.9**	**911.0**	**1,012.0**
Plus: Estimated Liquidity allowance	58.6	30.0	30.0	30.0
Liability benchmark	**774.0**	**833.9**	**941.0**	**1,042.0**
Existing borrowing - committed	**774.0**	**781.9**	**687.0**	**601.2**

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 2032 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	31.12.25 actual	Complied
Under 12 months	25%	0%	4%	Yes
12 months and within 24 months	25%	0%	13%	Yes
24 months and within 5 years	60%	0%	24%	Yes
5 years and within 10 years	80%	0%	21%	Yes
10 years and above	100%	20%	38%	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 £20.9 million have a potential repayment date during 2025-26 and have been included in the under 12 months line and an option of £10.0 million has a potential repayment date during 2026-27 and has been including in 12 months and within 24 months

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	31/12/25
Bank Rate	4.50%	3.75%
1-year PWLB certainty rate, maturity loans	4.82%	4.37%
5-year PWLB certainty rate, maturity loans	4.94%	4.78%
10-year PWLB certainty rate, maturity loans	5.38%	5.34%
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 Quarter 3

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**	**Change in Variance from previous £000**	**RAG change from previous report**
Children and Families	(3,860)	(2,094)	(2,355)	1,505	Some slippage	550	⇔
Adults and Health	(14,256)	(7,019)	(10,209)	4,047	Slipped	1,281	⇔
Place	(3,756)	(893)	(3,304)	452	On Track	101	⇔
Public Health and Corporate Resources	(2,981)	(2,585)	(2,685)	296	On Track	0	⇔
Central Budgets	(2,000)	(2,000)	(2,000)	0	Complete	0	⇧
All Directorates	**(26,853)**	**(14,591)**	**(20,553)**	**6,300**		**1,932**	
Housing Revenue Account	(3,785)	(1,952)	(3,261)	524	On Track	**181**	⇔
Total Directorates + HRA	**(30,638)**	**(16,543)**	**(23,814)**	**6,824**		**2,113**	

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	**29**	**3**	**(7,659)**	**(7,790)**	**(131)**
On track – high level of confidence that full savings will be delivered	**24**	**-7**	**(6,365)**	**(6,585)**	**(220)**
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.	**9**	**-1**	**(2,398)**	**(2,022)**	**376**
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.	**18**	**5**	**(14,216)**	**(7,417)**	**6,799**
TOTAL	**80**	**0**	**(30,638)**	**(23,814)**	**6,824**

Changes since previous reporting period - Summary	**Number of proposals**
Proposals moved in positive direction (e.g. from Red to Amber)	**4**
Proposals moved in a negative direction (e.g. from Amber to Red)	**7**

Total 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**	**Change in Variance from previous £000**
Children and Families	1,505	0	1,505	550
Adults and Health	4,047	1,882	5,929	1,331
Place	452	545	997	101
Public Health and Corporate Resources	296	0	296	0
Central Budgets	0	0	0	0
All Directorates	**6,300**	**2,427**	**8,727**	**1,982**
Housing Revenue Account	524	0	524	181
Total Directorates + HRA	**6,824**	**2,427**	**9,251**	**2,163**

Monthly Savings Monitoring – Children and Families

Quarter 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	Change in Variance from previous £000	RAG change from previous
CF2501	Resources, Improvements & Partnerships	Mainstream MST approaches in Family Help	(589)	(589)	(589)	0	Complete	Achieved in full	0	⇔
CF2502	Family Support and Child Protection	Review Family Help Resources	(199)	(199)	(199)	0	Complete	Achieved in full by using Social Care Prevention grant	0	⇔
CF2504	Resources, Improvements & Partnerships	Rationalise Capacity in the LADO service	(60)	(60)	(60)	0	On Track		0	⇔
CF2505	Resources, Improvements & Partnerships	C&K Careers & Children's commissioning contracts	(150)	0	(100)	50	Slipped	£50k saving unlikely to be achieved	50	⇩
CF2505	Learning and Early Support	C&K Careers & Children's commissioning contracts	(150)	(150)	(150)	0	Complete	Achieved in full	0	⇔
CF2506	Learning and Early Support	Rationalise Early Years Functions	(200)	(200)	(200)	0	Complete	Achieved in full	0	⇔
CF2507	Learning and Early Support	Rationalisation of Community Hub Coordinators	(465)	(410)	(410)	55	May Slip	Some legacy staff remain on payroll to mid July, so £120k pressure will remain in 25/26, offset by anticipated £65k share of new hubs grant, may be further offset by savings across Early Support in vacancies	0	⇔
CF2508	Resources, Improvements & Partnerships	Mainstream the compliments and complaints function	(161)	0	(161)	0	On Track	Proposed savings identified	0	⇔

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	Change in Variance from previous £000	RAG change from previous
CF2509	Resources, Improvements & Partnerships	Reduction in residential out of area placements	(900)	0	0	900	Slipped	Unlikely to be achieved in current financial year, MTFS addresses this	0	⇔
CF2510	Family Support and Child Protection	Review the way Children with disabilities are supported in the community	(500)	0	0	500	Slipped	Saving will not be achieved this year. Service have commissioned a consultancy firm to review current assessment practices and processes	500	⇩
TOTAL CHILDREN AND FAMILIES NEW SAVINGS			**(3,374)**	**(1,608)**	**(1,869)**	**1,505**			**550**	

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	Change in Variance from previous £000	RAG change from previous
24CF1	Family Support & Child Protection	Integration for Support to Keep Families Together	(87)	(87)	(87)	0	Complete	Achieved in full	0	⇧
24CF1	Learning and Early Support	Integration for Support to Keep Families Together	(345)	(345)	(345)	0	Complete	Achieved in full	0	⇔
24CF23	Learning and Early Support	Virtual School for Children Looked After – embedding of additional duties	(54)	(54)	(54)	0	Complete	Achieved in full	0	⇔
TOTAL CHILDREN AND FAMILIES PRIOR YR APPROVED			**(486)**	**(486)**	**(486)**	**0**			**0**	
TOTAL CHILDREN AND FAMILIES 25/26 SAVINGS			**(3,860)**	**(2,094)**	**(2,355)**	**1,505**			**550**	

Monthly Savings Monitoring – Adults and Health

Quarter 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	Change in Variance from previous £000	RAG change from previous
AH2501	Strategic Commissioning, Partnership & Provider Services	Transfer the dementia long stay residential homes owned by the Council to a private sector operator	(645)	0	(645)	0	Slipped	Delay due to judicial review – ongoing (offset from central reserves for 25/26 only)	0	⇔
AH2504	Strategic Commissioning, Partnership & Provider Services	Kirklees Better Outcomes Partnership reductions in contract value	(500)	(500)	(500)	0	Complete	New contract level as at April - achieved.	0	⇔
AH2505	Learning Disabilities & Mental Health	Staffing – Review of turnover/vacancy factor allowances	(427)	(320)	(427)	0	On Track	Budgets reviewed and reset - will be achieved through the year	0	⇔
AH2505	Older People & Physical Disabilities	Staffing – Review of turnover/vacancy factor allowances	(108)	(81)	(108)	0	On Track	Budgets reviewed and reset - will be achieved through the year	0	⇔
TOTAL ADULTS AND HEALTH NEW SAVINGS			**(1,680)**	**(901)**	**(1,680)**	**0**			**0**	

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	Change in Variance from previous £000	RAG change from previous
24AH2	Strategic Commissioning, Partnership & Provider Services	Explore the future of learning disabilities Supported Living Schemes provided by the Council	(252)	0	(252)	0	On Track	Programme underway - expected to be achieved	0	⇔
24AH7	Older People & Physical Disabilities	Kirklees Integrated Community Equipment Service (KICES)	(400)	(400)	(400)	0	Complete	Achieved	0	⇔
24AH9	Older People & Physical Disabilities	Staffing Savings across Adults and Health	(70)	(53)	(70)	0	On Track	Budgets reviewed and reset - will be achieved through the year	0	⇔
24AH9	Learning Disabilities & Mental Health	Staffing Savings across Adults and Health	(270)	(203)	(270)	0	On Track	Budgets reviewed and reset - will be achieved through the year	0	⇔
24AH13	Learning Disabilities & Mental Health	Contracting & Commissioning Workstream – Day Service Framework	(250)	0	(122)	128	Slipped	Ongoing - expected to be achieved but some will land in 2026-27	81	⇔
24AH13	Learning Disabilities & Mental Health	Contracting & Commissioning Workstream – Respite Framework	(500)	0	(79)	421	Slipped	Ongoing - expected to be achieved but some will land in 2026-27	52	⇔
24AH13	Learning Disabilities & Mental Health	Contracting & Commissioning Workstream – Domiciliary Care Contract Improvements	(1,000)	(254)	(600)	400	Slipped	Ongoing - expected to be achieved but some will land in 2026-27	0	⇔
24AH13	Learning Disabilities & Mental Health	Contracting & Commissioning Workstream – Review of Care Homes Market	(2,000)	0	(500)	1,500	Slipped	Ongoing - expected to be achieved but some will land in 2026-27	0	⇔
24AH13	Strategic Commissioning, Partnership & Provider Services	Contracting & Commissioning Workstream - Contracts	(40)	(40)	(40)	0	Complete	Achieved	0	⇔
24AH14a	Learning Disabilities & Mental Health	Reviewing Shared Lives Provision to mitigate costs elsewhere in Adult Social Care.	(447)	(33)	(283)	164	Slipped	Ongoing - expected to be achieved but some will land in 2026-27	(36)	⇔

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	Change in Variance from previous £000	RAG change from previous
24AH17	Communities and Access Services	Community Based Integrated Library and customer service functions & assets	(110)	(110)	(110)	0	Complete	Achieved	0	⇔
24AH23	Strategic Commissioning, Partnership & Provider Services	Ings Grove – exploring partnership delivery options	(1,099)	(1,099)	(1,099)	0	On Track	To be achieved through alternate review of budgets (employees) for 25/26	0	⇔
NEWAD1	Communities and Access Services	Integrated Community and Access Model	(272)	(272)	(272)	0	Complete		0	⇔
NEWAD2a	Older People & Physical Disabilities	Confident and Consistent Practice – Targeted Review (OP/PD)	(850)	(980)	(1,055)	(205)	Slipped	Ongoing - expected to be achieved but some will land in 2026-27	(306)	⇔
NEWAD2b	Learning Disabilities & Mental Health	Confident and Consistent Practice – Targeted Review (LD/MH)	(1,250)	(216)	(275)	975	Slipped	Ongoing - expected to be achieved but some will land in 2026-27	826	⇔
NEWAD2c	Older People & Physical Disabilities	Confident and Consistent Practice – Financial Delegation Scheme	(3,000)	(1,999)	(2,457)	543	Slipped	Ongoing - expected to be achieved but some will land in 2026-27 (see also transitions line).	543	⇩
NEWAD2d	Older People & Physical Disabilities	Confident and Consistent Practice – Temporary Increases	(250)	(71)	(250)	0	On Track	Programme underway - expected to be achieved	0	⇔
NEWAD2e	Older People & Physical Disabilities	Confident and Consistent Practice – Direct Payments	(232)	(105)	(111)	121	Slipped	Programme underway - expected to be achieved across years	121	⇩
NEWAD2f	Older People & Physical Disabilities	Confident and Consistent Practice – Transitions Pathways	(160)	(160)	(160)	0	On Track	Programme underway - expected to be achieved (see also Financial Delegation Scheme line)	0	⇔

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	Change in Variance from previous £000	RAG change from previous
NEWAD3	Strategic Commissioning, Partnership & Provider Services	Work with wider health/care system to reflect cost and design	(124)	(124)	(124)	0	Complete	Achieved	0	⇔
TOTAL ADULTS AND HEALTH PRIOR YEAR APPROVED			**(12,576)**	**(6,118)**	**(8,529)**	**4,047**			**1,281**	
TOTAL ADULTS AND HEALTH 25/26 SAVINGS			**(14,256)**	**(7,019)**	**(10,209)**	**4,047**			**1,281**	

Monthly Savings Monitoring – Place

Quarter 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	Change in Variance from previous £000	RAG change from previous
AH2501	Development	Corporate Landlord savings re Adults Dementia Proposal	(220)	0	(220)	0	Slipped	Offset by reserve drawdown	0	⇔
PL2503	Development	Reduction in grounds maintenance	(125)	0	(2)	123	Slipped	Pressure in Trees Maintenance	47	⇩
PL2504	Development	Asset transfer of the Hudawi Centre	(75)	0	(19)	56	Slipped	Asset likely to be held until December 2025	0	⇔
PL2505	Development	Housing Growth – Maximising Existing Funding	(180)	0	0	180	Slipped	Offset by Salaries under-spend in 25-26	180	⇔
PL2506	Development	Housing - Delete Vacant posts	(80)	0	(80)	0	On Track		0	⇔
PL2508	Development	TransPennine Rail Upgrade Income	(150)	(246)	(281)	(131)	Complete	Achieved – income received at Month 9	(131)	⇧
PL2509	Development	Asset Strategy - Delete Vacant posts	(100)	(100)	(100)	0	Complete	Achieved – underspend on salaries	0	⇧
PL2510	Development	Charging to Capital	(50)	0	(50)	0	Slipped	Slipped- Offset by overachieving income on internal charging	0	⇩
PL2511	Development	Knowl House – Mothball	(72)	0	(31)	41	Slipped	Asset being held	5	⇔
PL2512	Environmental Strategy & Climate Change	School Transport – Additional Transformation Savings beyond existing	(156)	0	(156)	0	Slipped	Significant demand pressure. Additional budget given £1.5m & £0.5m from reserve	0	⇔
PL2514	Environmental Strategy & Climate Change	Changes to night-time noise service	(70)	(70)	(70)	0	Complete		0	⇔

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	Change in Variance from previous £000	RAG change from previous
PL2515	Environmental Strategy & Climate Change	Electric Vehicle Salary Sacrifice Scheme – NI savings	(89)	(4)	(6)	83	Slipped	Updated forecast 25/26, rest slipped into 26/27	0	⇔
PL2516	Environmental Strategy & Climate Change	Review of council wide support services	(400)	(144)	(400)	0	May Slip	The remaining amount of this saving is organisational wide. Saving has been achieved by removal of posts £144k	0	⇔
PL2524	Highways & Streetscene	Trade Waste Charge Review	(95)	(95)	(95)	0	Complete		0	⇔
PL2525	Highways & Streetscene	Highways & Streetscene – Charges to Capital	(155)	0	(155)	0	On Track		0	⇔
PL2528	Highways & Streetscene	Efficiencies Related to Council Service Cars and Bookable Pool Cars	(100)	0	0	100	Slipped	Unachievable without removing all remaining pool & service cars which would have a critical impact on children & adult services	0	⇔
PL2529	Skills & Regeneration	Review of management across the service	(155)	0	(155)	0	On Track		0	⇔
PL2531	Skills & Regeneration	Reduction in Support to Business – match funding reduction	(50)	0	(50)	0	On Track		0	⇔
PL2532	Skills & Regeneration	Major Projects income	(50)	0	(50)	0	On Track		0	⇔
PL2533	Development	Utilisation of Neighbourhood capital grant funding	(40)	0	(40)	0	May Slip	Offset by Salaries under-spend in 25-26	0	⇔
TOTAL PLACE NEW SAVINGS			**(2,412)**	**(659)**	**(1,960)**	**452**			**101**	

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	Change in Variance from previous £000	RAG change from previous
24GR4	Development	Corporate Landlord-Proportionate reduction in staffing post asset rationalisation	(510)	0	(510)	0	On Track	Forecasted to achieve breakeven on salaries	0	⇔
24EC19	Highways & Streetscene	Household Waste Recycling Centre Opening Hours Review	(134)	(134)	(134)	0	Complete		0	⇔
24EC14 & NEWEN 2	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 & £0.5m from reserve	0	⇔
NEWEN 7	Highways & Streetscene	Waste Strategy Efficiencies	(100)	(100)	(100)	0	Complete		0	⇔
TOTAL PLACE PRIOR YEAR APPROVED			**(1,344)**	**(234)**	**(1,344)**	**0**			**0**	
TOTAL PLACE 25/26 SAVINGS			**(3,756)**	**(893)**	**(3,304)**	**452**			**101**	

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	Change in Variance from previous £000	RAG change from previous
HNHMP1a	Housing Management and Partnerships	Service Charge Review – Communal Grounds Maintenance	(725)	(121)	(302)	423	Slipped	Increase in service charge income for grounds maintenance pushed back from 1st April to 1st November. Being funded from HRA savings.	0	⇔
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.	0	⇔
HNHMP2a	Housing Management and Partnerships	Personal Heat and Water Charges	(573)	(226)	(302)	271	May Slip		271	⇩
HNHMP2b	Housing Management and Partnerships	Service Charge Review	(267)	(200)	(267)	0	On Track		0	⇔
HNHMP3	Housing Management and Partnerships	Housing Management Savings – Staffing	(80)	(80)	(80)	0	On Track		0	⇔
HNHMP4	Housing Management and Partnerships	Council Tax Charges on Empty Properties	(50)	0	0	50	May Slip	Under review as to whether council tax should be charged. In contact with the valuation office.	50	⇔
HNHMP5	Housing Management and Partnerships	Move to decorating vouchers for works to void properties	(500)	(550)	(720)	(220)	On Track		(140)	⇔
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	0	⇔
HNAM01	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.	0	⇔

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	Change in Variance from previous £000	RAG change from previous
HNASS02	Asset Management and Development	Review of staffing structure	(100)	0	(100)	0	On Track	This will be achieved as posts taken out where unlikely to recruit this financial year.	0	⇔
HNASS05	H&N Assets and Building Safety	Reduction in interest costs	(775)	(775)	(775)	0	Complete		0	⇔
HNPTY01	Property Services	Overhead Efficiency	(190)	0	(190)	0	On Track		0	⇔
TOTAL HRA			**(3,785)**	**(1,952)**	**(3,442)**	**343**			**0**	

Monthly Savings Monitoring – Public Health and Corporate Resources

Quarter 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	Change in Variance from previous £000	RAG change from previous
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.	0	⇔
CR2503	Culture & Visitor Economy	Annual Increase in Bereavement Services fees and charges	(60)	(60)	(60)	0	Complete	New charges introduced, but achievement will depend on maintaining sales	0	⇔
CR2504	Strategy & Innovation	Reductions in spend on IT contracts	(100)	(75)	(100)	0	On Track	Microsoft 365 upgrade has increased costs but offset by vacancy savings	0	⇔
CR2505	Strategy & Innovation	Vacancy Management – Strategy & Innovation	(234)	(234)	(234)	0	Complete		0	⇔
CR2507	Governance & Commissioning	Review of Governance Service & Structure	(75)	(75)	(75)	0	Complete		0	⇔
CR2508	Public Health & People	Review of People Service	(200)	(200)	(200)	0	Complete		0	⇔
AH2502	Public Health & People	Other minor savings variations of <£50k	(20)	(20)	(20)	0	Complete	Adjustment done as part of move	0	⇔
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	0	⇔
CB2501	Strategy & Innovation	Conservative Amendment Savings - Reductions in Communications Activity	(19)	(14)	(19)	0	On Track		0	⇔
TOTAL CORPORATE NEW SAVINGS			**(1,515)**	**(1,485)**	**(1,515)**	**0**			**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	Change in Variance from previous £000	RAG change from previous
24AH18	Public Health & People	Bring all customer contact centre activity together across the Council	(175)	(175)	(175)	0	Complete	Adjustments done as part of move	0	⇔
24AH19	Culture & Visitor Economy	Review of Registration Service Delivery Model and fees and charges	(295)	(221)	(295)	0	On Track	Review of income undertaken and looks ok	0	⇔
24CS6	Finance	Vacancy Management in Welfare & Exchequer service	(101)	(101)	(101)	0	Complete		0	⇧
24CS7	Finance	Financial Management – Increased Vacancy Factor	(50)	(38)	(50)	0	On Track		0	⇔
24CS8	Public Health & People	Review of people Services Operating Model	(15)	(15)	(15)	0	Complete		0	⇔
24EC18	Culture & Visitor Economy	Increase to Bereavement Fees and Charges	(65)	(65)	(65)	0	Complete	New charges introduced, but achievement will depend on maintaining sales	0	⇔
24EC20	Culture & Visitor Economy	Caretaking & Cleaning - Increased charges to schools	(200)	(200)	(200)	0	Complete	New charges introduced, but achievement will depend on maintaining sales	0	⇔
24EC27	Culture & Visitor Economy	Increase Commercial income	(20)	(20)	(20)	0	Complete	New charges introduced, but achievement will depend on maintaining sales	0	⇔
24CS13	Strategy & Innovation	Efficiencies relating to Information Technology	(445)	(165)	(149)	296	Slipped	Postage costs +£296k, so saving currently part mitigated by vacancy management	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	Change in Variance from previous £000	RAG change from previous
NEWCS3/ 4	Strategy & Innovation	Vacancy Management	(100)	(100)	(100)	0	On Track		0	⇔
TOTAL CORPORATE PRIOR YEAR APPROVED			**(1,466)**	**(1,100)**	**(1,170)**	**296**			**0**	
TOTAL CORPORATE 25/26 SAVINGS			**(2,981)**	**(2,585)**	**(2,685)**	**296**			**0**	

Monthly Savings Monitoring – Central Budgets

Quarter 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	Change in Variance from previous £000	RAG change from previous
CB2501	Treasury Management	Treasury Management Savings - from review of Capital Plan	(2,000)	(2,000)	(2,000)	0	Complete		0	⇧
TOTAL CENTRAL NEW SAVINGS			**(2,000)**	**(2,000)**	**(2,000)**	**0**			**0**	

Monthly Savings Monitoring – Savings Slipped from Previous Years

Quarter 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	Change in Variance from previous £000
24AH28	Adults	Increasing the collection of social care income	(2,627)	(745)	(745)	1,882	Only partial achievement on the income/debt management savings target of £2,627k	50
EN3	Place	School Crossing Patrols School Income	(92)	0	0	92	Unlikely to be achieved in current financial year	0
24GR8	Place	Potential rent increase for temporary accommodation	(200)	0	0	200		0
24GR14	Place	Efficiencies / Directorate Wide	(335)	(168)	(168)	167		0
24EC5 (part)	Place	Bowling Greens	(86)	0	0	86		0
TOTAL SLIPPED SAVINGS FROM PREVIOUS YEARS			**(3,340)**	**(913)**	**(913)**	**2,427**		**50**

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Breakdown of Capital Budget Changes (2025.26) Appendix 3

	£'000	£'000	£'000
COUNCIL BUDGET REPORT			**239,372**
Increase in Grants/Contributions/Other			
Place			
Highways - UKSPF Grant	(489)		
Change in Grants/Contributions/RCCO/Other		**(489)**	
Re-profiling / Virements between Years			
General Fund:			
Children and Families			
Childcare Expansion	(150)		
Capital Maintenance	(1,120)		
Devolved Formula Capital (DFC)	(334)		
Adults and Health			
Carefirst	(100)		
Place			
West Yorkshire plus Transport Schemes	(594)		
Transforming Cities Fund	(7,178)		
Integrated Transport & Active Travel, Mobility Walking Cycling	(429)		
Flood Management & Land Drainage	(139)		
Aspirational Regeneration of Major Town	(5)		
Huddersfield Town Centre Action Plan	(993)		
Dewsbury Town Centre Action Plan	(600)		
Regeneration Of Our Local Centres	(245)		
Strategic Acquisition Fund	82		
Highways	(316)		
Play Strategy	(291)		
Corporate Strategy & Public Health			
Cliffe House	(211)		
School Catering	(36)		
Bereavement	(33)		
Investment & Modernisation Fund	(500)		
General Fund Re-profile	**(11,610)**		

Breakdown of Capital Budget Changes (2025.26) Appendix 3

	£'000	£'000	£'000
Re-profiling / Virements between Years			
Housing Revenue Account:			
Housing Growth : Buybacks/LAHF	(45)		
LAHF1/3 - Temporary Housing	(433)		
Ashbrow	(10)		
Berry Brow Remodelling	(353)		
Buxton House Remodelling	38		
Harold Wilson Court	151		
New Housing IT System	(195)		
New Property / Assets System	166		
Council House Building	(25)		
Housing Capital Plan : Baseline	(759)		
Environmental Improvements	(152)		
Building Safety	1,317		
Six Storey Blocks	50		
Low Rise Blocks	(1,496)		
Retirement Living Schemes	(200)		
Fuel Poverty	(650)		
Housing Revenue Account Re-profile	**(2,596)**		
Total Re-profiling		**(14,206)**	
Total Change in Budget			**(14,695)**
Q3 CAPITAL BUDGET			**224,677**

	£'000	£'000
Change in Budget - Funding Breakdown:		
General Fund		
Borrowing	(1,500)	
Self-funded	(560)	
Grants & Contributions	(9,724)	
S106 / S278	(315)	(12,099)
Housing Revenue Account		
Grants	(214)	
Receipts	(55)	
Reserves/Revenue Contributions	(2,327)	(2,596)
Change in Budget		**(14,695)**

Report title: Q3 2025/26 Council Plan and Performance Update Report

Meeting	Cabinet
Date	24th March 2026
Cabinet Member (if applicable)	Councillor Carole Pattison
Key Decision **Eligible for Call In**	No No
Purpose of Report The Q3 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 – 13/03/2026 Kevin Mulvaney, Service Director – Finance - 10/03/2026 Sam Lawton, Service Director – Legal, Governance and Commissioning (Monitoring Officer) – 12/03/2026

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 Q3 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.

Key highlights and issues

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

Key Highlights:

- **The percentage of mothers smoking during pregnancy has reduced**. 4.1% of mothers reported smoking at the time of delivery during Q2 2025/26 compared to 4.6% during Q1 2025/26 and 4.9% during Q2 2024/25. The rate in Kirklees in Q2 2025/26 (4.1%) is lower than the national rate (4.3%), reflecting the sustained impact of targeted smoking cessation interventions and contributing to healthier pregnancies and improved outcomes for families (further details can be seen on page 26 of the main report).
- **Sickness days per FTE is 0.32 days lower than it was 12 months ago.** Although sickness absence remains high at 13.62 days per FTE for the 12 months up to the end of Q3 2025/26, this is the lowest rate since Q3 2023/24 (13.56). This improvement has been made through person centred intervention and support for managers with further improvements to be made going forward (further details can be seen on page 24 of the main report).
- **The percentage of Freedom of Information (FOI) requests completed in time has increased during the last 12 months.** 87% of FOI requests were completed within 20 working days during Q3 2025/26, an increase of 10 percentage points compared with Q3 2024/25 (77%). Compliance has improved on the same period last year, when several requests were received relating to a specific planned local development. Requests received had also been higher in Q2 2025/26 as a result of a specific bus lane development. (Further details can be seen on page 20 of the main report).

Key Issues:

- **Collection rates for Council Tax and Business Rates are lower than they were 12 months ago.** The Council Tax collection rate is 0.42 percentage points lower compared to Q3 2024/25, and the Business Rates collection rate is 0.65 percentage points lower compared to Q3 2024/25. Collection rates for Council Tax and Business Rates in Kirklees are lower than statistical neighbour benchmarks. Other local authorities are under similar pressures, we are sharing learning and experiences with them and are considering alternative recovery methods for the new financial year (further details can be seen on page 23 of the main report).

Increase in demand:

- **The percentage of Education, Health and Care Plans (EHCPs) finalised within 20 weeks has significantly reduced over the last 3 months**. 31.3% of EHCPs were finalised within 20 weeks during Q3 2025/26 compared to 72.7% in Q2 2025/26 and 62.6% in Q1 2025/26. Although our performance during the 2025 calendar year (50.8%) is higher than the latest national rate (46.4%) and statistical neighbour rate (42%). A low performing final month of the year impacted this performance due to a high volume of requests being processed across the system. The reduction in the figures in the past two quarters is impacted by the number of open EHCP assessments with 354 at the end of December 2025, a 26% increase compared to the end of September 2025 (further details can be seen on page 16 of the main report).
- **The number of children accessing home to school transport continues to increase.** At the end of Q3 2025/26 there were 1,596 children accessing home to school transport, an increase of 45 (2.9%) children compared to 3 months ago and an increase of 36 (2.3%) children compared to 12 months ago. This reflects a national trend. The growth in Education Health and Care Plans (EHCPs) is associated with an increase in pupils eligible for home-to-school transport services which we must provide. Our main priority is to provide services that eligible pupils need, contain costs and boost efficiency, so that we can accommodate rising pupil numbers within existing budget limits (further details can be seen on page 41 of the main report).

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

Service Director for Strategy and Innovation, Andy Simcox
Telephone – 01484 221000
Email – Andy.Simcox@kirklees.gov.uk

9 Background Papers and History of Decisions

Not applicable.

10 Appendices

Not applicable

11 Service Director responsible

Andy Simcox, Service Director for Strategy and Innovation

Kirklees Council

Council Plan and Performance Update Report

Quarter 3 2025/26

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Council Plan Priorities Update – Quarter 3 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 December 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

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

The Customer & Access Programme has continued to drive forward improvements to customer experience and the way in which we provide information to customers. Over the last quarter, we have completed an extensive customer mapping process for our Highways Services, so we are better able to understand the customer journey, and we have developed a number of recommendations to take forward so we are able to make changes to the customer journey, including enhancing online self-service and improving the availability of accurate online information to reduce unnecessary contacts. During the last quarter, we also launched an improved missed bin reporting online system, which includes live updates on missed bins.

Getting the basics right to be an efficient and effective organisation

In November 2025, we published the Local Government Association's (LGA) progress review report following a visit in September 2025. The LGA's report acknowledges the progress the council has made on delivering the recommendations made by the LGA in November 2024, and the action plan subsequently agreed. The LGA report highlights that "working relationships between the Leader and Cabinet, and the Chief Executive and Senior Management team have matured further and collectively they have brought stability, clarity, grip and more energy to the council". The peer team also "noted greater confidence, tempered with realism, from the collective senior political and managerial team about how they will address current and future challenges". A more detailed council report on progress made against the action plan was considered by Cabinet on the 2 December. The report outlines that as of 2 December, 14 of the 42 actions were complete, 27 on track and only one slipped. Overview and Scrutiny Management Committee also considered the progress update at their meeting on the 5 December.

Getting the basics right to ensure we have financially sustainable services

At the end of Quarter 3, the Council's overspend was reported as £4.077m (c£1m better than Q2). Pressures remain in social care but one-off energy savings and reduced capital financing costs have in the main helped reduce the projected overspend.

On the 2 December, Cabinet considered and published a draft budget report for the coming financial years. This continues our ongoing approach to improving engagement and transparency around the budget development process. On the 3 December, we launched the public consultation on the proposals contained within the budget to help inform the development of the final budget. The final budget was agreed at Council on the 25 February 2026, and a new Council Plan produced. The top three themes relating to public feedback on the budget were roads, pathways, highways and infrastructure, town centre regeneration, and Council Tax. The Council Plan, and the budget go hand-in hand together, setting out the priorities, strategy and the resources needed to deliver those priorities. Made possible by the three-year Local Government Financial Settlement, they will both present an ambitious, longer-term set of goals and actions for improving outcomes for the people and places of Kirklees.

Priority 2 – Protecting the vulnerable and achieving inclusion

Inclusive care and support

In October, we published the latest update on support for children and young people with special educational needs and disabilities (SEND), called the Big Plan Part 3. Like other Big Plans, it was produced by the Kirklees Local Area SEND partnership and gives key information about our recent Local Area SEND inspection and how we are responding to it. Ofsted and the Care Quality Commission (CQC) conducted the inspection. It told us (report here) that we were inconsistent in how we deliver our SEND provision, while identifying a lot of good work happening across the SEND transformation programme.

Also in October, we launched a pilot service of eight in-house minibuses to transport children with SEND from their home to their place of education. Operating alongside existing transport providers, the initiative aims for more consistency and familiarity in school transport arrangements.

On adult social care, we have made progress in reshaping the local accommodation offer to better meet current and future social care needs. This includes swifter progress on extra care housing and expanded supported living arrangements and offers, with a particular focus on enabling people with learning disabilities, autism and complex needs to live more independently.

We have also continued to work closely with the Kirklees and Calderdale Care Association to support a diverse, resilient, and high-quality care market, strengthening collaboration on workforce, quality improvement, and lived-experience-led service design. Ongoing work to improve the experience of LGBTQ+ people using social care services is being embedded within commissioning expectations and provider practice and featured in the Council's CQC Assurance Improvement Plan. These actions are contributing to a more sustainable, person-centred accommodation system that supports independence and improved outcomes for local people.

An inclusive organisation

Building on the redesigned strategic workforce planning process introduced last quarter, we have begun drafting a plan for the future of the workforce planning function. Part of this plan focuses on better engagement with the wider organisation, reaching services that have yet to begin their workforce planning journey. Since the last quarter, succession planning and resource planning sessions are ongoing in areas such as Kirklees Direct & 24 Hours and Policy and Partnerships. These sessions further promote inclusion and allow underrepresented groups to express their interest in leadership positions of the future.

Work has continued on ‘Year 1’ of the Inclusion and Diversity Strategy action plan through development of cross-organisation anti-racism resources, as well as of new process for creating employee networks alongside refreshed high level support for the networks. We continue to enhance Integrated Impact Assessments (IIAs), for example creating a new case management dashboard. On workforce data, a guidance video on updating SAP is ready for circulation.

Preventing homelessness and rough sleeping

We have maintained a positive trend in relation to a reduction of homeless families in Bed & Breakfast (B&B) accommodation. By the end of Quarter 3, the number of families in B&B have reduced from 104 to 33, over the last twelve months. The total number of households in all forms of temporary accommodation is 374, a much-improved figure compared to the previous two years. The Council is well-advanced with plans to implement training, upskilling and communications to comply with the Renters' Rights Act, key provisions of which are due to come into force in May 2026. Rough sleeping remains a key priority, with additional focus in Quarter 3 including severe weather emergency accommodation provision during periods of excess cold weather, and work to enhance assessment and support pathways for prison leavers and hospital discharge cases at risk of sleeping rough.

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

Children and Families

We continue to work closely with partners and practitioners to co-design the Kirklees approach for implementing the Families First programme. Our established governance arrangements are guiding the design process, ensuring alignment with national priorities and local needs. Engagement with the Department for Education and communities of practice remains strong and we anticipate formal engagement with practitioners in the near future to shape delivery. We held an initial session with LA-maintained schools to explore future collaboration opportunities. A smaller working group has since been formed, meeting once so far, with further sessions planned to share early findings. System-wide engagement continues through the Education and Learning Partnership Board, reviewing educational outcomes, exclusions, and providing updates on UNESCO opportunities.

Clean, Safe and Healthy Places

Safer Kirklees and the Community Safety Partnership delivered a comprehensive Bonfire Plan, involving multi-agency planning, visual audits of bonfires, and targeted work with trading standards and businesses on fireworks sales. Education and guidance were provided to residents and young people, with Detached Youth Work focusing on areas with previous ASB concerns. Intelligence-led visits were supported by West Yorkshire Police and Fire Service, including home visits to young people previously involved in risky behaviour. The Partnership continues to monitor buildings of concern, working with Housing Solutions, Fire Service and Police to ensure safety and hold owners accountable. Weekly Tactical Coordination and additional meetings track progress. Legislative powers, including Closure Orders, have been used where necessary to address severe ASB, though efforts remain focused on prevention and tackling root causes.

Water safety risk assessments are now complete, with 99.76% conducted on-site and all rated low risk. Significant progress has been made on damp, mould, and condensation compliance following Awaab's Law (Oct 2025). Fire safety risk assessments were completed in November, with 63% of actions delivered. Remainder scheduled through a dedicated remediation programme. A facilitated stakeholder workshop in December initiated discussions on the physical activity partnership.

Thriving Communities

Place Standard feedback and action planning is underway in Meltham, Chickenley and Earlsheaton, with ongoing work in Honley and Marsden and preparations for Farnley Tyas. Fifteen organisations are fundraising through civic crowdfunding, with outcomes due in Q4. Ward councillors allocated £34,440 in grants, unlocking £52,561 in match funding and 7,324 volunteer hours, delivering £115,946 in social value and benefiting 56,474 individuals.

Libraries delivered a wide range of activities, including preparations for the National Year of Reading 2026, author visits, creative workshops, and themed events such as World Book Day. Seasonal highlights included festive storytelling and livestreamed Royal Institution lectures. Digital engagement and volunteer support remain strong. Third Sector Leaders exceeded contract priorities, supporting groups with financial management, safeguarding, and volunteering. Their work strengthened community networks and anchor organisations, surpassing expectations across all areas.

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

Investment & Place

Skills and Employment Support

Through our Skills Bootcamps, we have supported 69 employees in the textiles and advanced manufacturing sector, with AW Hainsworth showcasing the impact of this training in a video case study. In the Early Years sector, 32 residents (year to date) have progressed into employment across nurseries, schools, out of school clubs, and even an independent tutoring venture, which has also been featured in a case study.

In construction, we are maintaining strong collaboration with Kirklees College and have launched a new Routeway to Construction course, designed with a particular focus on supporting veterans. This programme includes employability skills, Net Zero awareness, and the CSCS qualification.

We are also developing relationships with new prospective suppliers who have strong links across utilities, construction, waste management, and logistics. This includes engagement with major employers such as Yorkshire Water, where we have provided detailed guidance on the Employment Kirklees process and positioned ourselves to support future business needs.

Many of our Adult Skills Funded programmes already include embedded employability support or sector specific skills development that benefit residents with long term health conditions. Examples include Barista training, Health & Social Care pathways, and a wide range of other vocational courses that build confidence, develop practical skills, and support progression into good work.

We continue to deliver a broad range of adult learning programmes across community venues, with ESOL remaining a high demand area. The New to English community programme has been particularly popular, though it will conclude on 31 March as UKSPF funding ends. To mitigate this, we have expanded MESOL activity through the Count Me In programme, ensuring continuity of support for learners.

The Adult Skills Fund continues to provide opportunities for conversational English and progression focused ESOL learning. Demand for ESOL consistently exceeds available provision, so we are carefully balancing ESOL delivery with the need to maintain a broad and diverse curriculum. ESOL is also expected to be an area of increased focus for WYCA in 2026–27, and we are preparing our provision accordingly.

Transport

Construction activity continues at Heckmondwike Bus Hub with the shell of the new building and bus stand nearing completion which will be followed by external cladding and internal finishes, anticipated end Spring/ Summer 2026.

In Spring 2026, we will start to improve public realm areas surrounding Huddersfield Bus Station as well as a new cycle hub and a new building canopy to enhance the existing gateway. A Full Business Case is being developed in conjunction with WYCA.

At Dewsbury Bus Station, demolition works have concluded and new steelwork for the new retail units and entrance mall has now been installed. Full renovation increasing accessibility, providing cycle parking and improving energy savings is expected to be complete summer 2027.

Housing Growth

We continue to focus our efforts on strategic acquisitions, negotiations, progress planning and development on our key housing sites at Dewsbury Riverside, and Bradley Park, ultimately delivering around 3,000 units for Riverside and 473 for the first phase at Bradley.

Council Performance Update – Quarter 3 2025/26

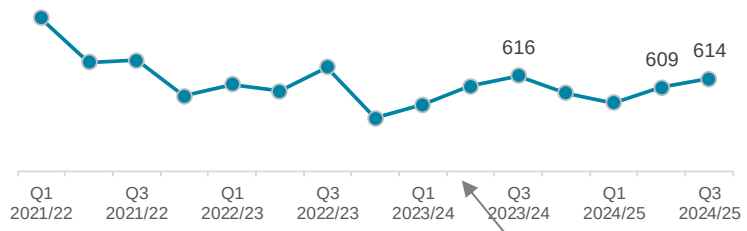
This section provides an update on progress against the Council's Key Measures. The Council's Key Measures provide insight into the performance of the council and demand on key council services. Below provides an example of how the information is presented and an explanation of what it means.

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.

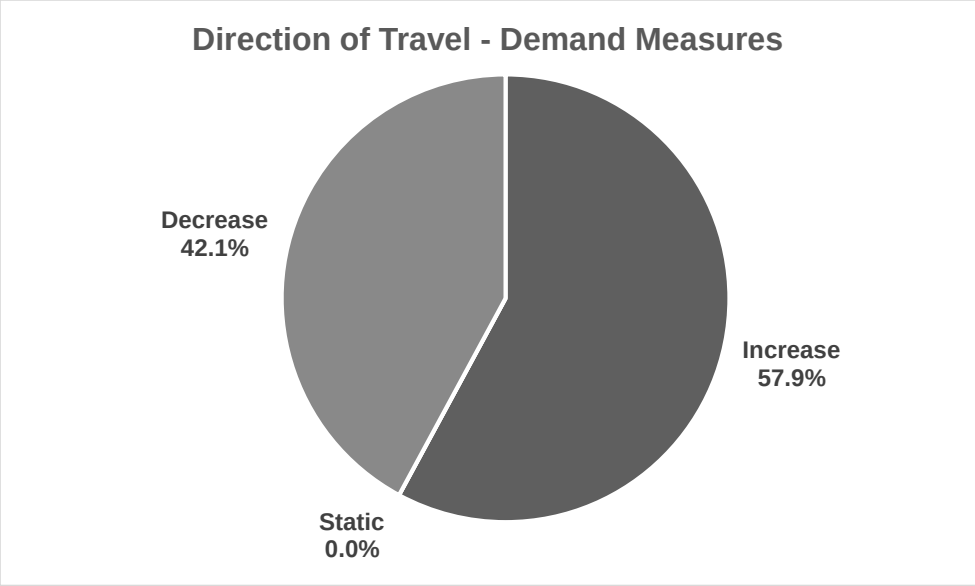
Latest value comparison:

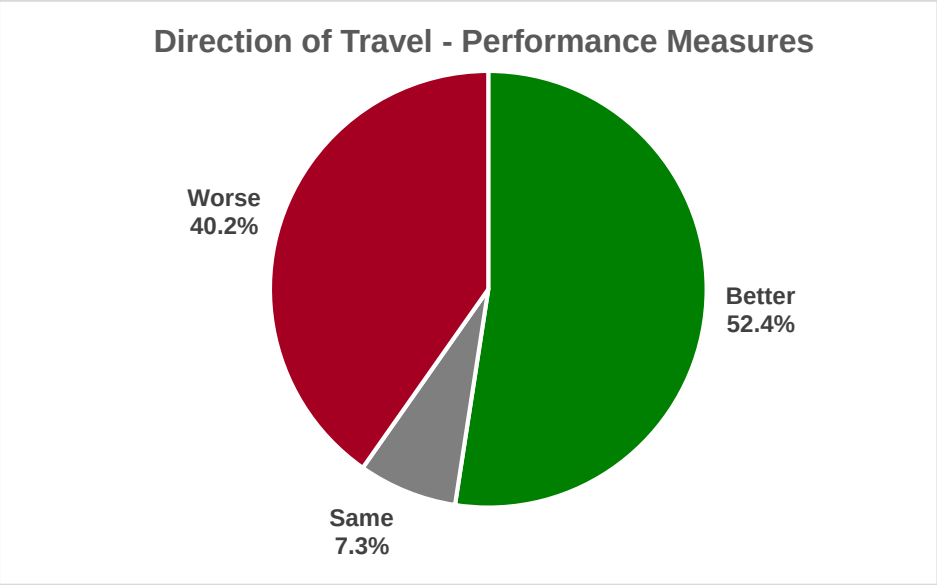
The latest value will be compared to 3-months ago (12-months for annual measures) and 12-months ago (24-months ago for annual measures), how the measures is performing and the difference.

- 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

At the end of Q3 2025/26, the number of adults aged 18–64 supported in community settings continues to reflect growing demand, increasing complexity, and a sustained commitment to helping people live independently. There has been an increase in the number of younger people with neurodiverse needs requesting support. Although this is not measured specifically on any national returns and there is no benchmarking data, we are working with colleagues to track this data to support both practice improvement and commissioning intentions and alternative solutions.

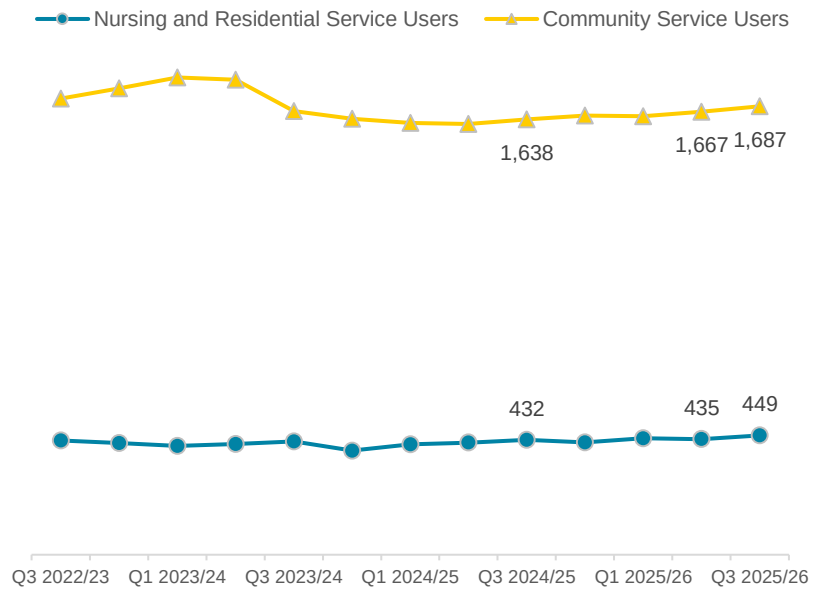
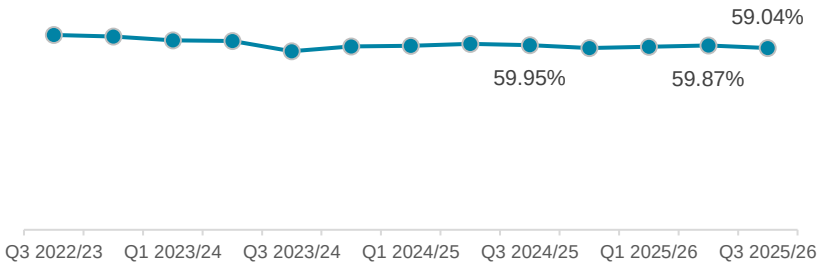
The number of adults in nursing or residential care has continued to rise, with a total of 1,497 people now in long-term placements. There has been an increase in both younger and older adults in long-term placements. In Q4 we will undertake a deep dive to understand the reasons for the increase in the 18-64 age group, with the rise in older people being driven by a significant number of self-funders whose financial resources have reduced, resulting in new admissions to council funded care. Our new Accommodation Team will support this area of work, and an improvement plan focused on preventative support for self-funders forms part of the 2026/27 Change Programme. We have also seen more people moving into long term residential and nursing care following a hospital discharge (Pathway 3). Work with health partners to improve hospital flow is ongoing, and a new “left shift” pathway will be implemented in Q4, with impact on Pathway 3 referrals monitored through an implementation plan. Winter pressures continue to add challenges to hospital discharge. Despite this rise in older adults in long term placements, Kirklees continues to perform better than the national average.

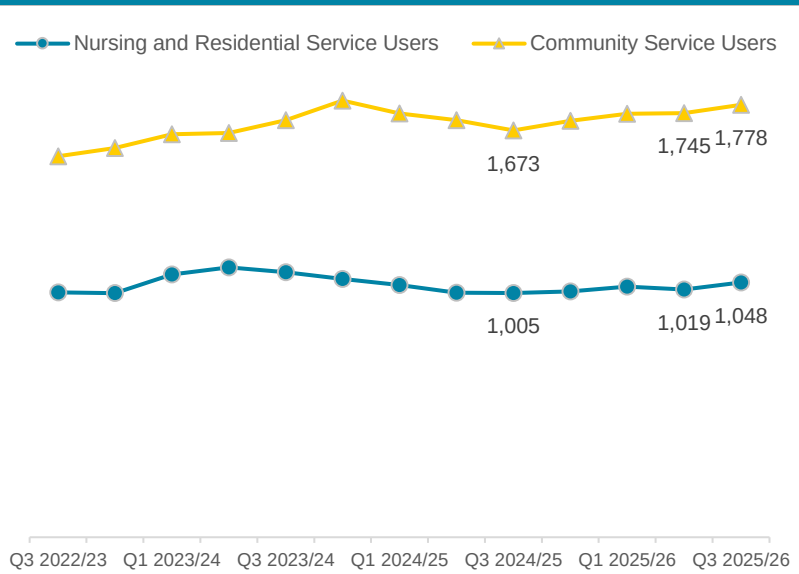
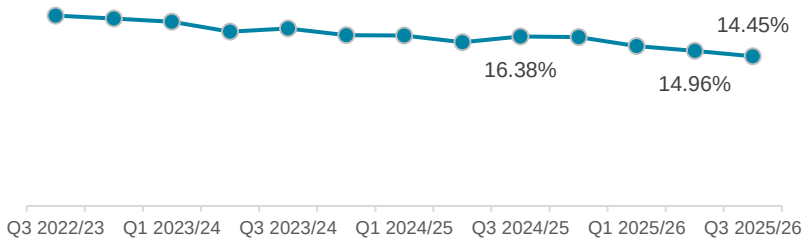
Direct Payments for Unpaid Carers have been removed from the measures to be consistent with national data, which has affected the overall Direct Payments data. However, Kirklees continues to perform strongly against national benchmarks for both younger and older adults receiving a Direct Payment, supporting our commitment to personalisation, choice and control (see chart in page 11 for younger adults and page 12 for older adults).

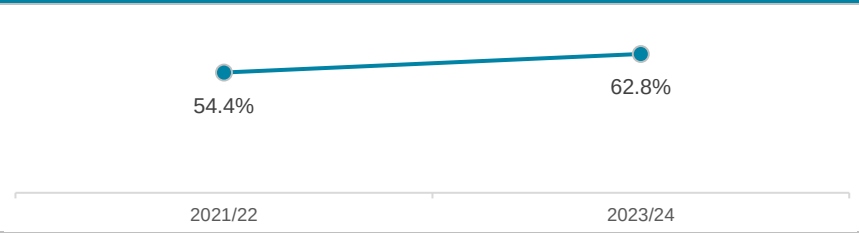
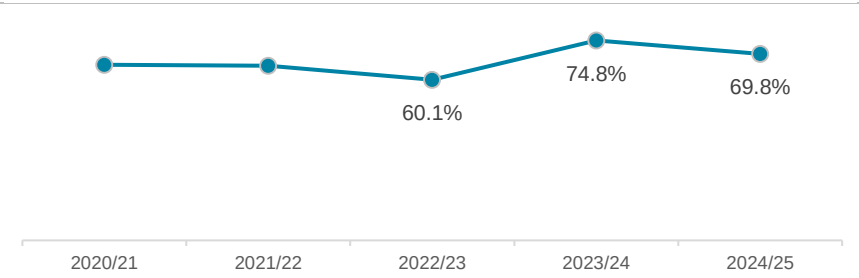
Overall, Q3 data shows that Kirklees is managing rising demand while maintaining a strong focus on prevention, personalisation and independence. Performance across all indicators for people aged 65+ continues to exceed national benchmarks, supported by close working relationships with health partners and ongoing investment in community capacity and reablement.

Despite this positive trajectory, a range of operational and system pressures continue to influence demand patterns. These include increased hospital discharges with higher levels of need, workforce challenges across the independent care sector, and ongoing market pressures. As a result, we have seen minor fluctuations in the number of people receiving both short term and long term support as system capacity flexes. The continued rise in community-based support is encouraging but also highlights pressure on preventative services and domiciliary care capacity. Our priorities for next quarter include strengthening market resilience through the homecare retender, maximising reablement and intermediate care capacity, and working with health partners to better manage demand at the front door through the Integrated Transfer of Care (ITOC) programme.

Key Measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Community Service Users aged 18-64 (at period end)	Demand	1,687 (End of Q3 2025/26)		**Increase** by 20 users compared with the end of Q2 2025/26 **Increase** by 49 users compared with the end of Q3 2024/25	Kirklees – 624 National – 684.4 Number of Community Service users aged 18-64 per 18-64 100,000 population (Q2 2025/26)
Number of Nursing and Residential Service Users aged 18-64 (as at period end)	Demand	449 (End of Q3 2025/26)		**Increase** by 11 users compared with the end of Q2 2025/26 **Increase** by 40 users compared with the end of Q3 2024/25	Kirklees – 165 National – 105.8 Number of Nursing and Residential Service users aged 18-64 per 100,000 18-64 population (Q2 2025/26)
% of service users receiving a Direct Payment aged 18-64 (at period end)	Performance	59.04% (996 / 1,687) (End of Q3 2025/26)		**Worse** by 0.83 percentage points compared with the end of Q2 2025/26 **Worse** by 0.91 percentage points compared with the end of Q3 2024/25	Kirklees – 58.8 National – 35.5 % of Direct Payment service users aged 18-64 (2024/25)

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Community Service Users aged 65+ (at period end)	Demand	1,778 (End of Q3 2025/26)		**Increase** by 33 users compared with the end of Q2 2025/26 **Increase** by 105 users compared with the end of Q3 2024/25	Kirklees – 2,069 National – 2,251 Number of Community Service users aged 65+ per 100,000 65+ population (Q2 2025/26)
Number of Nursing and Residential Service Users aged 65+ (as at period end)	Demand	1,048 (End of Q3 2025/26)		**Increase** by 29 users compared with the end of Q2 2025/26 **Increase** by 43 users compared with the end of Q3 2024/25	Kirklees – 1,247 National – 1,417 Number of Nursing and Residential Service users aged 65+ per 100,000 65+ population (Q2 2025/26)
% of service users receiving a Direct Payment aged 65+ (at period end)	Performance	14.45% (257 / 1,778) (End of Q3 2025/26)		**Worse** by 0.51 percentage points compared with the end of Q2 2025/26 **Worse** by 1.93 percentage points compared with the end of Q3 2024/25	Kirklees – 16.9 National – 13.6 % of Direct Payment service users aged 65+ (2024/25)

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 2022/23 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 5.0 percentage points compared with 2023/24 **Better** by 9.7 percentage points compared with 2022/23	Kirklees – 69.8% Yorkshire and the Humber – 67.8% (2024/25)

*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

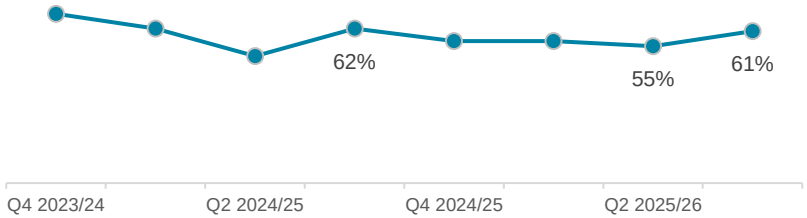
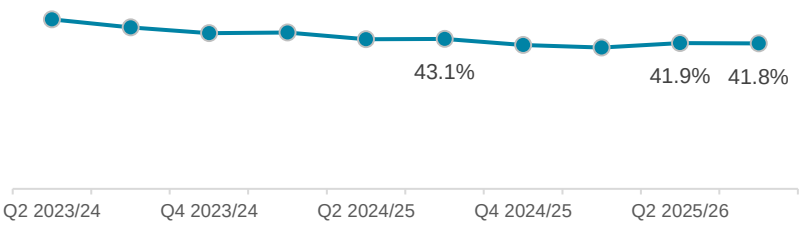
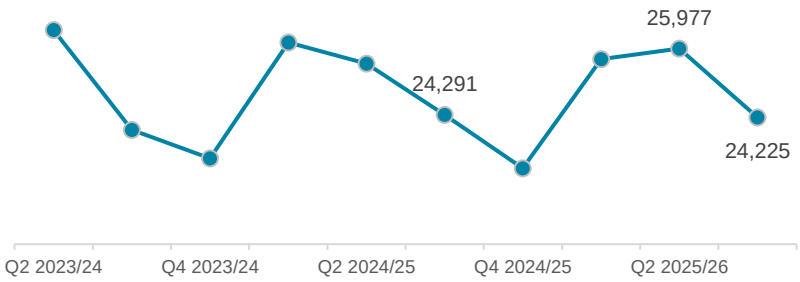
Repeat domestic abuse incidents reported to the police have slightly decreased since last quarter by 0.1% and from Q3 2024/25 by 1.3%. Overall, there has been a reduction in the number of repeat incidents and overall incidents reported to the Police. Partners are aware that there is underreporting to the Police across the District. A recent Community Champions Healthwatch Report in 2025 shows that 60% of people avoid reporting due to fear, stigma, or taboo.

Anti-social behaviour (ASB) prevalence is seasonal, explaining the reduction from Q2 to Q3. Overall, the number of incidents remains stable year-on-year. There have been year-on-year reductions in nuisance ASB for motorcycles and quad bikes, alongside deliberate fires and criminal damage. Safer Kirklees and the Community Safety Partnership implemented a comprehensive Bonfire Plan supported by coordinated multi-agency planning and Detached Youth Work has focused on areas with previous anti-social behaviour issues to reduce risk and promote safer celebrations.

The number of smoking referrals have been lower in comparison to previous quarters; this was to be expected given people are often reluctant to start on a quit journey in the lead up to the festive period. The service has managed to achieve a 6% increase in verification rate on the Q2 figure, sitting at 61%. This continues to be well above the national average of 36% and regional average of 16%, highlights that this is part of the range of indicators that demonstrate that the service offers high quality support and achieves excellent outcomes. The 6% increase in verification rate could be in part due to recent addition of a home CO testing kit for clients who are unable to attend drop ins for verification due to work commitments or ill health. The service aims to further increase the verification rate in the coming quarters.

The next quarter will see the introduction of a new way of supporting people who struggle with the conventional process of quitting called “Cut Down to Quit”. The service will also introduce a ‘Patient Group Directive’ process, that will allow staff to support people in accessing stop smoking medications (via pharmacies).

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Smoking Quit Verification Rate	Performance	61% (Q3 2025/26)		**Better** by 6 percentage points compared with Q2 2025/26 **Worse** by 1 percentage points compared with Q3 2024/25	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	41.8% (1,021 / 2,443) (Q3 2025/26)		**Better** by 0.1 percentage points compared with Q2 2025/26 **Better** by 1.3 percentage points compared with Q3 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	24,225 (Q3 2025/26)		**Decrease** by 1,752 incidents compared with Q2 2025/26 **Decrease** by 66 incidents compared with Q3 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

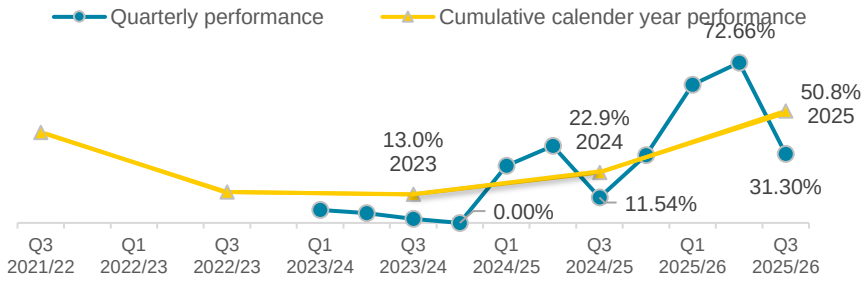
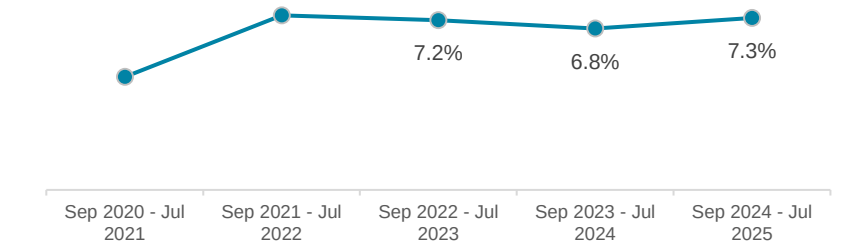
Learning & Early Support Key Measures

50.8% of Education, Health and Care Plans (EHCPs) were finalised within 20 weeks during calendar year 2025, a significant improvement compared to 22.9% in 2024. Our performance in 2025 is higher than the 2024 national rate (46.4%) and statistical neighbour rate for 2024 (42%). Our high performance was achieved despite a low performing final month of the year, impacted by a high volume of requests currently being processed across the system. The number of open EHCP assessments is 354 at the end of December 2025, a 26% increase compared to the end of September 2025.

The current position is not where we want to be. However, we understand the reasons behind this. We are actively monitoring the timescales for assessments and whilst we are outside 20 weeks for some, there is a very small number that are over 30 weeks. We continue to work with the partnership to support improved timeliness of advice and information to support the Local Authority's decision making. Following the summer 2025 slight increase in the number of requests for assessments, there have been challenges in receiving the necessary professional advice to support these assessments within the timescales to ensure that plans can be issued within the compliance period of 20 weeks. We are actively recruiting for Educational Psychologists and continue to support improved timeliness of health advice to support statutory assessments being completed within expected timeframes. In this quarter, there has been focus on change of phase Annual Reviews (where children are moving between primary and secondary schools) and ensuring that these are carried out at a time when children often need the most support. The professional's portal on our IT system was made available, allowing direct input by some of the professionals involved in the assessment process and the new ways of working are taking some time to embed.

As it currently stands, 20-week compliance will continue to be a challenge in quarter 4, however, we are working with partners to continue to look at solutions to improve this trajectory. Annual reviews will continue to be a focus, in particular for change of phase to inform sufficiency planning. As there is a government White Paper to be published by the government, we will begin to consider the implications for the partnership.

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	31.3% (36 / 115) (Q3 2025/26)		**Worse** by 41.4 percentage points compared with Q2 2025/26 **Better** by 19.8 percentage points compared with Q3 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	7.29% (4,302 / 59,012) (Sep 2024 – Jul 2025)		**Worse** by 0.5 percentage points compared with Sep 2023 – Jul 2024 **Worse** by 0.1 percentage points compared with Sep 2022 – Jul 2023	Kirklees - 7.1% National - 7.15% Total absence % (Q1 2024/25)

*Annually collected measure, updated with the most up to date academic data.

Child Protection & Family Support Key Measures

We have seen the numbers of children in our care rising and a decrease in placement stability.

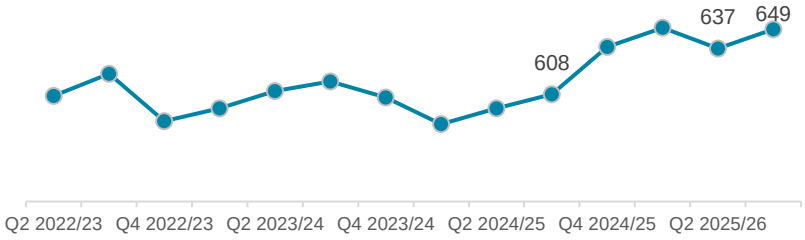
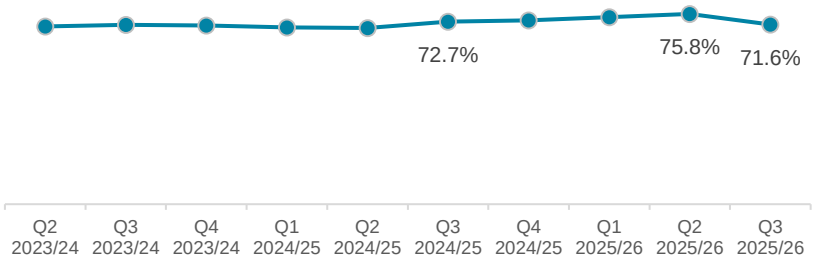
We have continued to experience a slight rise in the numbers of children in our care which is largely related to a high number of children in a sibling group which has impacted on the numbers. However, it is important to recognise that this decision making does provide children with the safety and stability that they need and our numbers remain much lower than statistical neighbours. When children do require our care, we provide them with loving and caring homes that allow them to thrive as we strive to achieve timely permanence arrangements for them. Wherever possible we support our children to live with their families, and this is reflected in our high use of special guardianship orders which have further increased. 65% of our children in care live in a fostering home.

To manage the increase in our numbers, we are developing an edge of care service. We have also invested in the purchase of a small children's home with a focus on reunification, in our ambition to ensure children, where it is safe to do so, can be supported to live at home.

Our teenage looked after children experience the greatest instability either through planned moves as they progress to semi-independence or through challenges ensuring we have carers or care settings that can meet their needs. We are continuing deep-dive analysis into causes of instability and applying findings directly into service improvements.

We continue to prioritise the importance of providing interventions that support placement stability through ongoing creative practice. These include further embedding improved long-term matching practices for children requiring permanency, expanding in house care provision and fostering offers to reduce reliance on external homes, progressing options for securing additional local housing stock, developing new in-house homes and strengthening partnerships with local providers.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Looked After Children	Demand	649 (Q3 2025/26)		**Increase** by 12 children compared with Q2 2025/26 **Increase** by 41 children compared with Q3 2024/25	Kirklees – 64 Statistical Neighbours – 91.6 Children looked after rate per 10,000 children aged under 18 (2024/25)
Percentage of Looked After Children who have been in the same placement for 2 or more years	Performance	71.6% (144 / 201) (Q3 2025/26)		**Worse** by 4.2 percentage points compared with Q2 2025/26 **Worse** by 1.1 percentage points compared with Q3 2024/25	Kirklees - 74% Statistical Neighbours – 71.4% % living in same placement at least 2 years (Q4 2024/25)

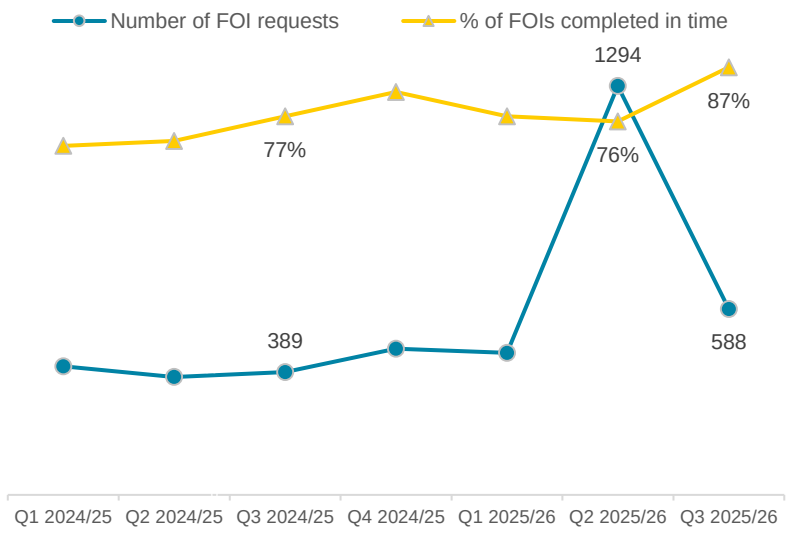
Public Health and Corporate Resources

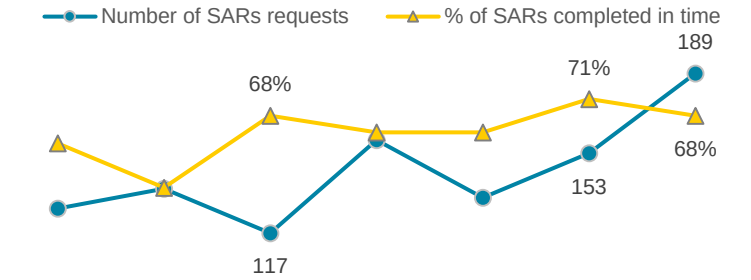
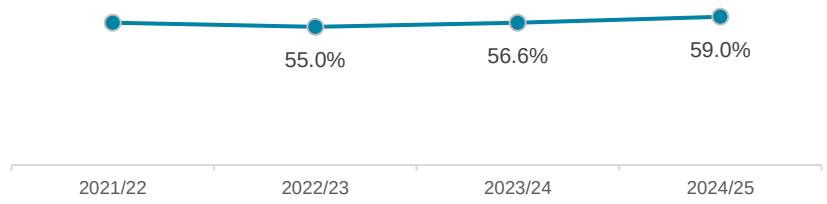
Governance & Commissioning Key Measures

Q3 2025/26 saw a decrease in the number Freedom of Information (FOI) requests in comparison with Q2 2025/26 but an increase compared with the same period last year. The end of Q2 2025/26 and beginning of Q3 2025/26 saw an increase in the number of FOI's submitted. This was the result of public upset in relation to a local development. Over 600 FOIs were submitted on this subject alone across September and October, however these submissions were made up of around 40 separate requests that had been repeated. Compliance has improved on last quarter and the same period last year; this is likely due to several of the same requests being submitted around the local development. FOI compliance remains down compared to our West Yorkshire counterparts and the minimum Information Commissioner's Office (ICO) requirements. Initial trend analysis has been conducted, and it is expected that Q4 figures will decline against Q3 but may still be inflated on the same period last year. Work is ongoing to liaise with services to review specific trends and review frequently requested information to consider routine publication. In Q4 we aim to, as a minimum, maintain compliance at current levels. It is expected that a lower number of FOI requests will be submitted in comparison with the last two quarters allowing additional time to continue work on the trend analysis. Conversations will also begin with Data & Insight colleagues to develop an FOI dashboard which will assist with monitoring and reporting compliance moving forward.

Subject Access Requests (SAR's) have increased in Q3 2025/26 in comparison to Q2 2025/26 and the same period last year. Compliance has dropped due to increase in demand. There has been an average annual increase in requests of 25% since 2022 and resource within IG and services has remained static. The backlog of requests continues to increase and the ICO require reports every other month as they monitor compliance. Increasing numbers of SARs are being submitted to the authority each quarter and as a result, the backlog of requests is increasing. Work is ongoing to source a technological solution to support with SAR management including the bundling of documents, deduplication of records and allowing of mass redactions across an entire data set. A business case for the technical solution to support SARs will be presented at the Directorate Technology Board. If approved, procurement for the system will commence.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percent of Freedom of Information requests completed in time	Performance	87% (892 / 1,021) (Q3 2025/26)		**Better** by 11 percentage points compared with Q2 2025/26 **Better** by 10 percentage points compared with Q3 2024/25	Kirklees – 75.3% Bradford - 92% Calderdale - 94% Leeds - 89.2% Wakefield - 99% (2024/25)
Number of Freedom of Information requests received	Demand	588 (Q3 2025/26)		**Decrease** by 706 requests compared with Q2 2025/26 **Increase** by 199 requests compared with Q3 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)

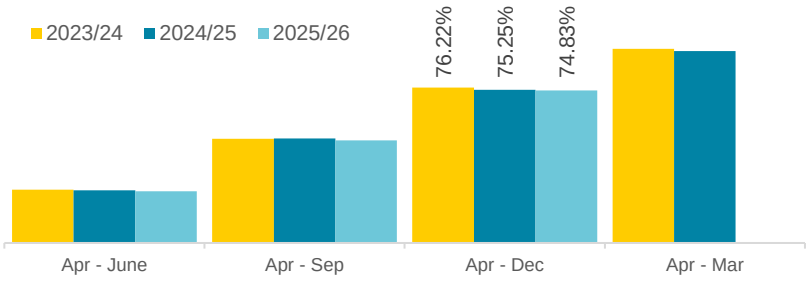
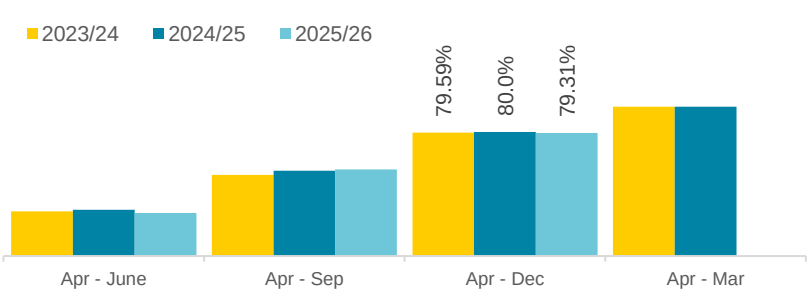
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percent of Subject Access Requests completed in time	Performance	68% (98 / 144) (Q3 2025/26)		**Worse** by 3 percentage points compared with Q2 2025/26 **Same** by 0 percentage points compared with Q3 2024/25	Kirklees – 63% Bradford - 97% Calderdale - 97% Leeds – 86.2% Wakefield - 98% (2024/25)
Number of Subject Access Requests received	Demand	189 (Q3 2025/26)		**Increase** by 36 requests compared with Q2 2025/26 **Increase** by 72 requests compared with Q3 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

*Annually collected measure, no updated data available for Q3 2025/26

Finance Key Measures

Collection rates for Council Tax and Business Rates are down on previous years at this stage. It is clear that many residents continue to be feeling pressures. We are using our teams to direct support and advice whilst also robustly recovering from those that have propensity to pay. New products have been rolled out to offer residents more online choice when making arrangements to make payment. Benchmarking of practice and procedure with other Local Authorities has been undertaken. Other Local Authorities are under similar pressures. We are sharing learning and experiences with others and are considering alternative recovery methods for the new financial year.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Council Tax collection rate*	Performance	74.83% (£228.7M / £305.6M) (Apr 2025 – Dec 2025)		**Worse** by 0.42 percentage points compared with Apr 2024 – Dec 2024 **Worse** by 1.39 percentage points compared with Apr 2023 – Dec 2023	Kirklees - 94.1% Statistical Neighbours - 95.1% Council Tax in-year collection rate (April 2024 to March 2025)
Business Rates collection rate*	Performance	79.31% (£87.9M / £110.8M) (Apr 2025 – Dec 2025)		**Worse** by 0.65 percentage points compared with Apr 2024 – Dec 2024 **Worse** by 0.28 percentage points compared with Apr 2023 – Dec 2023	Kirklees - 96.17% Statistical Neighbours - 96.71% Business rates in-year collection rate (April 2024 to March 2025)

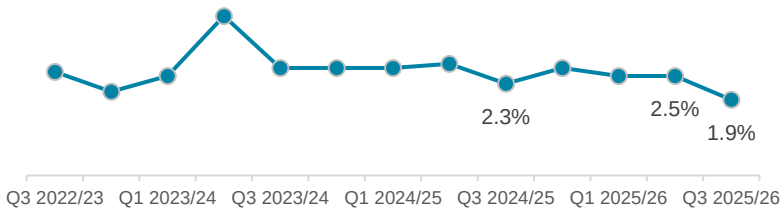
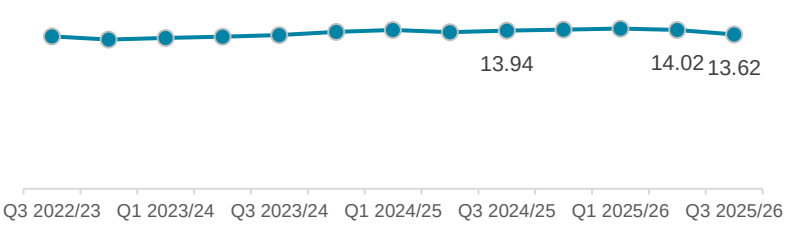
*Cumulative measures, comparisons are with previous 12 months and previous 24 months.

People Services Key Measures

Sickness absence has improved through person centred intervention and support for managers. Gaps in manager knowledge have been identified and during the next quarter further learning packages will be launched to improve manager confidence. Policy updates will focus on areas that can make a real difference to sickness absence, these are keeping in touch during absence and reminding of the importance of return-to-work conversations. Employee voice groups have confirmed colleagues are aware of the wide range of wellbeing support available and appreciate that these services are clear and easy to access. During the next quarter, learning sessions on good management practices will be delivered to managers and we will maintain focus and share successes.

We continue to see a slight reduction in turnover between quarters and against 2024/25. The data has not identified any concerns in both natural turnover and seasonal peaks. Outcomes from our annual employee's survey 'Our Conversation' have been discussed at Executive Leadership Team (ELT) and at a directorate level with each directorate now developing their own action plans in response. Employee Voice groups have also taken place where Our Conversation themes have been explored in more depth. Learning from the Retention Reset programme is being taken forward, this includes induction and exploring employee recognition approaches. Council wide induction is being refreshed with a focus on employee engagement and updating materials to reflect current priorities and approaches included in the Council's new initiative to strengthen our organisation's culture 'Our Council'. Workforce Planning priorities are also being refreshed to support areas that are impacted negatively by turnover. Looking forward the refreshed induction will be launched with a welcome event to be piloted and refreshed entry and exit surveys are anticipated to launch. Directorate action plans following Our Conversation are expected to be developed to ensure action is taken as a result of this employee engagement. The refreshed workforce planning priorities will be considered by People Strategy Programme Board.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Staff turnover (percentage of staff leaving the Council, excluding internal movement)	Performance	1.9% (143 / 7,727) (Q3 2025/26)		**Better** by 0.6 percentage points compared with Q2 2025/26 **Better** by 0.4 percentage points compared with Q3 2024/25	Kirklees – 10.3% National* - 12.21% Turnover rate (2024/25)
Average sickness days per full time equivalent (FTE) over the last 12 months	Performance	13.62 (Q3 2025/26)		**Better** by 0.4 days per FTE compared with Q2 2025/26 **Better** by 0.32 days per FTE compared with Q3 2024/25	Kirklees – 14.03 National* - 10 2024/25

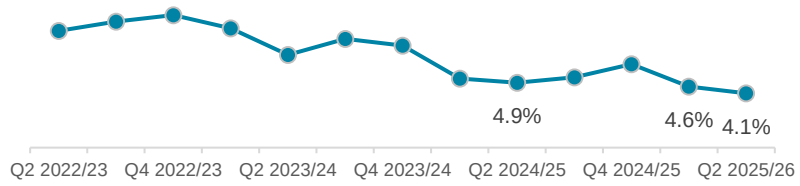
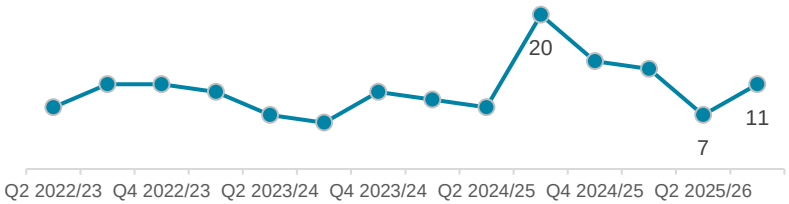
* This is a range of Local Authorities across the country using Infinistats.

Public Health & Health Protection Key Measures

RIDDOR-reportable accidents increased in Q3 2025/26 compared with Q2 2025/26, but remain below the volume recorded in Q3 2024/25. This indicates an overall year-on-year improvement, despite Q3 typically showing higher incident rates due to seasonal cold-weather conditions. The Council's target is to achieve 70% compliance with the completion of IOSH-approved mandatory Health & Safety eLearning by year-end. Overall progress remains on track, though increased engagement is required within the Children & Families, Public Health, and Corporate Resources teams to ensure the target is fully met.

Smoking at time of delivery rates have continued to improve in Q2 2025/26, falling to 4.1%. This represents a 0.5 percentage point improvement compared to Q1 and a 0.8 percentage point improvement compared with Q2 2024/25. Kirklees remains slightly better than the national benchmark (4.3%), reflecting the sustained impact of targeted smoking cessation interventions. Local maternity services continue to embed personalised behavioural support, alongside national initiatives such as the Swap to Stop scheme and the smoke-free pregnancy incentive programme, which offer practical tools and incentives to encourage successful quits. These combined efforts are contributing to healthier pregnancies and improved outcomes for families.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Smoking during pregnancy (mother's smoking status at time of delivery)*	Performance	4.1% (40 / 965) (Q2 2025/26)		**Better** by 0.5 percentage points compared with Q1 2025/26 **Better** by 0.8 percentage points compared with Q2 2024/25	Kirklees – 4.1% National – 4.3% Smoking during pregnancy (Q2 2025/26)
Number of RIDDOR reportable incidents	Performance	11 (Q3 2025/26)		**Worse** by 4 incidents compared with Q2 2025/26 **Better** by 9 incidents compared with Q3 2024/25	Kirklees - 224 National – 205 Rate of total reported non-fatal injury per 100,000 employees (2024/25)

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

Place

Skills & Regeneration Key Measures

The latest data shows the Kirklees employment rate at 76.4%, with 219,900 residents in work. Although the rate is marginally lower than last quarter (down 0.7 percentage points), the actual number of people in work has increased. This reflects a rise in the estimated working-age population within the survey sample rather than any deterioration in labour market performance. Overall, employment levels remain stable and broadly positive, continuing the upward trend seen since 2022.

Employers are showing greater caution in recruitment, influenced by recent changes to National Insurance and the National Minimum Wage. Kirklees is also experiencing a noticeable slowdown in recruitment activity, and nearly one-fifth of jobs in the district pay below the Real Living Wage, which continues to create challenges for jobseekers and employment support teams. This is contributing to reduced vacancy levels in some key sectors and reinforces the importance of targeted support for residents who face the greatest barriers to entering or progressing in work.

Council programmes have continued to focus on supporting residents who are economically inactive or furthest from the labour market. This aligns with national policy and funding streams, and demand for tailored support remains strong. Progress this quarter has been steady, although engagement remains challenging for some groups. Programmes continue to operate at capacity, with strengthened partnerships across DWP, VCSE organisations and training providers. Looking ahead, the focus will be on increasing targeted outreach to inactive residents particularly those with health conditions and caring responsibilities and strengthening employer engagement to understand changing recruitment patterns and identify new opportunities.

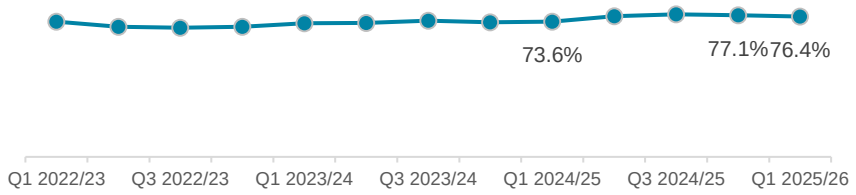
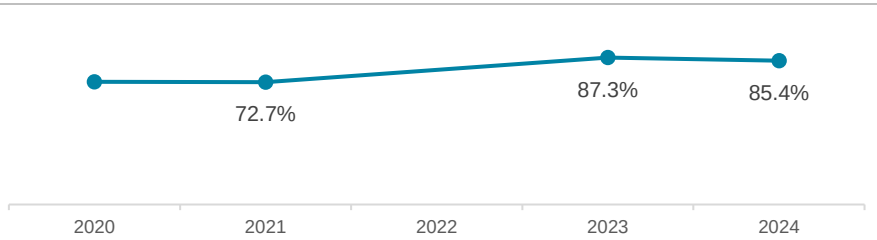
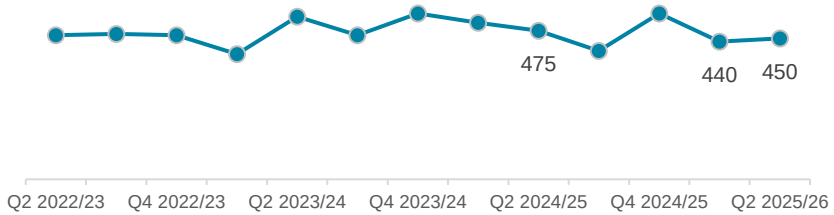
The proportion of working-age Kirklees residents with at least a Level 2 qualification is 85.4% (2024). This represents a slight decrease (1.9 percentage points) from 2023, though performance remains broadly in line with regional benchmarks. Adult learning programmes, and community-based provision continue to play a significant role in raising qualification levels. Demand for accessible, flexible adult learning remains high. The Council's work with Kirklees College and community providers continues to support progression for adults. Looking forward the Council will continue joint advocacy with Kirklees College and partners to secure long-term learning investment, expanding targeted adult learning opportunities linked to priority sectors, and reviewing community learning uptake and identifying areas where engagement could be improved.

There were 450 business births in Kirklees in Q2 2025/26 a modest increase on the previous quarter's figure of 445 but still some way below the recent high of 530 in Q4 2024/25. This is a whole-population measure in that not all start-ups access publicly-funded business support although research shows that those businesses that do access support are more likely to survive for at least 12 months. Although the macro-economic environment remains challenging, the Council's Start-Up Gateway and sector-specific programmes (including the Thrive health incubator and

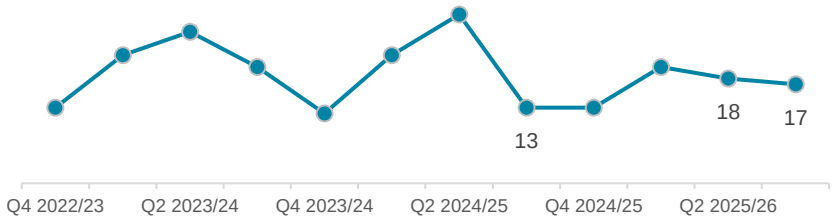
Ad:Venture scheme) continue to help residents prepare for and launch new ventures. This quarter saw continued delivery of advice, workshops, and incubator activity for business start-up clients and referral onto other support schemes where appropriate to meet client needs. Working with WYCA, the King's Trust and other key partners, looking forward the Council will continue to expand wraparound support focused on survival and sustainability during the first 12 months of trading; and continue to strengthen our use of data and insight to inform future provision.

The Council received 17 major planning applications in Q3 2025/26, a slight decrease on the previous quarter but an increase compared with the same period last year. Activity remains steady, though overall development appetite continues to be affected by viability constraints and market uncertainty. Development Management has focused on determining applications efficiently, offering pre-application advice, and ensuring compliance with approved plans and conditions. Despite strong approval levels, housing delivery remains below target due to limited new site allocations and viability issues on remaining Local Plan sites. Progress on the Local Plan continues, with evidence gathering underway. Recruitment efforts also remain ongoing to strengthen planning capacity, particularly in specialist roles. Looking ahead, there will be continued engagement with developers to understand barriers and unlock key sites; progressing Local Plan evidence work and reviewing new Government planning guidance, and strengthening internal capacity where recruitment allows.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Employment Rate*	Performance	76.4% (219,900 / 273,900) (Q1 2025/26)		**Worse** by 0.7 percentage points compared with Q4 2024/25 **Better** by 2.8 percentage points compared with Q1 2025/26	Kirklees – 76.4% Yorkshire and the Humber – 73.4% (Jul 2024 – Jun 2025)
Percent of population with at least level 2 qualification***	Performance	85.4% (229,500 / 269,500) (2024)		**Worse** By 1.9 percentage points compared with 2023 No comparison data available for 2022	Kirklees – 85.4% Yorkshire and the Humber – 85.1% (2024)
Business births**	Performance	450 (Q2 2025/26)		**Better** by 10 businesses compared with Q1 2025/26 **Worse** by 25 businesses compared with Q2 2024/25	Kirklees – 13 West Yorkshire – 12.9 Business births per 10,000 people aged 16+ (Jul-Sep 2025)

*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 Apr to Jun 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	17 (Q3 2025/26)		**Decrease** by 1 application compared with Q2 2025/26 **Increase** by 4 applications compared with Q3 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

Key data trends show that performance for emergency defect repairs is generally in line with both regional and national averages. However, slight shortfalls occurred, mainly due to resource limitations and higher demand during poor weather. Efforts are ongoing to improve responsiveness and transparency using real-time data systems. Overall, the service is meeting most of its main objectives, but continued work is needed to keep up with changing demands. The improvements will carry on focusing on better data collection and clear reporting to support further progress.

Highways and Streetscene services continued to demonstrate resilience and adaptability during Quarter 3 2025/26. Against a backdrop of seasonal pressures and increased demand, particularly following adverse weather events, performance largely remained in line with regional and national benchmarks. The percentage of emergency defects made safe within intervention timescales was slightly below target, reflecting challenges related to resource availability and fluctuating work volumes. In response, targeted workforce training and investment in AI/real-time operational systems have been prioritised, strengthening our capacity to respond quickly to emerging issues and improving transparency.

For Quarter 4, both Highways and Waste services will continue to build on the progress achieved in Quarter 3, with a clear focus on enhancing operational efficiency and community engagement. Looking ahead, the improvement programme will continue to develop robust datasets and dashboard reporting to further increase service transparency for both residents and councillors. Ongoing adjustments to service level agreements and operational strategies will ensure that Highways and Waste services remain responsive to evolving local needs, with a clear emphasis on continuous improvement and public accountability.

For Quarter 3 2025/26, waste collection rates stayed steady despite increases in waste due to seasonal changes and bad weather, which caused some temporary collection delays. Improved resource planning and route adjustments helped reduce disruptions. Digitisation will continue to make it easier to spot and fix missed collections. Targeted engagement has led to a small rise in recycling in some areas. The focus will remain on using data to guide operations and encouraging sustainable waste practices. Additional resource in fly tipping has seen numbers reduce.

On the waste management front, consistent collection rates were maintained despite variable waste volumes. Strategic reallocation of resources and enhanced route optimisation minimised delays, while digital tools enabled faster identification and resolution of missed collections and fly tipping incidents. Engagement initiatives aimed at boosting recycling participation saw modest but positive results in several neighbourhoods. The service remains committed to ongoing improvement, with efforts focused on refining operational processes, expanding the use of data-driven decision-making, and supporting sustainable practices to meet both environmental targets and community expectations.

Kirklees is actively supporting the Keep Britain Tidy initiative through a range of targeted actions aimed at improving local environmental quality. The council has enhanced its efforts to tackle fly tipping by allocating additional resources, resulting in a noticeable decrease in incidents, while community engagement has encouraged residents to participate in recycling and sustainable waste practices. These measures demonstrate Kirklees' ongoing commitment to cleaner streets and neighbourhoods, and its contribution to the broader goals of the Keep Britain Tidy campaign.

Waste services will maintain efforts to optimise collection routes and utilise data-driven decision-making to minimise missed collections and fly tipping incidents. Continued deployment of digital tools will help swiftly identify problem areas, while engagement campaigns will encourage higher rates of recycling and participation in sustainable practices. Additional resources will be directed towards tackling fly tipping, building on the positive reduction in incidents observed last quarter.

Kirklees' commitment to environmental quality remains steadfast, as evidenced by its active support for the Keep Britain Tidy initiative. Looking ahead, the first draft of the council's Flytipping and Litter Strategy is due for publication, signalling a significant step in formalising a long-term approach to cleaner streets and neighbourhoods. This strategy will further align service improvement plans with national priorities, ensuring that both Highways and Waste teams are well-positioned to deliver ongoing enhancements to local environmental standards

In Highways, targeted workforce programming led by data intelligence and ongoing investment in digital systems will remain central to improving response times for emergency defect repairs, particularly during periods of adverse weather and increased demand. The service aims to close performance gaps by focussing on preventative maintenance, refining resource allocation and strengthening real-time monitoring, ensuring that intervention timescales are consistently met.

Highway Services will increase its efforts around road safety initiatives by developing its Kirklees Vision Zero Board and review its delivery plans. New initiatives such Moving Traffic Offences will be developed to target areas to improve driver behaviour.

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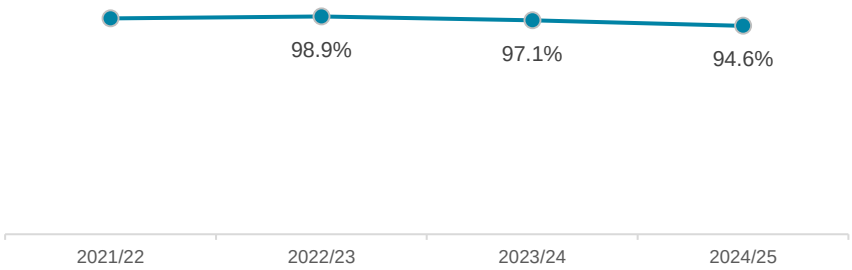
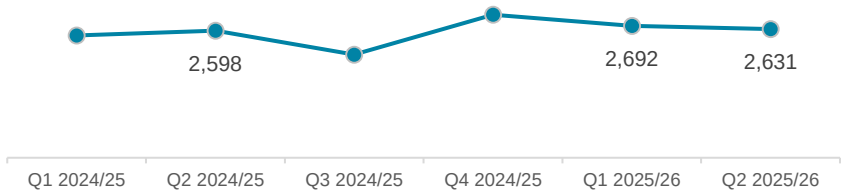
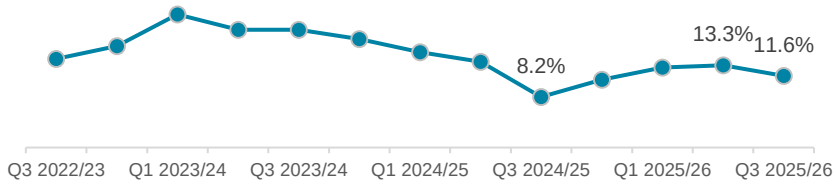
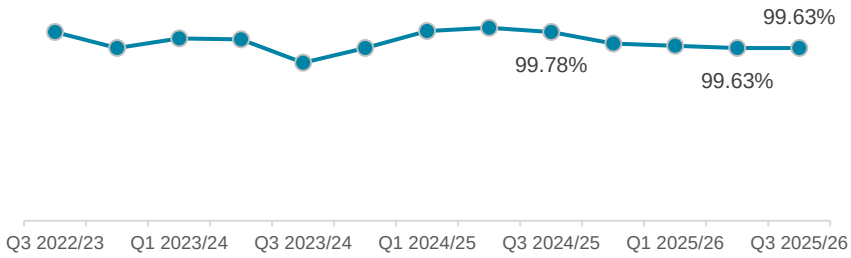
Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
% of emergency defects made safe within intervention timescales*	Performance	94.6% (2024/25)		**Worse** by 2.5 percentage points compared with 2023/24 **Worse** by 4.3 percentage points compared with 2022/23	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	2,631 (Q2 2025/26)		**Decrease** by 61 incidents compared with Q1 2025/26 **Increase** by 33 incidents compared with Q2 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	11.6% (533.9 / 4,620.76) (Q3 2025/26)		**Better** by 1.7 percentage points compared with Q2 2025/26 **Worse** by 3.4 percentage points compared with Q3 2024/25	Kirklees – N/A National – 16.6% % of contaminants in recycling+ (2024)

*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

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Collections without complaint (missed bins)	Performance	99.63% (2,524,973 / 2,534,457) (Q3 2025/26)		**Same** by 0 percentage points compared with Q2 2025/26 **Worse** by 0.15 percentage points compared with Q3 2024/25	Kirklees – N/A National – 85.69 Missed collection per 100,000 collections++ (2022/23)

++Missed collections per 100,000 collections data sourced from APSE, this is the most up to date data available

Homes & Neighbourhoods Key Measures

There has been an increase in the number of open damp, mould and condensation (DMC) cases, from 188 in Q2 2025/26 to 393 in Q3 2025/26. This is in line with expectations as we become more proactive in the identification of cases and is still within the business-as-usual tolerance. As expected for the time of year, there has been an increase in open DMC cases from the position at the end of Q2. The team remain responsive and are able to resource the increasing demand. The average length of open DMC cases has reduced to 22 days for the year as opposed to 29 days in Q2 and since the implementation of Awaab's Law on 27 October 2025, the average is nine days. DMC cases will continue to be managed within business-as-usual resourcing, however, should there be an increase, the Council will utilise the third-party contractor available through the framework to ensure continued compliance with Awaab's Law.

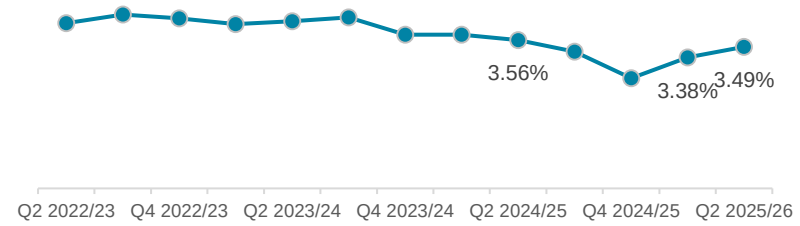
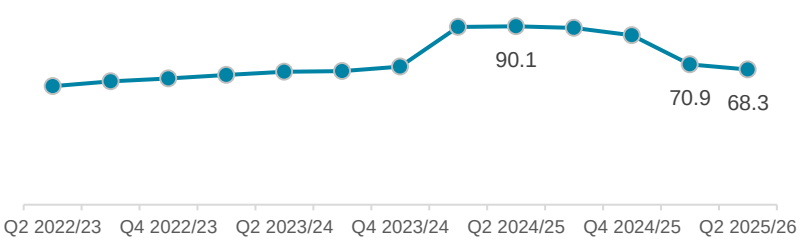
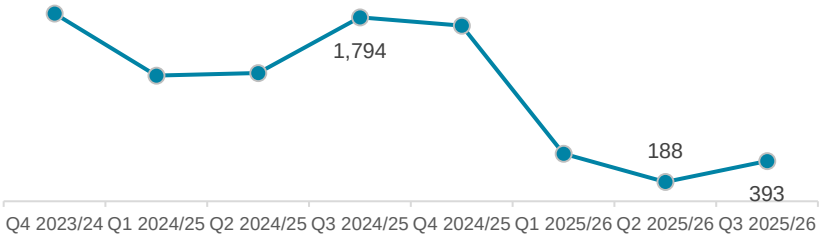
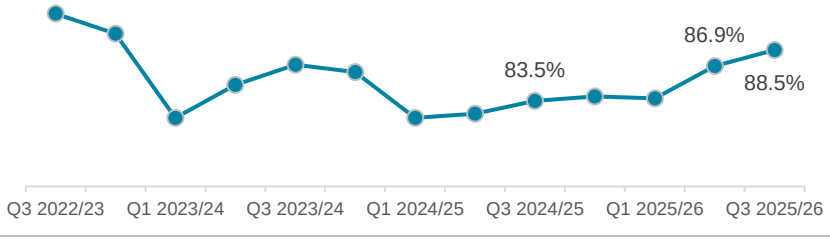
Positively, there has been an increase in the proportion of non-emergency responsive repairs completed within timescale, from 86.9% in Q2 2025/26 to 88.5% in Q3 2025/26. Property Services continue to challenge performance in the area of responsive repairs. Encouragingly, a reduction in job completion times across all trades has been reported. The team continue to engage with residents to keep them informed of any repair delays and monitor satisfaction survey responses, proactively contacting residents that return a low score. The Responsive Repairs team are investigating the decline in first fix and continue to challenge performance. Proactively, work to improve first fix is in place; vans are better stocked to complete repairs at the first-time visit and there is a focus on improving decision making whilst on site. The drive to complete jobs first time has already led to a reduction in the average days taken to complete jobs across all trades. Residents are kept informed of any delays in completing repairs in a timely manner.

At the end of Q3, all 837 residential blocks had a Fire Risk Assessment (FRA), 39 commercial Fire Risk Assessments had also been completed. In line with council policy, we carry out some FRAs every 12 months. At the end of Q3 there were 20 blocks that were overdue, this was due to a delay in awarding the FRA contractor a contract extension. Work to carry out the overdue FRAs will commence in January 2026. All overdue FRAs completed and new FRA programme initiated to carry out risk assessments based on archetype and risk status on either annual or three-yearly basis.

Following the introduction of a new housing management system in October 2025, it has not been possible to report on some of the golden measures, this is why there is missing data relating to arrears and average days to re-let. Moving to a new reporting platform has presented a challenge, and the pre-built reports are not currently available. Rectifying this issue is a high priority for the service and our colleagues in Data and Insight are working on the reports to enable Homes and Neighbourhoods to report on key performance measures. During the last quarter the teams responsible for the housing allocations were moved under Property Services. This will lead to improvements in how the Property Services Empty Homes Team and the allocating teams communicate and work together to reduce delays in lettings. The team have also been allocated a Housing Management resource to quickly deal with any tenancy related issues that can cause blockages in the empty homes team.

The Income Management Team do have access to current and former balance reports. Further work is required to refine this report to ensure that KPI's can be monitored and to give a breakdown of team/officer performance. The service is confident that the arrears policy is working in CX and accounts that require action are being presented correctly. The CX reporting issues will be resolved to enable clear performance reporting.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of rents in arrears.	Performance	3.49% (£3,336,957 / £95,541,932) (Q2 2025/26)		**Worse** by 0.11 percentage points compared with Q1 2025/26 **Better** by 0.07 percentage points compared with Q2 2024/25	Kirklees – 3.2% Statistical Neighbours– 3.2% Current tenant arrears % (Q4 2024/25)
Average days to re-let time.	Performance	68.3 (Q2 2025/26)		**Better** by 2.7 days compared with Q1 2025/26 **Better** by 21.8 days compared with Q2 2024/25	Kirklees – 85.49 Statistical Neighbours – 51.6 (Q4 2024/25)
Number of open damp, mould and condensation cases	Demand	393 (Q3 2025/26)		**Increase** by 205 cases compared with Q2 2025/26 **Decrease** by 1,401 cases compared with Q3 2024/25	Kirklees – 15.47% Statistical Neighbours– 16.3% Damp and mould live cases as a % of stock (Q4 2024/25)
Proportion of non-emergency responsive repairs completed within timescale.	Performance	88.5% (38,353 / 43,318) (Q3 2025/26)		**Better** by 1.6 percentage points compared with Q2 2025/26 **Better** by 5.0 percentage points compared with Q3 2024/25	Kirklees – 83.9% National – 82.6% % of non-emergency repairs completed within target timescale (Q4 2024/25)

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

Development Key Measures

Good progress has been made on supporting households in temporary accommodation whilst there has been a slight increase on Q2, comparison with same quarter last year shows a further decrease of 46.

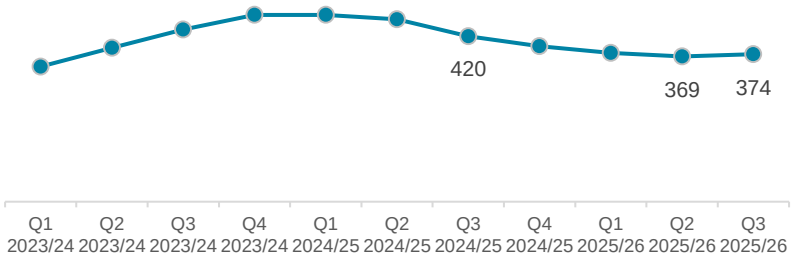
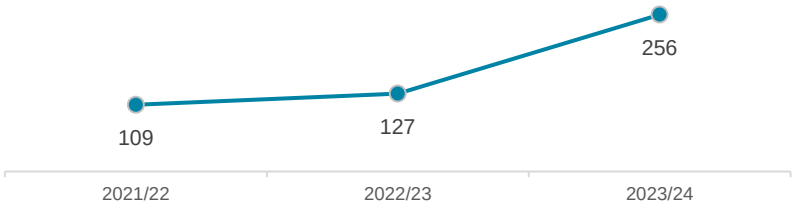
Our new family fixed temporary accommodation capacity is now in use with all units occupied. This accommodation supports better outcomes for family's as we continue to support them to find a permanent home. We continue to explore opportunity's including the purchase of some private stock with several potential partners. Discharge into private sector stock continues at pace, as does work on prevention with just over 200 prevention cases supported in the last quarter. Early conversations around renters' rights impact and governments new plan for ending homelessness, have started.

Work has started on understanding how the registered providers can support with homes for temporary accommodation and increased nominations into current stock, this work will need to feed into the governments new housing targets and funding streams. Early conversations led with support from Homes and Neighbourhoods have started and we welcome any lever which enables social landlords to cooperate with Local Authorities in housing homeless households.

Looking ahead, Further work will be undertaken on the impact of renter's rights and understanding the Kirklees impact of the plan for ending homelessness, in particular rouge landlords, supported accommodation, and residents leaving a public institution. There will also be a new focus on reduced reliance on nightly paid accommodation as well as continuing the reduction in bed and breakfast accommodation.

Progress on affordable homes (of all types) is continuing but data is updated annually in dec and has not yet been received.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of households in temporary accommodation.	Demand	374 (Q3 2025/26)		**Increase** by 5 households compared with Q2 2025/26 **Decrease** by 46 households compared with Q3 2024/25	Kirklees – 1.93 Bradford – 1.97 Calderdale - 0.87 Leeds - 1.67 Wakefield - 1.67 Number of households in temporary accommodation per 1,000 households (Q3 2024/25)
Gross Affordable Housing Completions	Performance	256 (2023/24)		**Better** by 129 homes delivered compared with 2022/23 **Better** by 147 homes delivered compared with 2021/22	No benchmarking data is available

Environment Strategy & Climate Change Key Measures

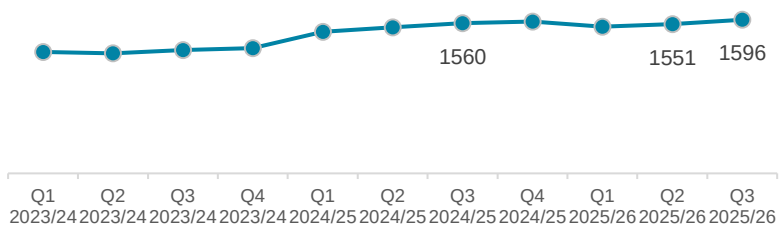
The number of students in Kirklees receiving home-to-school support has risen, reflecting national trends. The growth in Education Health and Care Plans (EHCPs) is associated with an increase in pupils eligible for home-to-school transport services.

We are obliged to provide home to school transport for all eligible pupils, we do not expect a decrease in the number qualifying for this support. Consequently, our main priority is to contain costs and boost efficiency, so that we can accommodate rising pupil numbers within existing budget limits. Monitoring this as a 'golden measure' allows us to clearly track demand for the service and respond appropriately with a comprehensive transformation programme which is aimed at streamlining operations and achieving greater cost-effectiveness in service delivery.

In the last quarter as part of our transformation, we launched our 'In House Fleet' pilot to test the feasibility and economics of providing routes via an in-house provision. We have 8 operational minibuses supporting the wider home to school service. We continue to carry out reviews of our single taxi provision to ensure that we are as efficient as possible. We have carried out a procurement exercise to improve the ICT back office of the service.

The transformation programme is continuing, this aims to ensure that despite the increasing numbers of students receiving transport the cost base is managed to be within existing budgets through increasing efficiency and improve cost and prices. This will include investment in the IT to support data management, routing and analysis. As well as better methods of procurement supported by changes to public procurement rules and increasing the operator base.

Key measures:

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of children accessing home to school transport	Demand	1,596 (End of Q3 2025/26)		**Increase** by 45 children compared with Q2 2025/26 **Increase** by 36 children compared with Q3 2024/25	DfT are looking at collecting data nationally next year

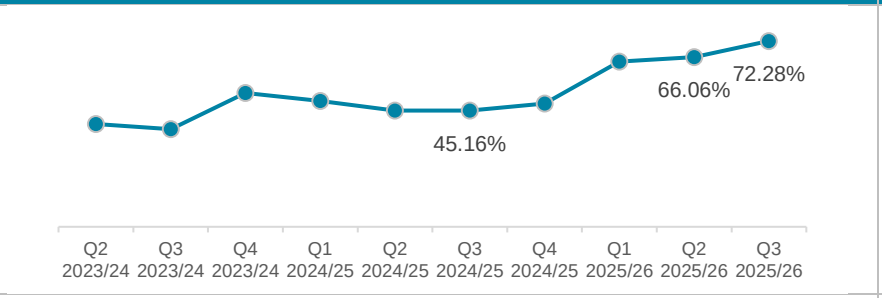
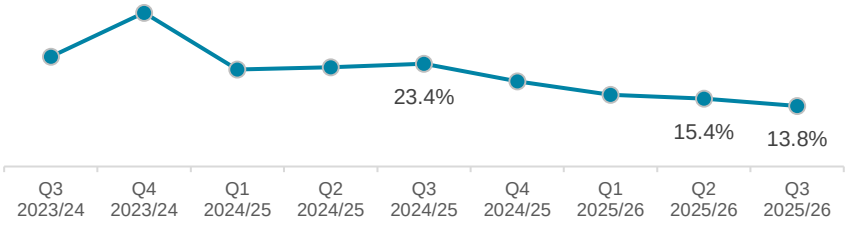
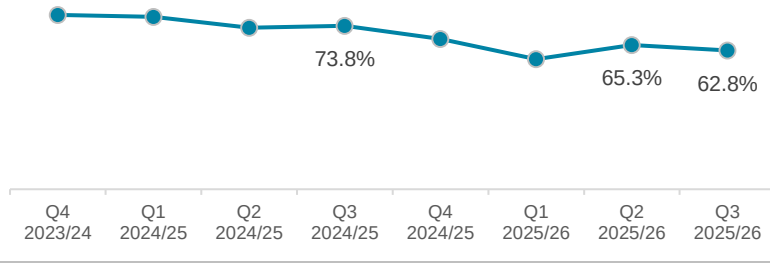
** Prior to 2024/25 personal travel budgets (PTBs) and mileage were always an option to parents but were not the main focus of the service. The main focus was providing physical transport, and the vast majority of children were transported in taxi's / mini-buses, and therefore data on PTBs and mileage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

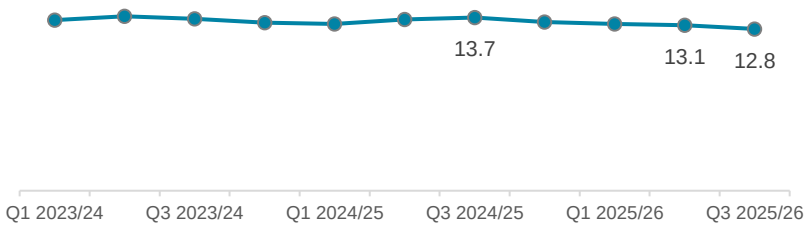
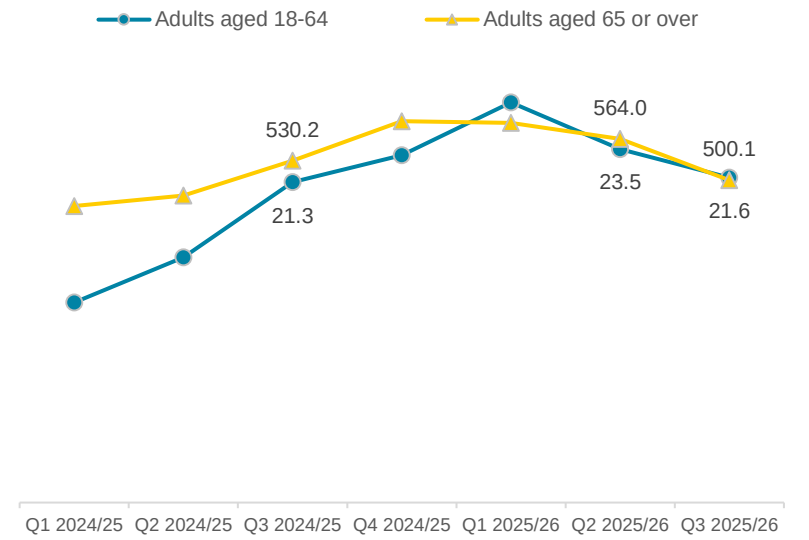
The focus of the service has now changed to offering a personal travel budget instead of physical transport through the introduction of enhanced personal travel budget offer and post-16 transport statement introduction of default offer of personal travel budget as opposed to physical transport. This 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.

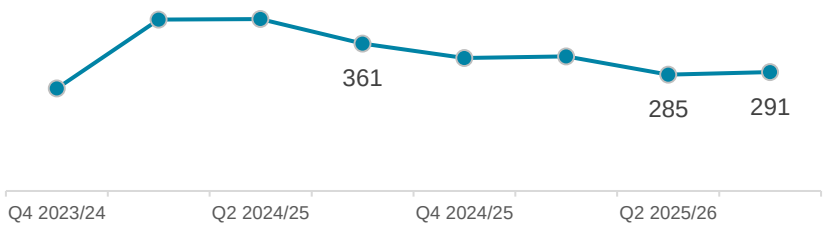
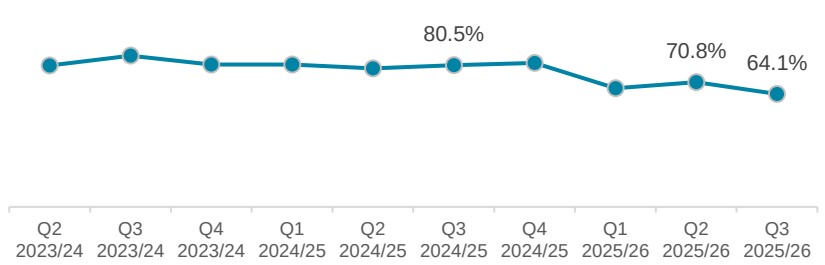
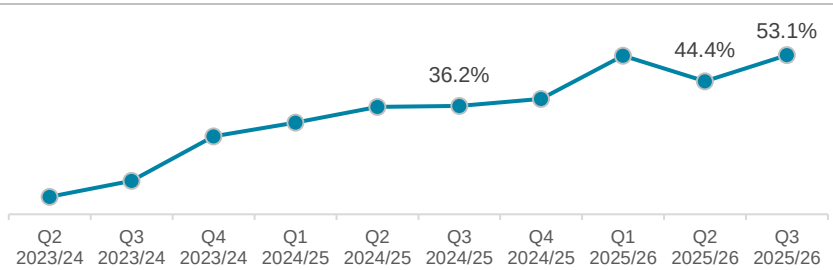
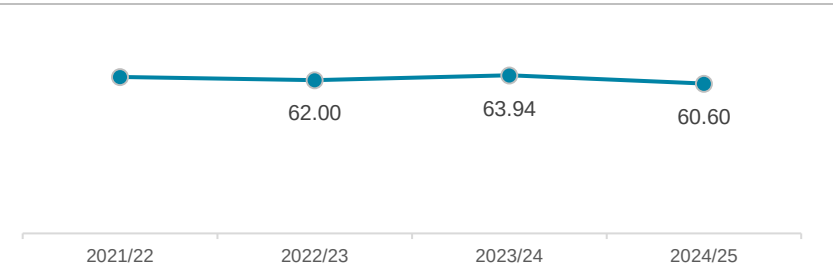
Appendix A – Council Measures

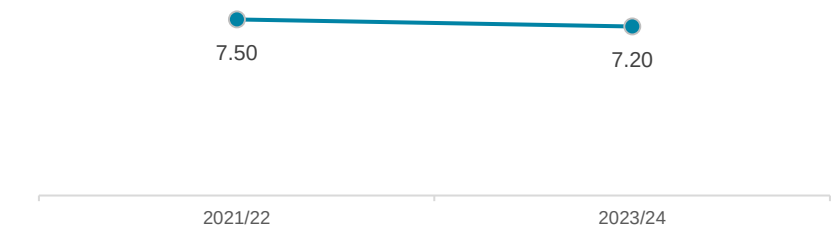
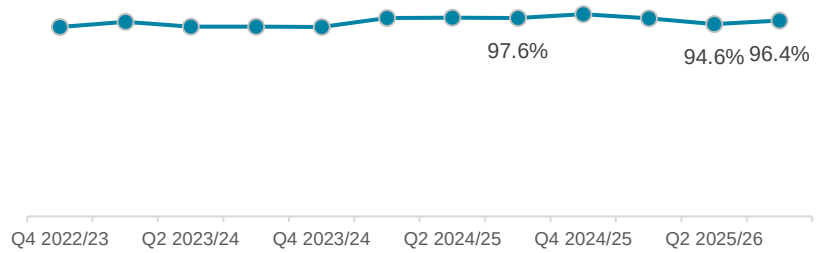
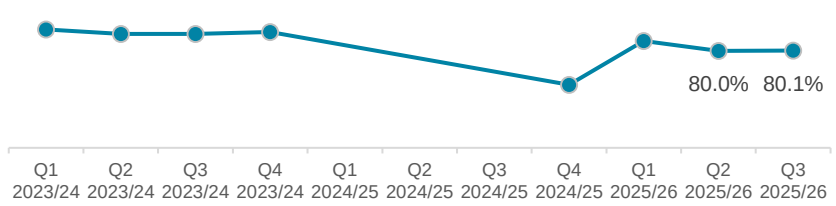
Adults and Health

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	72.28% (Q3 2025/26)		**Better** by 6.23 percentage points compared with Q2 2025/26 **Better** by 27.12 percentage points compared with Q3 2024/25	No benchmarking data is available
% Contacts to ASC that progress to an Assessment	Performance	13.8% (Q3 2025/26)		**Better** by 1.6 percentage points compared with Q2 2025/26 **Better** by 9.6 percentage points compared with Q3 2024/25	No benchmarking data is available
% Care Act Assessments that progressed to a long-term service	Performance	62.8% (Q3 2025/26)		**Worse** by 2.5 percentage points compared with Q2 2025/26 **Worse** by 11.1 percentage points compared with Q3 2024/25	No benchmarking data is available

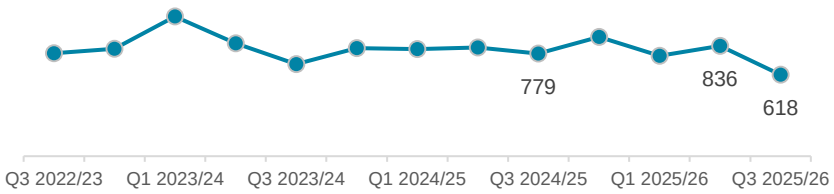
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Average commissioned home care hours per user.	Demand	12.80 (End of Q3 2025/26)		**Decrease** by 0.3 hours per user compared with the end of Q2 2025/26 **Decrease** by 0.9 hours per user compared with the end of Q3 2024/25	Kirklees – 13.5 National – 14.4 (2023/24)
Permanent admissions to residential care per 100,000 population for adults aged 65 or over.	Demand	500.1 (End of Q3 2025/26)		**Decrease** by a rate of 63.9 users compared with the end of Q2 2025/26 **Decrease** by a rate of 30.1 users compared with the end of Q3 2024/25	Kirklees – 500.1 National – 592.5 (2024/25)
Permanent admissions to residential care per 100,000 population for adults aged 18-64	Demand	21.6 (End of Q3 2025/26)		**Decrease** by a rate of 1.9 users compared with the end of Q2 2025/26 **Increase** by a rate of 0.3 users compared with the end of Q3 2024/25	Kirklees – 21.3 National – 17 (2024/25)

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of people waiting for an ASC assessment	Performance	291 (End of Q3 2025/26)		**Worse** by 6 people compared with the end of Q2 2025/26 **Better** by 70 people compared with the end of Q3 2024/25	No benchmarking data available
% discharges from Reablement where independence has been maximised	Performance	64.1% (474 / 304) (Q3 2025/26)		**Worse** by 6.7 percentage points compared with Q2 2025/26 **Worse** by 16.4 percentage points compared with Q3 2024/25	Kirklees - 86.9 National - 77.1 (2024/25)
% discharges from recovery beds to the community	Performance	53.1% (34 / 64) (Q3 2025/26)		**Better** by 8.7 percentage points compared with Q2 2025/26 **Better** by 17 percentage points compared with Q3 2024/25	Benchmarking data not publicly available
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 Q1 2025/26 **Worse** by 1.4 percentage points compared with Q2 2024/25	Kirklees - 60.6 National - 65.1 (2024/25)

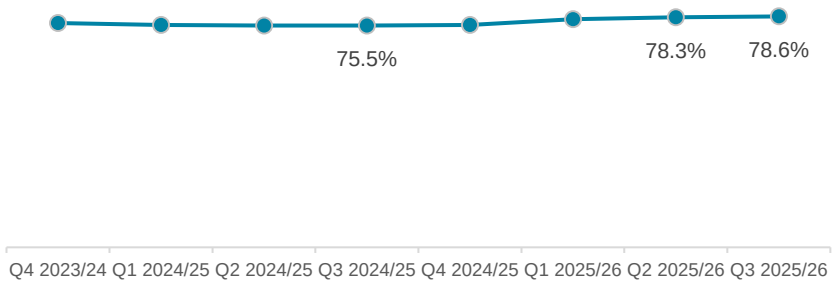
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Carers of people in ASC quality of life (assess the overall quality of life of carers who support individuals with adult's social care needs) **	Performance	7.2 (2023/24)		**Worse** by 0.3 compared with 2021/22 No comparison data available for 2019/20	Kirklees - 7.2 National - 7.3 (2023/24)
% s42 safeguarding enquiries where the risk was reduced or removed.	Performance	96.4% (664 / 689) (Q3 2025/26)		**Better** by 1.8 percentage points compared with Q2 2025/26 **Worse** by 1.2 percentage points compared with Q3 2024/25	Kirklees – 99% National – 91% (2024/25)
% S42 safeguarding enquiries where making safeguarding personal outcomes were met.	Performance	80.1% (Q3 2025/26)		**Better** by 0.1 percentage points compared with Q2 2025/26 No comparison data available for Q3 2024/25	Kirklees – 95.4% National – 94.2% (2023/24)

*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

Communities and Access Services Measures

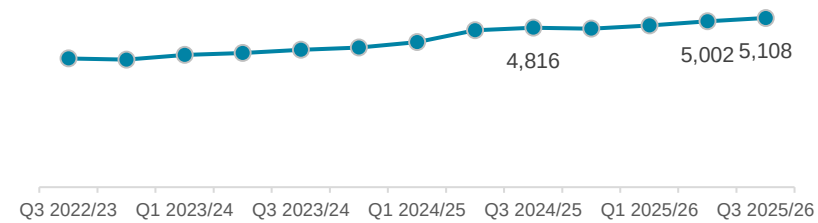
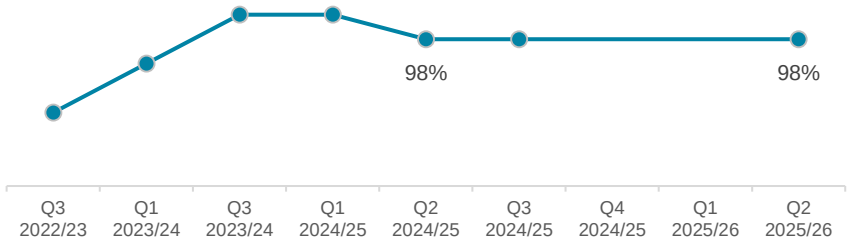
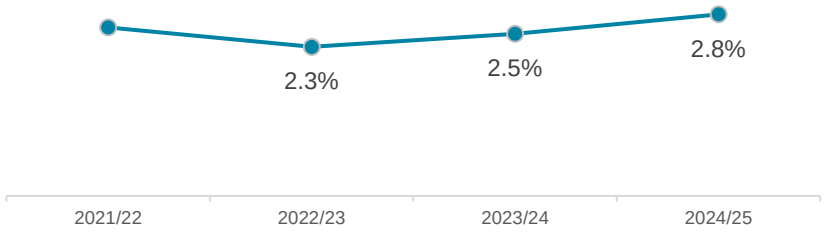
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Total number of referrals to Wellness Service	Demand	618 (Q3 2025/26)		**Decrease** by 218 referrals compared with Q2 2025/26 **Decrease** by 161 referrals compared with Q3 2024/25	No benchmarking data is available

Integrated Commissioning Measures

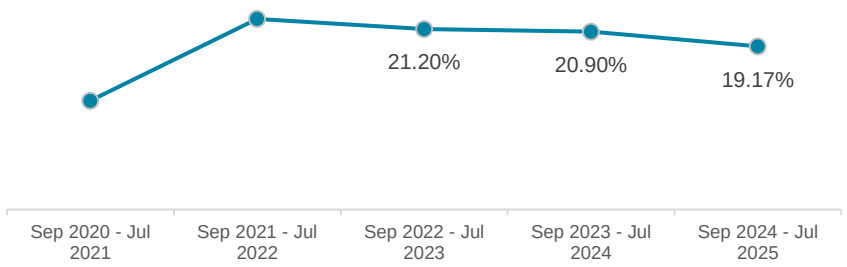
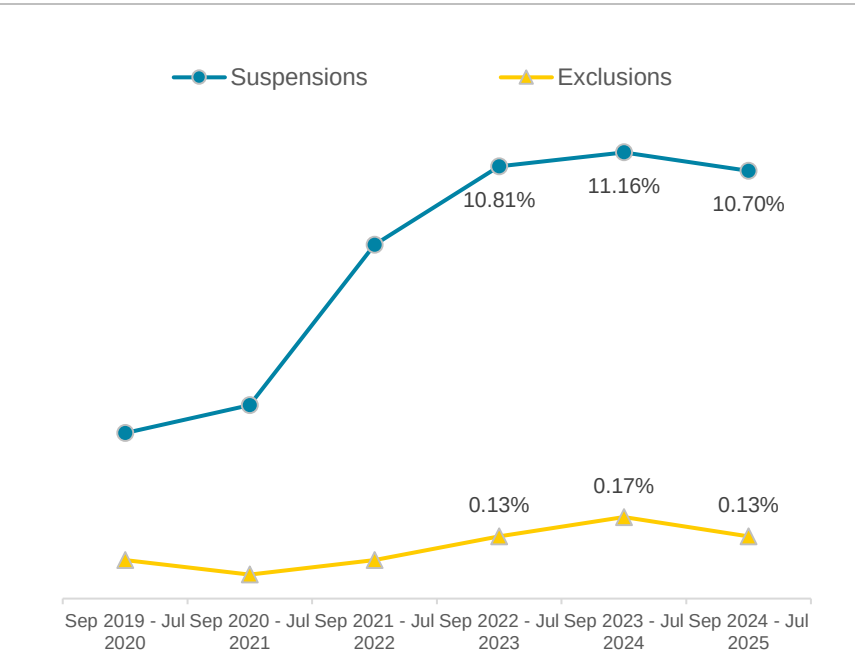
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
% Kirklees ASC providers judged as good or outstanding by CQC	Performance	78.6% (147 / 187) (End of Q3 2025/26)		**Better** by 0.3 percentage points compared with the end of Q2 2025/26 **Better** by 3.1 percentage points compared with the end of Q3 2024/25	Kirklees – 78.6% National – 83.4% (Q3 2025/26)

Children and Families

Learning & Early Support Measures

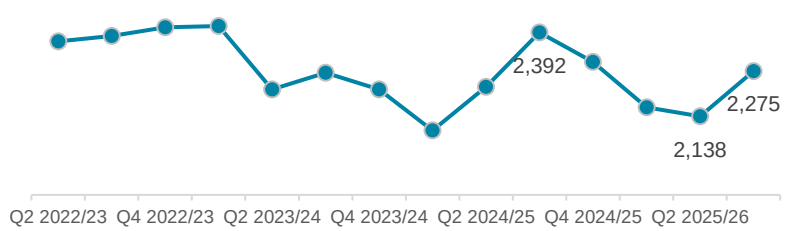
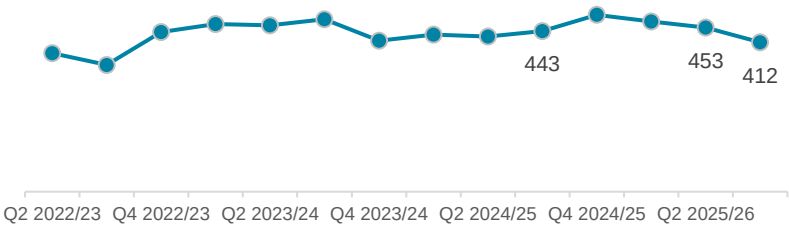
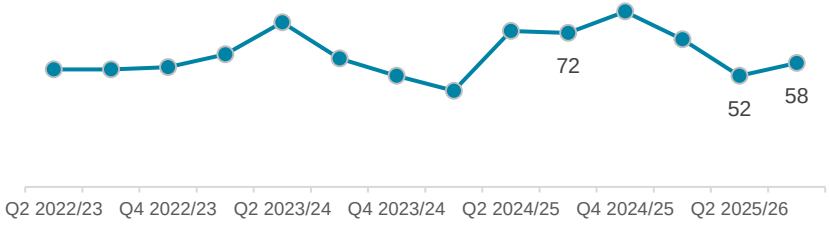
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Education, Health, and Care Plans	Demand	5,108 (Q3 2025/26)		**Increase** by 106 EHC plans compared with Q2 2025/26 **Increase** by 292 EHC plans compared with Q3 2024/25	Kirklees – 4.8% Statistical Neighbours – 5.5% % of pupils with statement of SEN or EHC Plans (2024)
Percentage of inspected Early Years providers rated Good or better by Ofsted*	Performance	98% (278 / 283) (Q2 2025/26)		**Same** by 0 percentage points compared with Q3 2024/25 **Same** by 1 percentage points compared with Q2 2024/25	Kirklees - 98% National - 98% Percentage of inspected Early Years providers rated Good or better by Ofsted (Q2 2025/26)
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 – 2.9% Statistical Neighbours - 5% (2024/25)

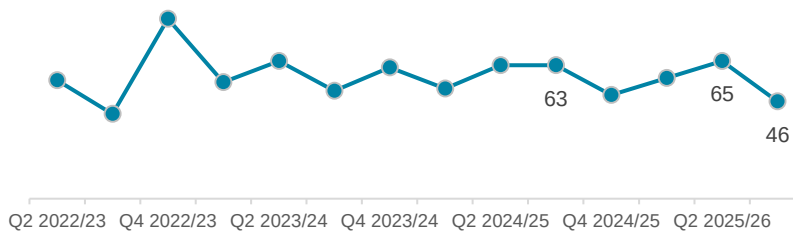
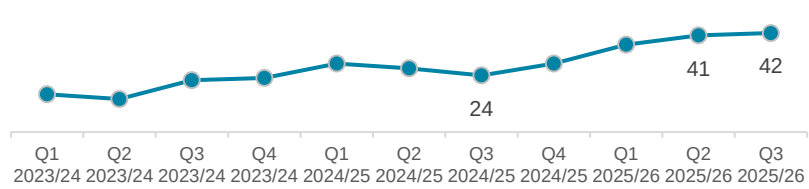
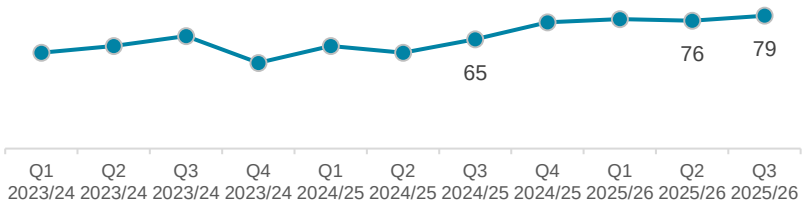
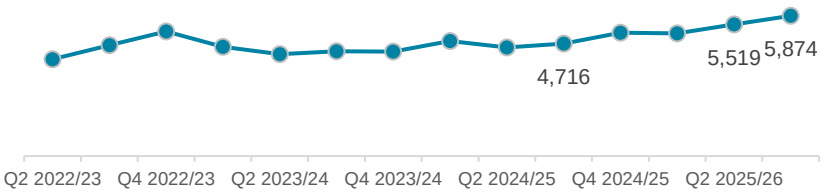
*Most recent data available, Q2 2025/26
**Annually collected measure, no data available for quarter 3 2025/26

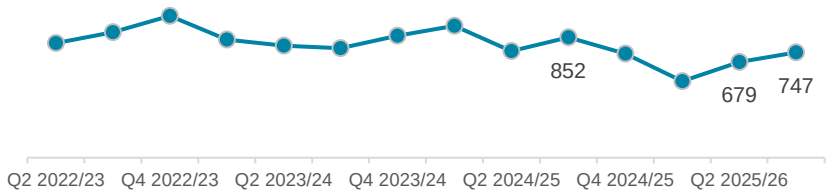
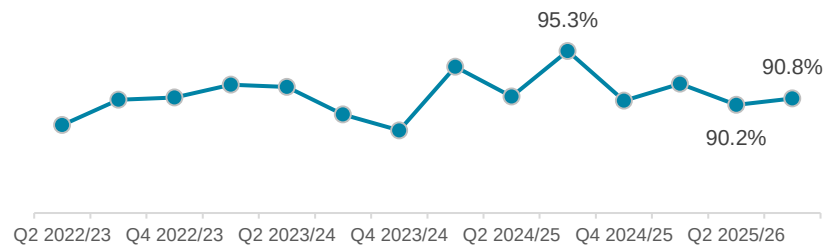
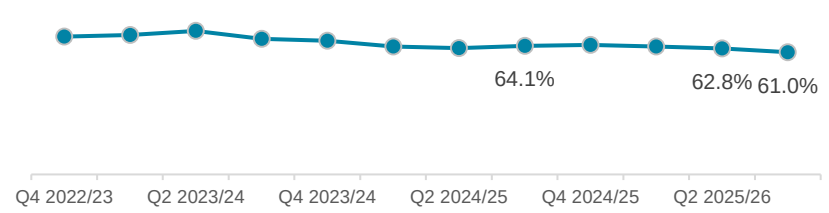
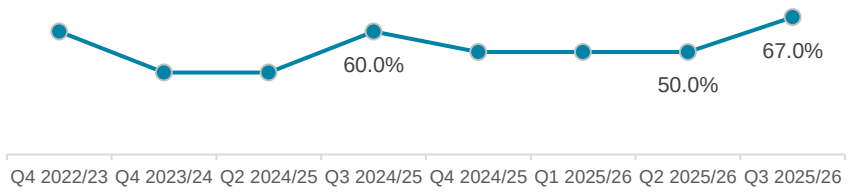
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of pupils who are persistently absent (attendance below 90%) from school*	Performance	19.17% (Sep 2024 – Jul 2025)		**Better** by 1.73 percentage points compared with 2023/24 academic year **Better** by 2.03 percentage points compared with 2022/23 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	10.7% (7,315 / 68,391) (Sep 2024 – Jul 2025)		**Better** by 0.46 percentage points compared with 2023/24 academic year **Better** by 0.11 percentage points compared with 2022/23 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	0.13% (89 / 68,391) (Sep 2024 – Jul 2025)		**Better** by 0.04 percentage points compared with 2023/24 academic year **Same** by 0.0 percentage points compared with 2022/23 academic year	Kirklees – 0.13% National – 0.11% Permanent Exclusions rate (Q1 2023/24)

*Annually collected measure, most up to date academic data available

Child Protection & Family Support Measures

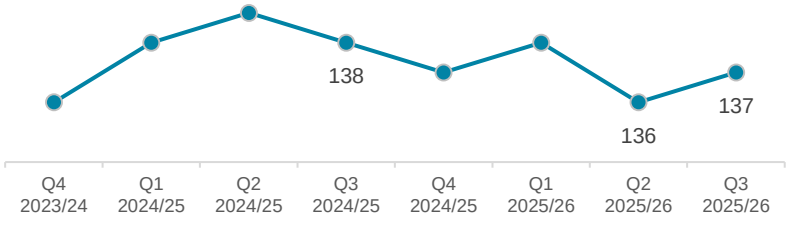
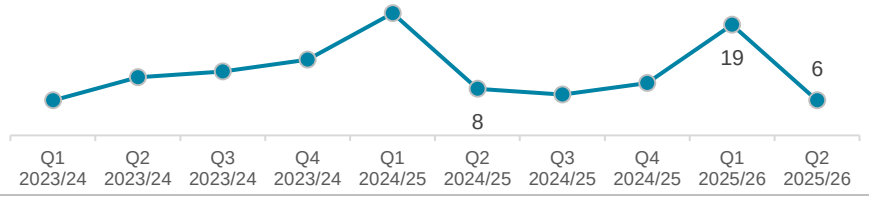
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Children in Need	Demand	2,275 (Q3 2025/26)		**Increase** by 137 children compared with Q2 2025/26 **Decrease** by 117 children compared with Q3 2024/25	Kirklees – 222.1 Statistical Neighbours – 387 Children in Need rate per 10,000 (2024/25)
Number of children with a Child Protection Plan	Demand	412 (Q3 2025/26)		**Decrease** by 41 children compared with Q2 2025/26 **Decrease** by 31 children compared with Q3 2024/25	Kirklees – 48.4 Statistical Neighbours – 55.9 Children who are the subject of a CPP - rate per 10,000 (2024/25)
Number of children and young people starting to be looked after in the quarter	Demand	58 (Q3 2025/26)		**Increase** by 6 children compared with Q2 2025/26 **Decrease** by 14 children compared with Q3 2024/25	Kirklees – 27 Statistical Neighbours – 32.9 Rate of children starting to be looked after each year (2024/25)

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of Children Looked After ceasing to be looked after in the quarter	Demand	46 (Q3 2025/26)		**Decrease** by 19 children compared with Q2 2025/26 **Decrease** by 17 children compared with Q3 2024/25	Kirklees – 23 Statistical Neighbours – 34 Rate of children ceasing to be looked after each year (2024/25)
Number of Children Looked After in an external residential provision	Demand	42 (Q3 2025/26)		**Increase** by 1 child compared with Q2 2025/26 **Increase** by 18 children compared with Q3 2024/25	No benchmarking data is available
Number of Children Looked After aged 16-18 in semi supported accommodation external residential provision	Demand	79 (Q3 2025/26)		**Increase** by 3 children compared with Q2 2025/26 **Increase** by 14 children compared with Q3 2024/25	No benchmarking data is available
Number of contacts to children's services	Demand	5,874 (Q3 2025/26)		**Increase** by 355 contacts compared with Q2 2025/26 **Increase** by 1,158 contacts compared with Q3 2025/26	No benchmarking data is available

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of referrals to children's social care	Demand	747 (Q3 2025/26)		**Increase** by 68 referrals compared with Q2 2025/26 **Decrease** by 105 referrals compared with Q3 2024/25	Kirklees – 328.3 Statistical Neighbours – 604 Rate per 10,000 of referrals to Children's Social Services (2024/25)
Percentage of Care Leavers in suitable accommodation	Performance	90.8% (315 / 347) (Q3 2025/26)		**Better** by 0.6 percentage points compared with Q2 2025/26 **Worse** by 4.5 percentage points compared with Q3 2024/25	Kirklees – 91% Statistical Neighbours – 90.3% % in suitable accommodation (Q4 2024/25)
Percentage of Care leavers in Employment, Education or Training (of those available for EET)	Performance	61.0% (Q3 2025/26)		**Worse** by 1.8 percentage points compared with Q2 2025/26 **Worse** by 1.3 percentage points compared with Q3 2024/25	No benchmarking data available this is a locally specified measure
Percentage of Children's Homes rated Good or better by Ofsted*	Performance	67% (4 / 6) (Q3 2025/26)		**Better** by 17 percentage points compared Q2 with 2025/26 **Better** by 7 percentage points compared with Q3 2024/25	No benchmarking data is available

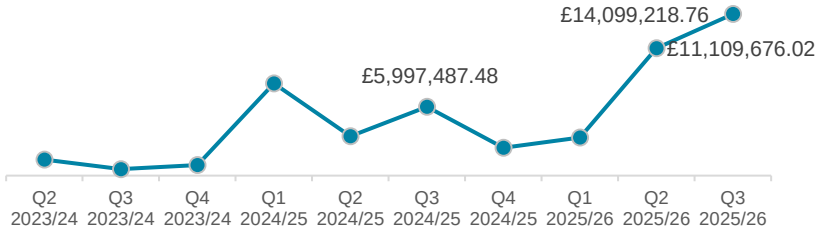
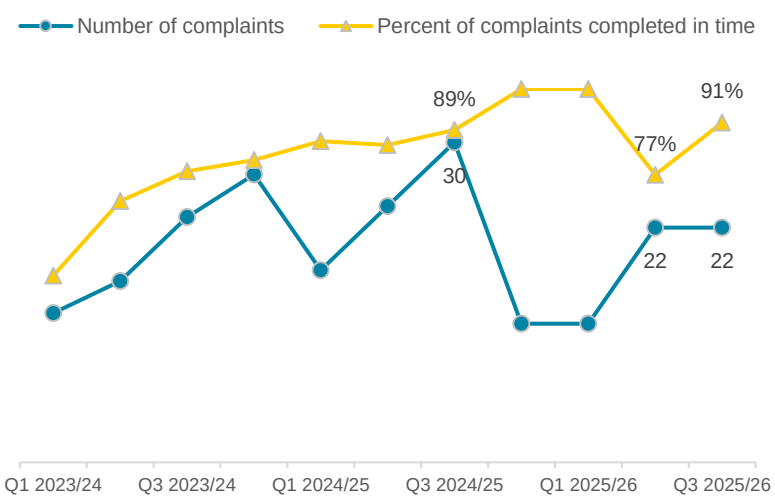
*A new care home was added during quarter 4 2024/25 which altered both the denominator and numerator

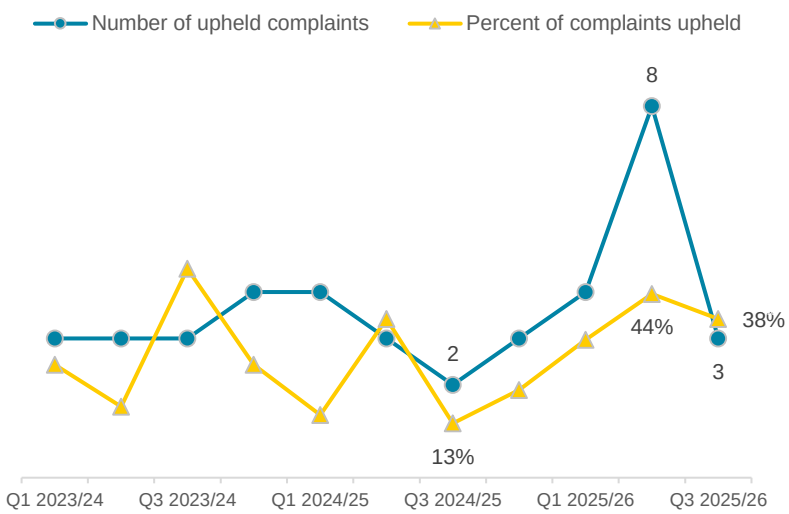
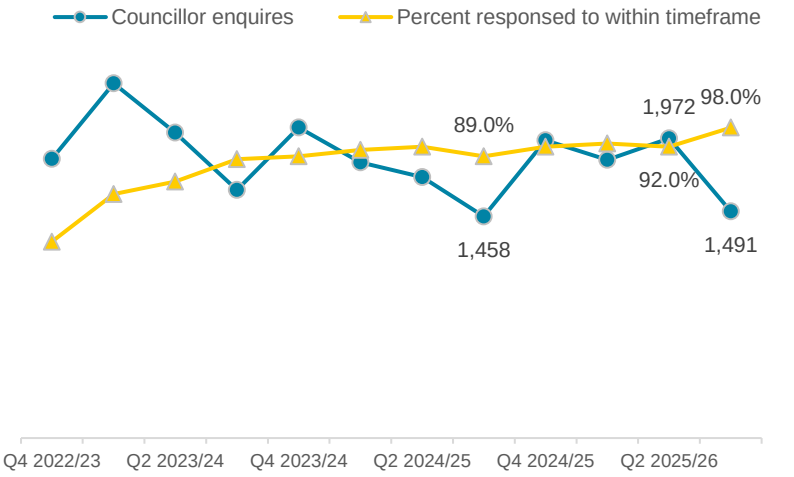
Resources, Improvement & Partnerships Measures

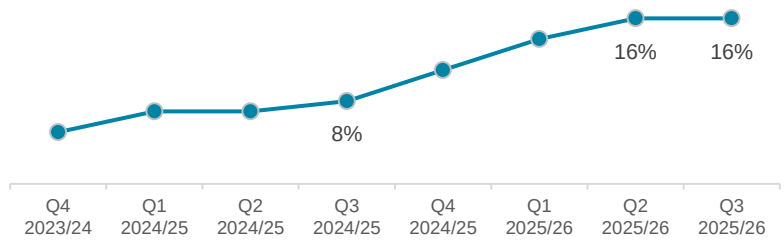
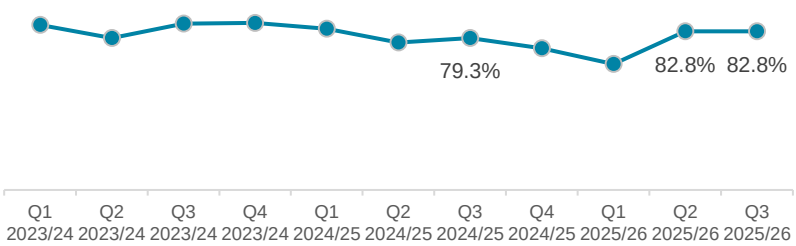
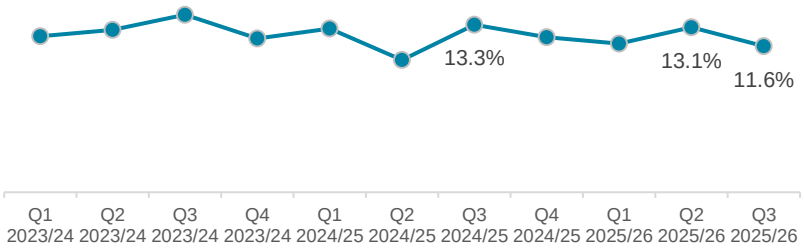
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of mainstream foster carer households in Kirklees	Demand	137 (Q3 2025/26)		**Increase** by 1 household compared with Q2 2025/26 **Decrease** by 1 household compared with Q3 2024/25	No benchmarking data is available
Waiting times for child mental health services for month at quarter end (time in weeks)	Performance	6 (Q2 2025/26)		**Better** by 13 weeks compared with Q1 2025/26 **Better** by 2 weeks compared with Q2 2024/25	No benchmarking data is available

Public Health and Corporate Resources

Corporate Resources Measures

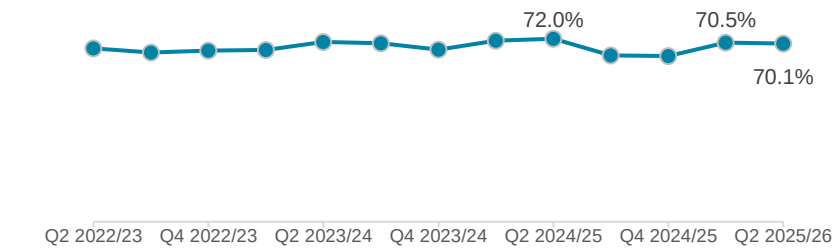
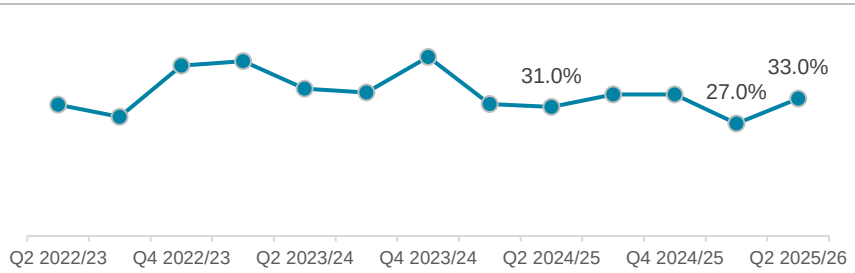
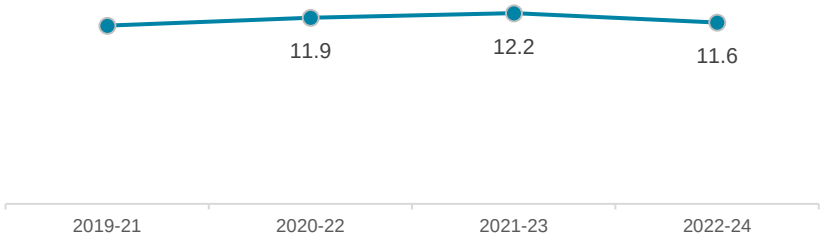
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Total £ Social Value delivered (derived from contracts above £100k per annum with commitments recorded via the Social Value Portal)	Performance	£14,099,219 (Q3 2025/26)		**Better** by £2.9M compared with Q2 2024/25 **Better** by £8.1M compared with Q3 2024/25	No benchmarking data is available
Percent of stage 3 complaints completed in time	Performance	91% (20 / 22) (Q3 2025/26)		**Better** by 14 percentage points compared with Q2 2025/26 **Better** by 2 percentage points compared with Q3 2024/25	No benchmarking data is available due to different complaints process across Council's
Number of stage 3 complaints received	Demand	22 (Q3 2025/26)		**Static** by 0 complaints compared with Q2 2025/26 **Decrease** by 8 complaints compared with Q3 2024/25	No benchmarking data is available due to different complaints process across Council's

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
No. of Ombudsman complaints upheld	Performance	3 (Q3 2025/26)		**Worse** by 5 complaints compared with Q2 2025/26 **Better** by 1 complaint compared with Q3 2024/25	Kirklees – 3.6 Bradford – 4.6 Calderdale – 10.5 Leeds – 7.5 Wakefield – 1.7 Upheld decisions per 100,000 residents (2024/25)
Percent of Ombudsman complaints upheld	Demand	38% (3 / 8) (Q3 2025/26)		**Worse** by 6 percentage points compared with Q2 2025/26 **Better** by 25 percentage points compared with Q3 2024/25	Kirklees - 94% National - 81% (2024/25)
Percent of Councillor enquires (across the whole Council) responded to within timeframe	Performance	98% (Q3 2025/26)		**Better** By 6 percentage points compared with Q2 2025/26 **Better** By 9 percentage points compared with Q3 2024/25	No benchmarking data is available
Number of Councillor enquires received across the whole Council	Demand	1,491 (Q3 2025/26)		**Decrease** By 481 enquiries compared with Q2 **Increase** By 33 enquires compared with Q3 2024/25	No benchmarking data is available

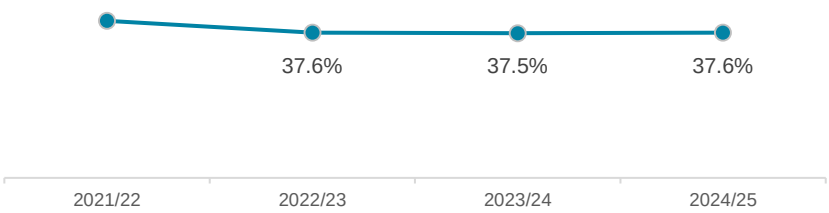
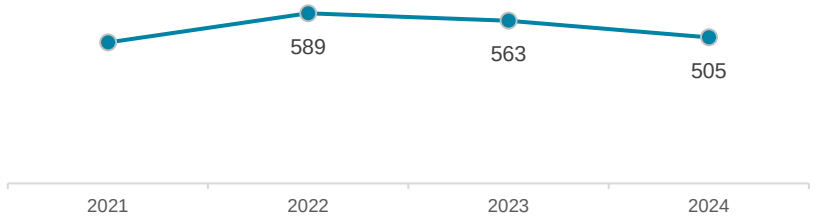
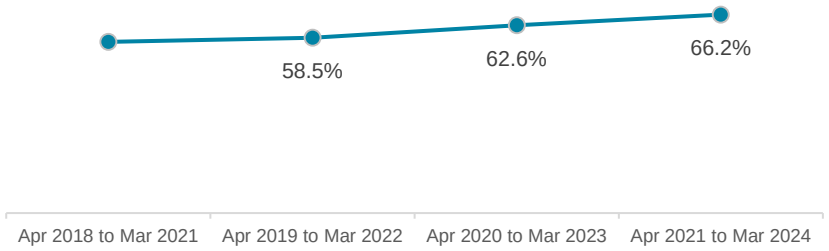
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Vacancy rate (percent of vacant positions across the Council)	Performance	16% (1,266 / 7,727) (End of Q3 2025/26)		**Same** by 0 percentage points compared with the end of Q2 2025/26 **Worse** by 8 percentage points compared with the end of Q2 2024/25	No benchmarking data is available
Percent of calls answered Kirklees Direct Call Centre*	Performance	82.8% (57,608 / 69,744) (Q3 2025/26)		**Same** by 0.0 percentage points compared with Q2 2025/26 **Better** by 3.5 percentage points compared with Q3 2024/25	No benchmarking data available
Percent of follow-up calls Kirklees Direct Call Centre*	Performance	11.6% (6,748 / 58,391) (Q3 2025/26)		**Better** by 1.5 percentage points compared with Q2 2025/26 **Better** by 1.7 percentage points compared with Q3 2024/25	No benchmarking data 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.

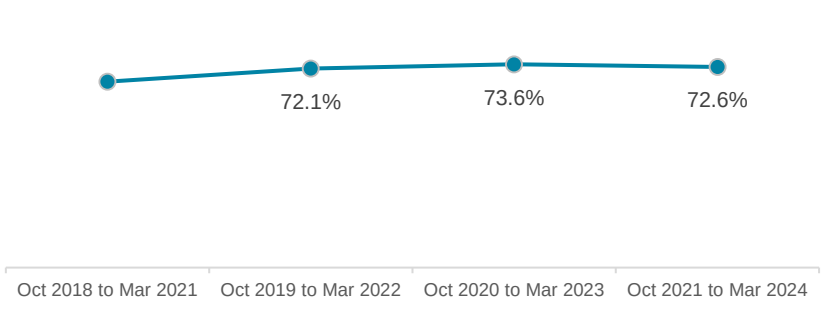
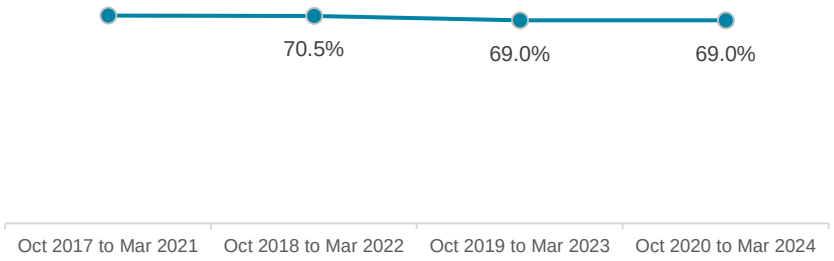
Public Health & Health Protection Measures

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Breastfeeding initiation rates (proportion of babies whose first feed included breastmilk)*	Performance	70.1% (616 / 879) (Q2 2025/26)		**Worse** by 0.4 percentage points compared with Q1 2025/26 **Worse** by 1.9 percentage points compared with Q2 2024/25	Kirklees – 70.3% National – 73.1% Breastfeeding rates (Q2 2025/26)
Percentage of people taking up an NHS Health Check invite*	Performance	33% (2,000 / 6,061) (Q2 2025/26)		**Better** by 6 percentage points compared with Q1 2025/26 **Better** by 2 percentage points compared with Q2 2024/25	Kirklees - 33% National - 34% Percentage of people taking up an NHS Health Check invite (Q2 2025/26)
Suicide rate per 100,000 population**	Performance	11.6 (2022-24)		**Better** by 0.6 suicides per 100,000 population compared with 2021-23 **Better** by 0.3 suicides per 100,000 population compared with 2020-22	Kirklees – 11.6 National - 10.6 Suicide rate (persons) (January 2022 to December 2024)

*Trend data comes from local NHS Trust maternity datasets; benchmark data comes from nationally reported data; Q3 2025/26 data not available yet
**Annually collected measure, no updated data for quarter 3 2025/26

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of children who are overweight/obese in Year 6*	Performance	37.6% (1,945 / 5,173) (2024/25)		**Worse** by 0.1 percentage points compared with 2023/24 **Same** by 0.0 percentage points compared with 2022/23	Kirklees - 37.6% National – 36.2% (School year 2024/25)
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 – Mar 2024)		**Better** by 3.6 percentage points compared with Apr 2020 – Mar 2023 **Better** by 7.7 percentage points compared with Apr 2019 – Mar 2022	Kirklees – 66.2% National – 69.9% (Apr 2021 – Mar 2024)

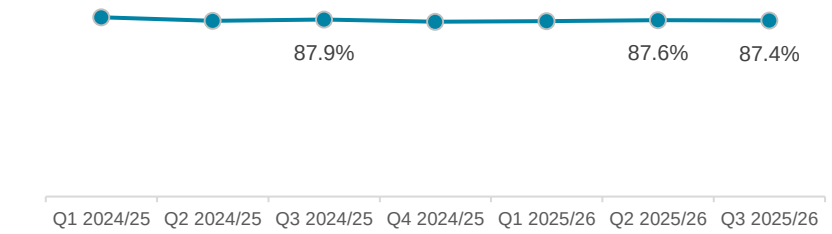
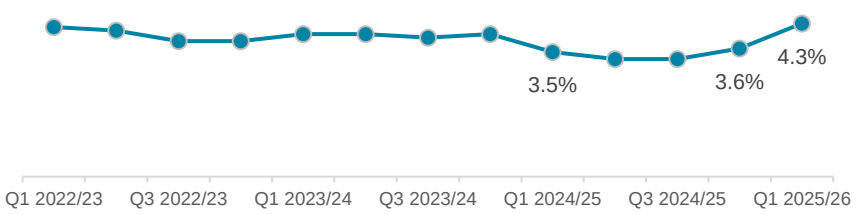
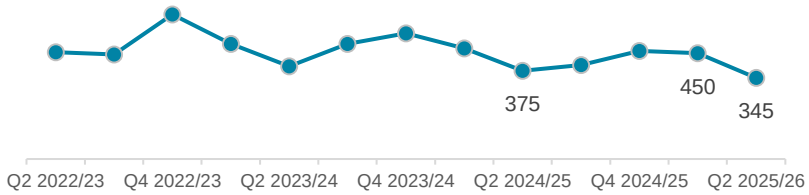
*Annually collected measure, no updated data for quarter 3 2025/26

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Cancer screening coverage: bowel cancer*	Performance	72.6% (48,865 / 67,280) (Oct 2021 – Mar 2024)		**Worse** by 1.0 percentage points compared with Oct 2020 – Mar 2023 **Better** by 0.5 percentage points compared with Oct 2019 – Mar 2022	Kirklees – 72.6% National – 71.8% (Oct 2021 – Mar 2024)
Cancer screening coverage: cervical cancer (aged 25-49)*	Performance	69% (52,105 / 75,550 (Oct 2020 – Mar 2024)		**Same** by 0.0 percentage points compared with Oct 2019 – Mar 2023 **Worse** by 1.5 percentage points compared with Oct 2018 – Mar 2022	Kirklees – 69% National – 67.5% (Oct 2020 – Mar 2024)

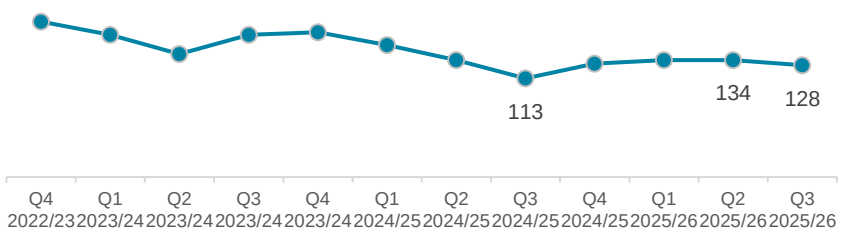
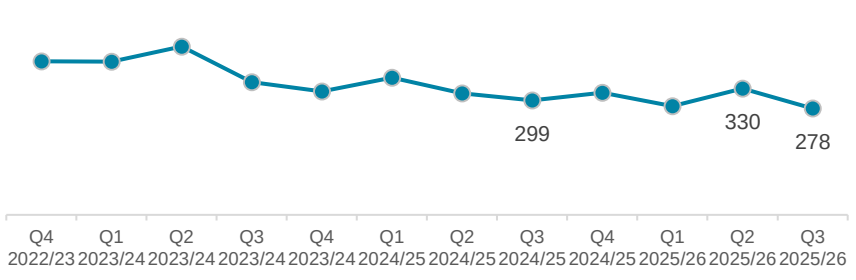
*Annually collected measure, no updated data for quarter 3 2025/26

Place

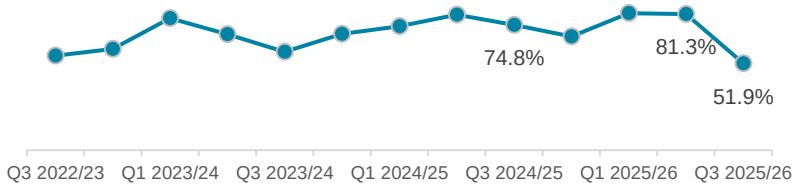
Skills & Regeneration Measures

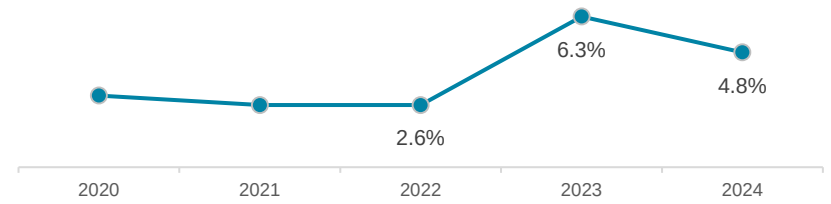
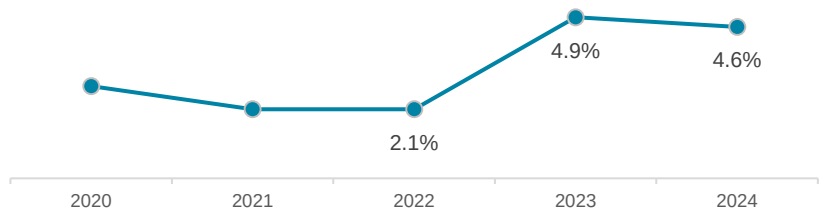
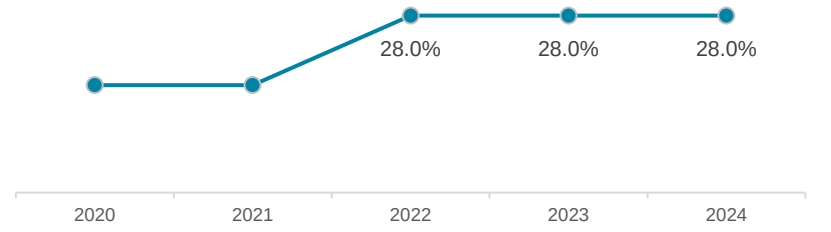
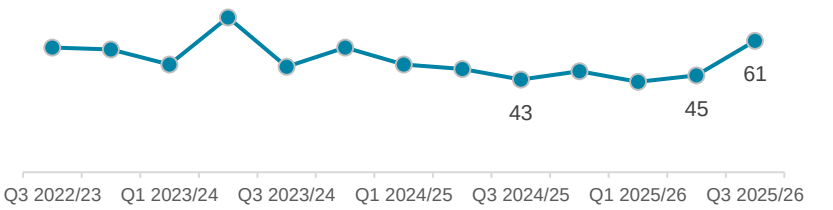
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Occupancy rate of council business centre units rented out (per square foot).	Performance	87.4% (147,125.66 sq ft / 168,252.46 sq ft) (Q3 2025/26)		**Worse** by 0.17 percentage points compared with Q2 2025/26 **Worse** by 0.5 percentage points compared with Q3 2024/25	No benchmarking data is available this is a locally specified measure
Unemployment Rate*	Performance	4.3% (9,800 / 231,100) (Q1 2025/26)		**Worse** by 0.7 percentage points compared with Q4 2024/25 **Worse** by 0.8 percentage points compared with Q1 2024/25	Kirklees - 4.3% Yorkshire and the Humber - 4% (Jul 2024 – Jun 2025)
Business deaths**	Performance	345 (Q2 2025/26)		**Better** by 105 businesses compared with Q1 2025/26 **Better** by 30 businesses compared with Q2 2024/25	Kirklees – 9.9 West Yorkshire – 10.2 Business deaths per 10,000 people aged 16+ (Jul–Sep 25)

*Data taken from national dataset so there is a 6-month lag, most up to date data available is for the period Jul 24 to Jun 2025
**Data taken from national datasets, there is a 3-month lag, most up to date data available is for Apr to Jun 2025

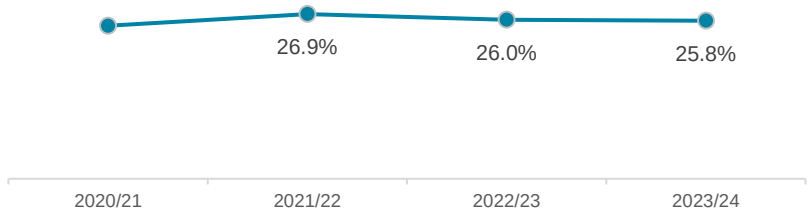
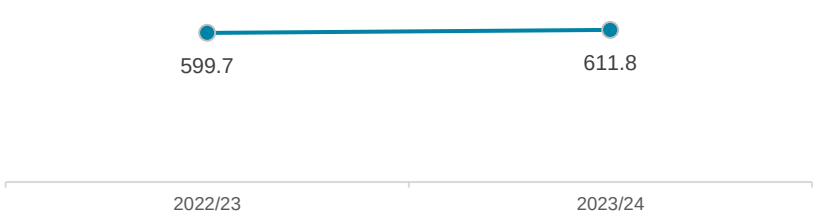
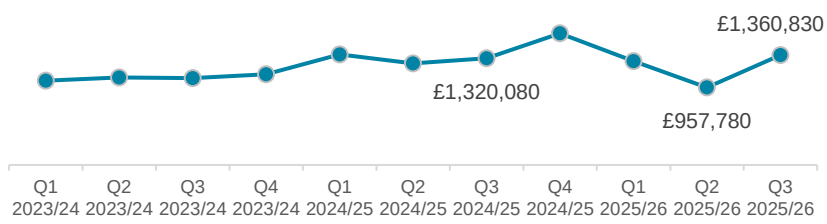
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of planning applications received - minor	Demand	128 (Q3 2025/26)		**Decrease** by 6 applications compared with Q2 2025/26 **Increase** by 15 applications compared with Q3 2024/25	Kirklees - 2.9 Yorkshire and the Humber - 2.7 Number of minor planning application decisions per 1,000 properties (Apr 24 – Mar 25)
Number of planning applications received - other	Demand	278 (Q3 2025/26)		**Decrease** by 52 applications compared with Q2 2025/26 **Decrease** by 21 applications compared with Q3 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	51.9% (435 / 838) (Q3 2025/26)		**Worse** by 29.4 percentage points compared with Q2 2025/26 **Worse** by 22.9 percentage points compared with Q3 2024/25	No benchmarking data is available

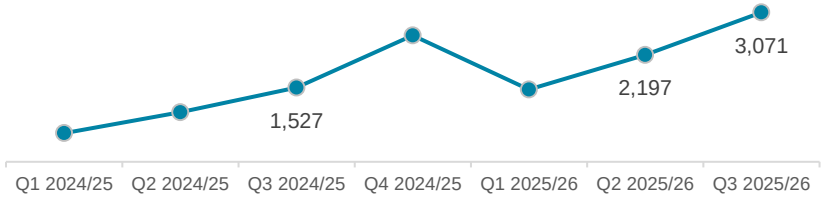
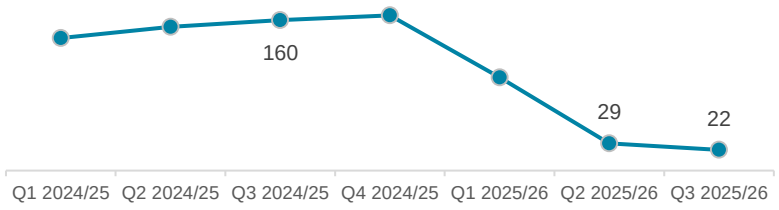
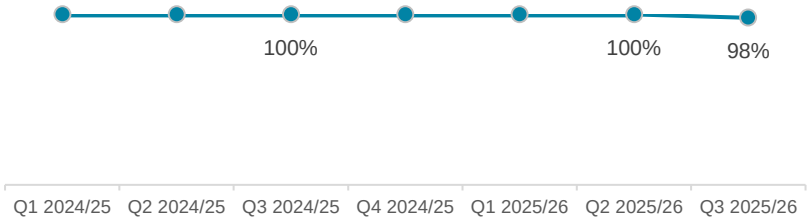
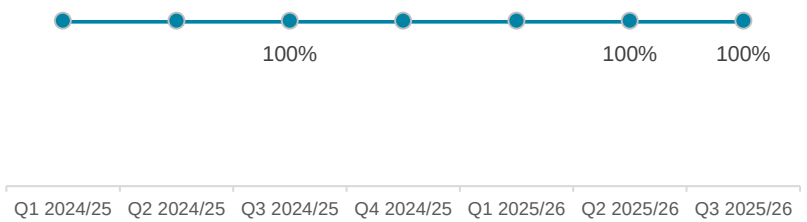
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
% of B and C roads that should be considered for maintenance (categorised as red and may need maintenance)*	Performance	4.8% (2024)		**Better** by 1.5 percentage points compared with 2023 **Worse** by 2.2 percentage points compared 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	28% (2024)		**Same** by 0 percentage points compared with 2023 **Same** by 0 percentage points compared with 2022	Kirklees - 28% Yorkshire and the Humber - 17% (2024)
People killed or seriously injured in road traffic accidents	Performance	61 (Q3 2025/26)		**Worse** by 16 accidents compared with Q2 2025/26 **Worse** by 18 accidents compared with Q3 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)

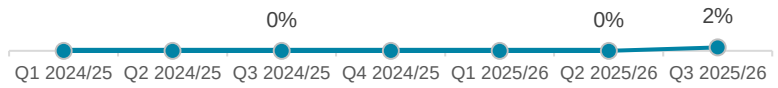
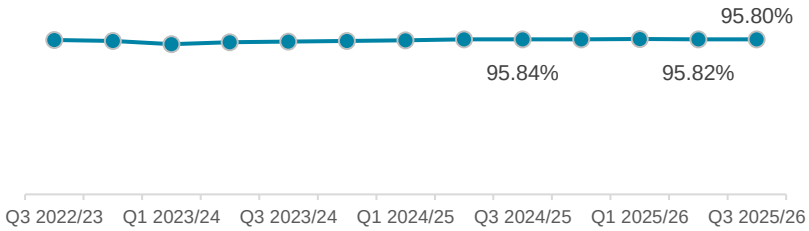
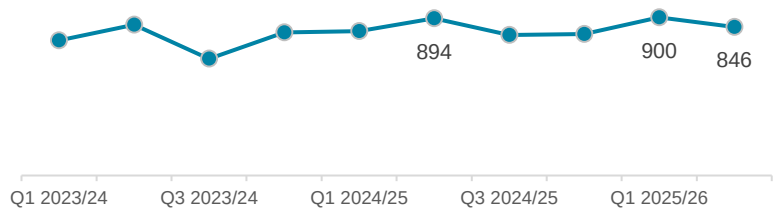
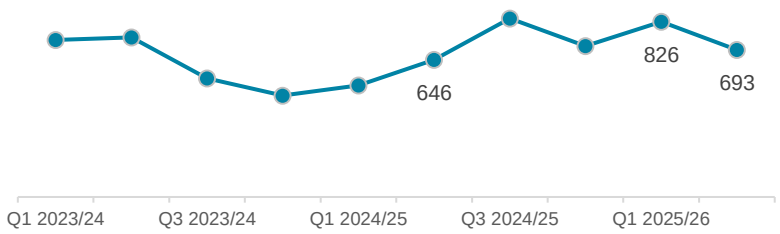
*Annually collected measures, there is a 12 month lag in data reporting

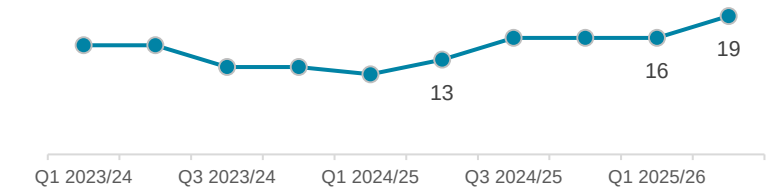
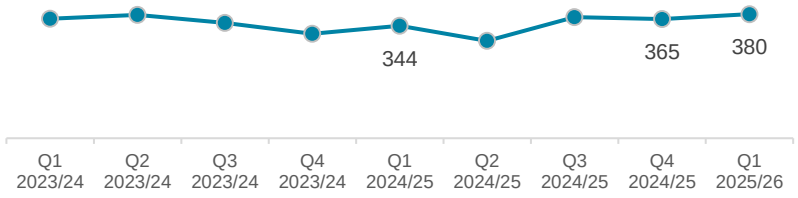
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of household waste sent for reuse, recycling or composting (Ex NI192)*	Performance	25.8% (41,042 / 158,826) (2023/24)		**Worse** by 0.2 percentage points compared with 2022/23 **Worse** by 1.1 percentage points compared 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 No comparison data available for 2021/22	Kirklees - 611.8 Bradford - 593.2 Calderdale - 489.9 Leeds - 530.5 Wakefield - 482.9 (2023/24)
Parking income.	Performance	£1,360,830 (Q3 2025/26)		**Better** by £403,050 compared with Q2 2025/26 **Better** by £40,750 compared with Q3 2024/25	No benchmarking data is available

*Annually collected measures, most up to date data provided for 2023/24

Homes & Neighbourhoods Measures

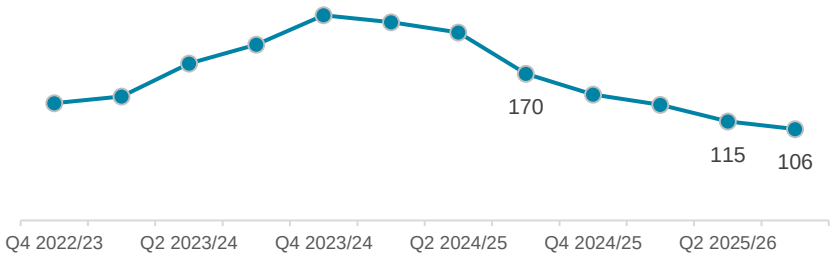
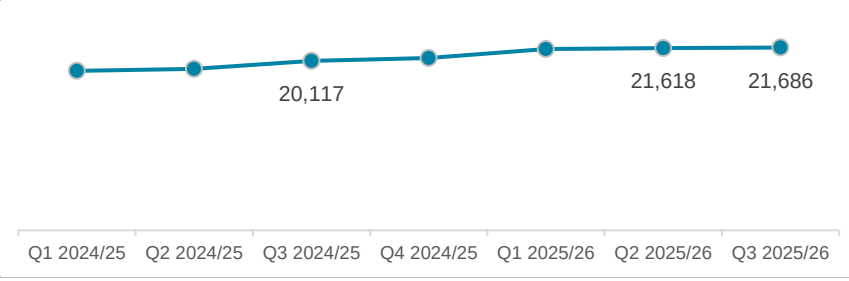
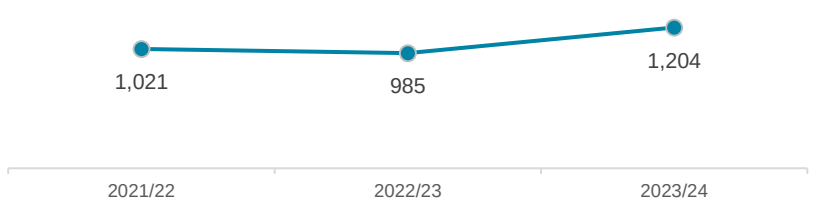
Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of closed damp, mould and condensation cases	Demand	3,071 (Q3 2025/26)		**Increase** by 874 cases compared with Q2 2025/26 **Increase** by ,1544 cases compared with Q3 2024/25	No benchmarking data is available
Average length of open damp, mould and condensation cases (in days)	Performance	22 (Q3 2025/26)		**Better** by 7 cases compared with Q2 2025/26 **Better** by 138 cases compared with Q3 2024/25	No benchmarking data is available
Proportion of homes for which all required fire risk assessments have been carried out.	Performance	98% (856 / 876) (Q3 2025/26)		**Worse** by 2 percentage points compared with Q2 2025/26 **Worse** by 2 percentage points compared with Q3 2024/25	No benchmarking data is available
Percent of Fire risk assessments carried that were due to be carried out.	Performance	100% (876 / 876) (Q3 2025/26)		**Same** by 0 percentage points compared with Q2 2025/26 **Same** by 0 percentage points compared with Q3 2024/25	No benchmarking data is available

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Percentage of fire risk assessments reported to the regulator that are outstanding.	Performance	2% (20 / 876) (Q3 2025/26)		**Worse** by 2 percentage points compared with Q2 2025/26 **Worse** by 2 percentage points compared with Q3 2024/25	No benchmarking data is available
Proportion of emergency responsive repairs completed within timescale.	Performance	95.80% (20,756 / 21,672) (Q3 2025/26)		**Worse** by 0.02 percentage points compared with Q2 2025/26 **Worse** by 0.04 percentage points compared with Q3 2024/25	No benchmarking data is available
Number of disabled facilities grants (DFG) adaptations referrals	Demand	846 (Q2 2025/26)		**Decrease** by 54 referrals compared with Q1 2025/26 **Decrease** by 48 referrals compared with Q2 2024/25	No benchmarking data is available
Number of households on the disabled facilities grants (DFG) adaptations waiting list	Demand	693 (Q2 2025/26)		**Decrease** by 133 households compared with Q1 2025/26 **Increase** by 47 households compared with Q2 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	19 (Q2 2025/26)		**Worse** by 3 weeks compared with Q1 2025/26 **Worse** by 6 weeks compared with Q2 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

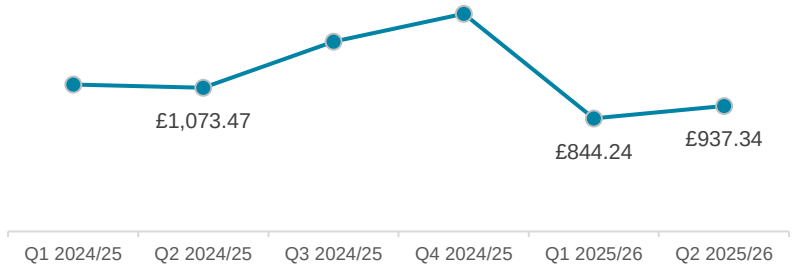
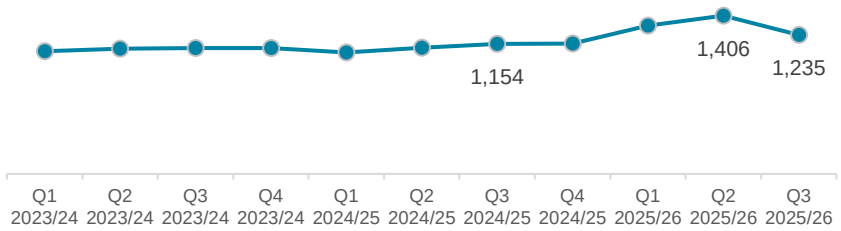
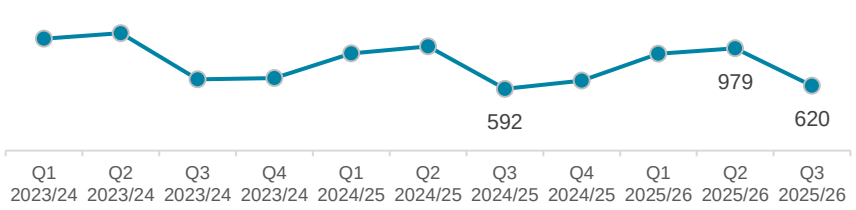
*Most up to date data available at time of producing the report

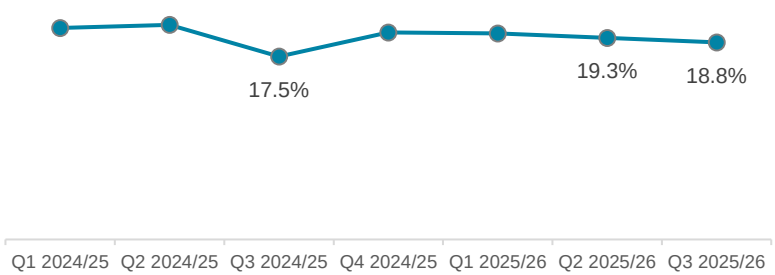
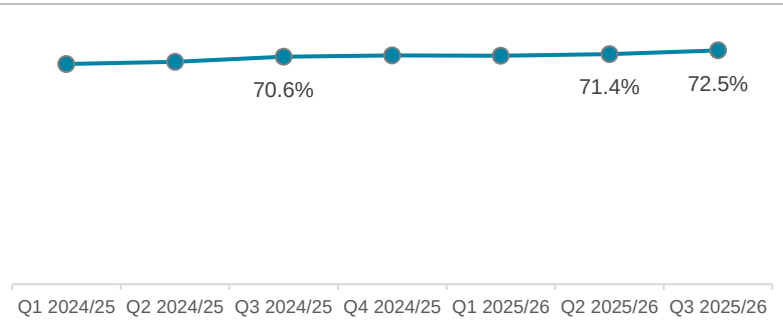
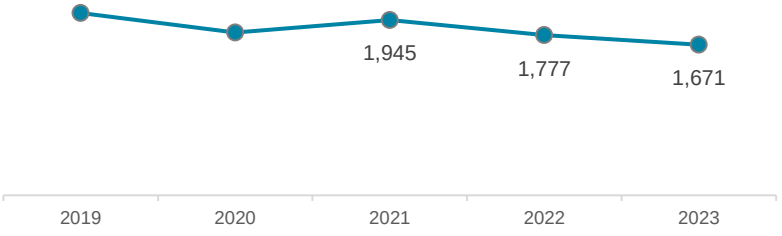
Development Measures

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Number of households in B&B temporary accommodation.	Demand	106 (Q3 2025/26)		**Decrease** by 9 households compared with Q2 2025/26 **Decrease** by 64 households compared with Q3 2024/25	Kirklees - 32.7% Yorkshire and the Humber - 27% % of households in B&B temporary accommodation (Q1 2025/26)
Number of applicants on Housing Register	Demand	21,686 (Q3 2025/26)		**Increase** by 68 applications compared with Q2 2025/26 **Increase** by 1,569 applications compared with Q3 2024/25	No benchmarking data is available
Total Market Homes Delivered*	Performance	1,204 (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

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	£937 (Q2 2025/26)		**Worse** by £93 per child within the quarter compared with Q1 2025/26 **Better** by £136 per child within the quarter compared with Q2 2024/25	DfT are looking at collecting data nationally next year
Number of Hackney carriage and private hire licenses	Demand	1,235 (Q3 2025/26)		**Decrease** by 171 licenses compared with Q2 2025/26 **Increase** by 81 licenses compared with Q3 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)
Number of noise pollution complaints	Demand	620 (Q3 2025/26)		**Decrease** by 359 complaints compared with Q2 2025/26 **Increase** by 28 complaints compared with Q3 2024/25	⬢ Kirklees – 8.2 Yorkshire and the Humber – 8.1 Rate of complaints about noise per 1,000 population (2020/21)

Measure	Measure Type	Latest value	Trend	Latest value comparison	Benchmark
Food hygiene percent of premises rated 4 stars	Performance	18.8% (676 / 3,594) (End of Q3 2025/26)		**Worse** by 0.5 percentage points compared with the end of Q2 2025/26 **Better** by 1.3 percentage points compared with the end of Q3 2024/25	No benchmarking data is available
Food hygiene percent of premises rated 5 stars	Performance	72.5% (2,607 / 3,595) (End of Q3 2025/26)		**Better** by 1.1 percentage points compared with the end of Q2 2025/26 **Better** by 1.9 percentage points compared with the end of Q3 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	1,671 (2023)		**Better** by 106 KT CO2e compared with 2022 **Better** by 274 KT CO2e compared with 2021	Kirklees – 1,671 Bradford – 1,876 Calderdale – 939.4 Wakefield – 1,770.4 Leeds – 3,551.1 CO2e emissions for the District (KT CO2e) (2023)

*Annually collected measure, most up to date data available

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REPORT TITLE: Corporate Risk Report, Quarter 3 2025-26

Meeting:	**Cabinet**
Date:	**24th March 2026**
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 3 2025-26	
Recommendations • That the report be noted • Executive Board to 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 10th February 2026 Yes 10th February 2026 Yes 10th February 2026

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 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 Q3 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 3 2025/26

Q3 Summary position:

Risks raised within the Corporate Risk Report remain stable this quarter, with one new risk escalated from the Children & Families Directorate Risk Register and no risks removed

- The new risk, CF03 Sufficiency of Children's Care (Risk of insufficient provision to meet the assessed needs of Looked After Children and Children in Need in local, appropriately supported placements leading to poor outcomes, budgetary implications, scrutiny from regulatory bodies and reputational damage), is scored as an Amber risk which reflects the challenges in securing and maintaining the required level and type of residential home and fostering provision

Increases in risk score:

- The risk score for Data processing and Access to information (previously Information Governance) has increased to a Red rated risk reflecting the continued pressure presented by the volume of Subject Access Requests that are being managed. The ICO are aware of the situation and are monitoring our performance in this area

Reductions in risk score:

- Quarter 3 has delivered reductions in risk scores across all 3 finance related risks (Budget Monitoring & Management, Medium Term Financial Sustainability and Capital Plan Management) this is a result of improvements in internal processes and controls, early engagement and communications to support 2026-27 Budget setting process and increasing certainty in external funding decisions including the Local Government Finance Settlement
- The score for Corporate Governance reduces - reflecting increased confidence in adherence to decision-making procedures, resulting from a targeted programme of training, communication and guidance for both senior Officers and Members
- The risk score for Contract Management has reduced to an Amber level. This reflects the progress that has been made in developing the Contract Management Framework, but acknowledging that there remains ongoing activity to embed new procedures within services, and to obtain assurance that procedures are being adhered to
- Housing Safety & Quality risk score has reduced as a result of the progress that has been made in addressing focus areas identified by the Regulator of Social Housing Regulatory Judgment, including compliance with recently introduced Awaab's Law
- The risk score for Homelessness & Temporary Accommodation has reduced to Amber reflecting the positive downward trend in usage of temporary accommodation options, including B&B
- Climate Change risk score has reduced back down to an Amber level as a period of significant resourcing challenges within the team begin to abate

Summary overview (page 1 of 2)

Reference	Risk Description	Transformation Priority	Risk Owner	Risk Score	Direction of travel
SI03	**Cyber security**		Terence Hudson	16	⇨
CF02	**EHCPs, SEND compliance & financial impact**	✓	Jo-Anne Sanders	16	⇨
LGC02	**Data processing & access to information**		Samantha Lawton	15	⇧
FIN02	**Medium term financial sustainability**		Kevin Mulvaney	12	⇩
PS01	**Organisational resourcing**		Shauna Coyle	12	⇨
SI01	**Data integrity**		Mike Henry	12	⇨
LGC04	**Contract management**	✓	Samantha Lawton	12	⇩
CAS01	**Community cohesion, wellbeing & resilience**		Jill Greenfield	12	⇨
DEV02	**Homelessness and temporary accommodation**	✓	Joanne Bartholomew	12	⇩
DEV03	**Economic growth & resilience**		David Shepherd	12	⇨
HN01	**Housing safety & quality**	✓	Phil Jones	12	⇩
ECC01	**Climate change**		Kat Armitage	12	⇩

Summary overview (page 2 of 2)

Reference	Risk Description	Transformation Priority	Risk Owner	Risk Score	Direction of travel
CF03	**Sufficiency of children's care**		Vicky Metheringham	9	NEW
FIN01	**Budget monitoring and management**		Kevin Mulvaney	9	⇩
FIN03	**Capital plan management**		Kevin Mulvaney	9	⇩
DEV01	**Corporate assets portfolio management**	✓	Joanne Bartholomew	9	⇨
PS02	**Potential for industrial action**		Shauna Coyle	9	⇨
LGC01	**Failure in corporate governance**		Samantha Lawton	8	⇩
HP01	**Emergency planning & business continuity**		Jane O'Donnell	8	⇨
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	⇨
SI02	**Relationships with key partners**		Stephen Bonnell	6	⇨

Kirklees COUNCIL

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

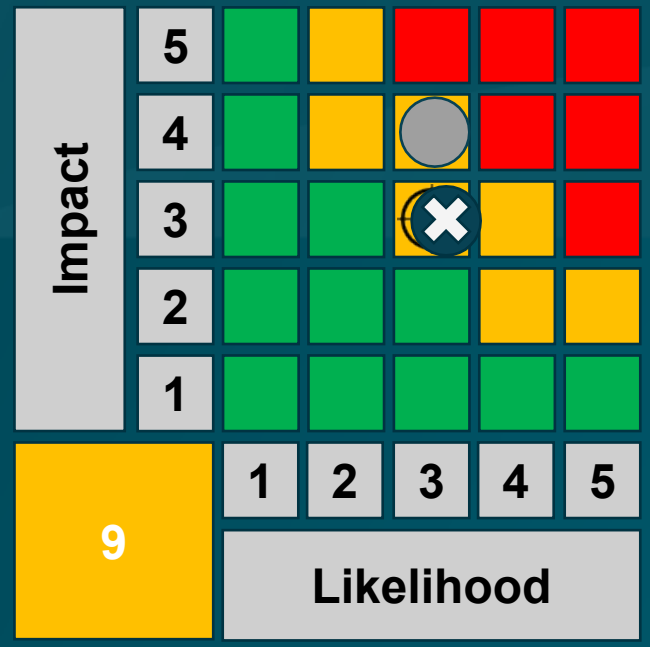
Quarterly update:

- The risk score has reduced in Q3 and is now at the target level, reflecting the improved budgetary control environment and demonstrated by the reduction projected outturn of (£3.1m) at Q3 (vs (£5.1m) at Q2) but noting this remains an overspend
- Continued focus to ensure effective governance and clear accountability is in place to maintain ongoing monitoring of the budget position and ensure required actions are progressed at pace
- 2025-26 savings targets continue to be implemented and monitored as part of monthly reporting to ELT, where slippage occurs in operational delivery savings have been rolled over as part of 2026-27 budget setting process
- There remains volatility in social care demand budgets, which is being closely monitored

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, now includes payroll monitoring
5. Check & Challenge approach in place led by Chief Executive & CFO
6. People Panel in place to review all recruitment
7. Regular review of reserves and other balances with appropriate action where no longer required / not utilised

Further actions underway:

1. Draft 2026-27 budget book was produced and published in November 2025 to ensure continuation of improved control environment into new financial year
2. Further improve budget management through more detailed monitoring of staffing expenditure, including the linking of expenditure to staff structure on SAP
3. Progress simplification agenda through reduction in the number of cost centres and ledger codes, to commence in 2026-27
4. Further refinement of capital plan which increases certainty of impacts on revenue financing costs

Kirklees COUNCIL

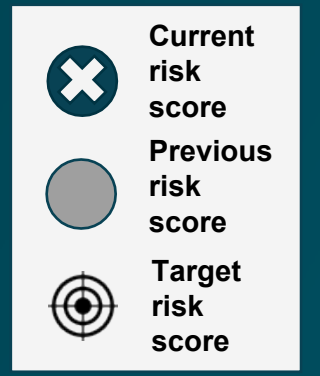
FIN02 Medium Term Financial Sustainability

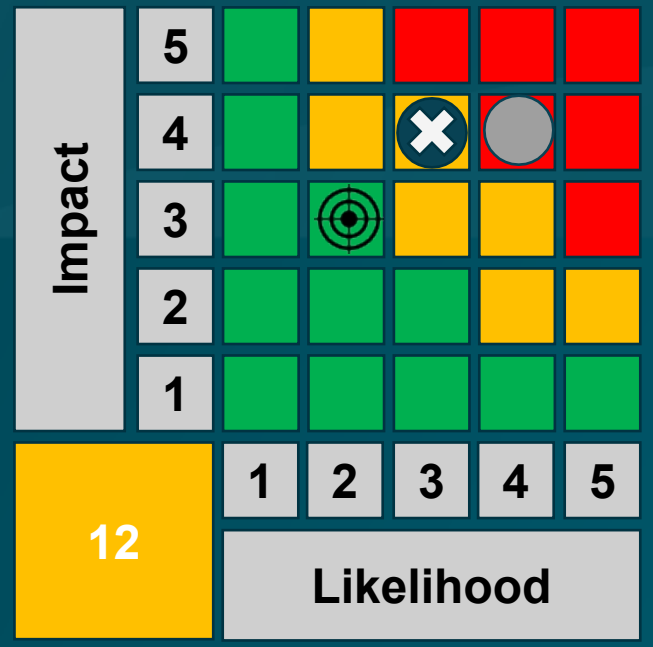
Risk of medium-long term financial instability caused by failure to adhere to robust financial planning processes and procedures, or taking the appropriate action, leading to requirement to implement changes in service provision, possible government intervention and consequential reputational damage.

Risk Owner: Kevin Mulvaney, Service Director Finance

Quarterly update:

- Risk score reduced reflecting greater stability in the council budget position and increased certainty on funding
- The Local Government Finance Settlement has been published which is favourable to Kirklees and provides funding certainty for 3 years. The settlement is materially better than assumptions within the MTFS published in September 2025 with budget gap reduced from £56m to <£30m
- Emerging clarity on process for removal of the of the Dedicated Schools Grant (DSG) statutory override and treatment of accrued DSG deficits
- General fund reserves increased by £20m over the next 5 years providing greater resilience
- Additional £40m to cover budget pressures has been included within 2026-27 budget





Controls in operation:

1. Annual update of the Medium-Term Financial Plan completed in September 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 of 2024/25 accounts completed, unqualified opinion provided

Further actions underway:

1. Balanced budget proposals submitted to Cabinet & Council in February with lowest savings targets for a number of years

2. Continued monitoring of SEND position. Safety Valve Agreement has been extended and will now end in 2029-30, statutory override runs to 2027-28. Awaiting publication of the delayed Schools White Paper.

3. Final settlement to be reviewed when published in February to consider any further impacts on budget

Kirklees COUNCIL

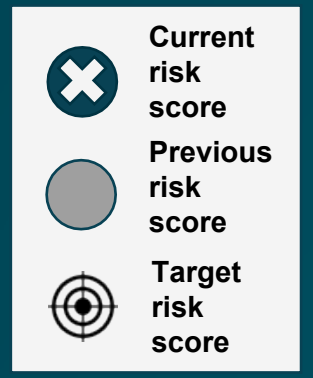
FIN03 Capital Plan Management

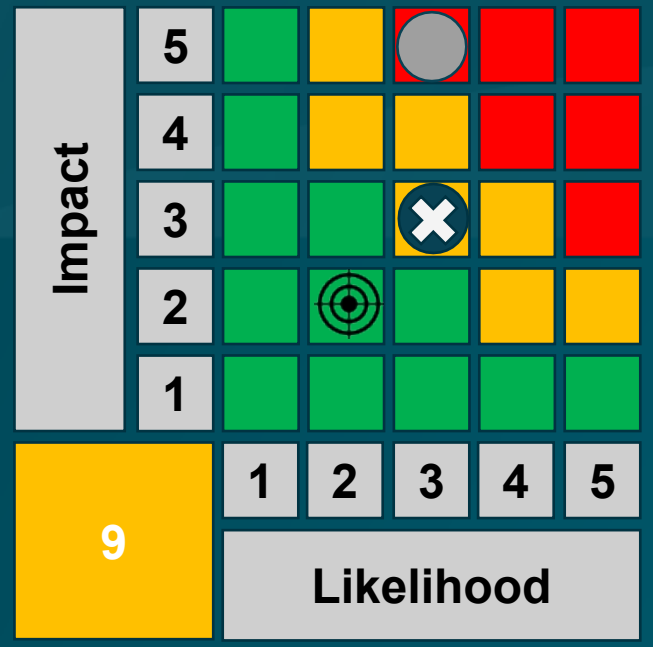
Risk that the agreed capital plan becomes unaffordable based on the ongoing revenue resources available to the council with implications for reserve levels and delivery of wider services and statutory responsibilities.

Risk Owner: Kevin Mulvaney, Service Director Finance

Quarterly update:

- Reduction in score following the review, prioritisation and reprofiling of the capital plan for the December draft budget report
- Proposed capital plan is deemed affordable over the medium term
- Continued assessment of further capital investment recognising the need for any borrowing to be affordable over the medium – long term within overall resource envelope





Controls in operation:

1. Capital Assurance Board (CAB) meet monthly to provide strategic oversight of the Council's Capital Plan, chaired by Chief Finance Officer
2. 5-year Capital Plan developed and agreed, monitored through CAB
3. Detailed monitoring of Treasury Management budgets to assess ongoing affordability of the capital plan
4. Monitoring of asset disposals: Annual capital receipts targets agreed, and reported, at CAB
5. Business Cases required to gain authorisation of capital expenditure by CAB

Further actions underway:

1. Reassessment of baseline capital expenditure for 2026-27
2. CFO to set targets for % of revenue budget for capital financing (MRP + Interest) – need for restatement of previous comparative position for benchmarking
3. Review of capital governance across the Council to support timely delivery and improve accountability through improved capital monitoring to SLTs, ELT and Cabinet – priority action for 2026-27
4. Increased focus on phasing and forecasting of spend to improve accuracy remains a priority

Kirklees COUNCIL

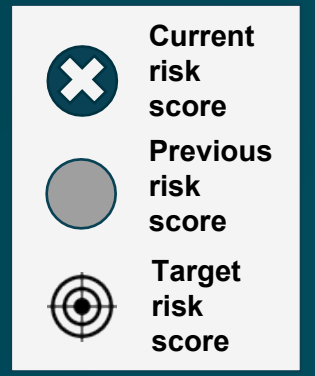
PS01 Organisational resourcing

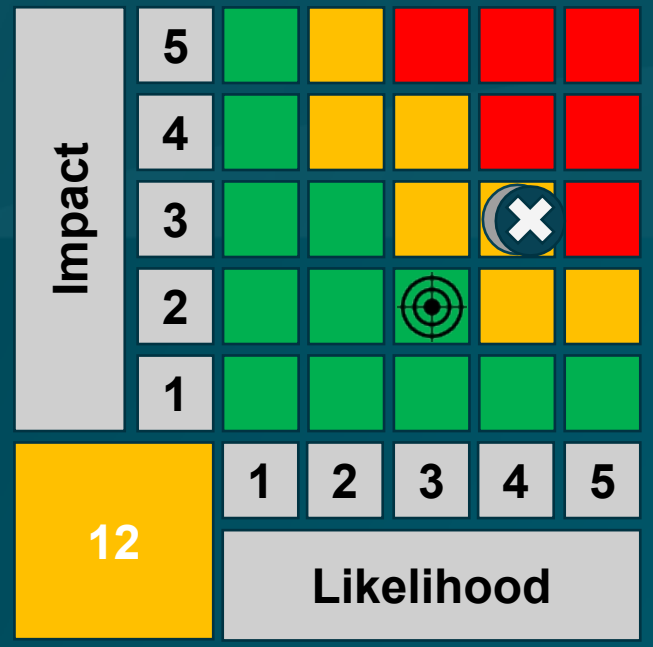
Risk that the council cannot meet its strategic objectives due to a failure to determine and provide for the future employee resourcing needs of the organisation and an inability to adapt and respond to shifts in the labour market leading to possible disruption to service delivery and increased staff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

Risk Owner: Shauna Coyle, Head of People Services

Quarterly update:

- Workforce planning reaching more areas with identified resourcing challenges, will support a less reactive approach
- Entry level apprenticeship recruitment taken place.
- Participation in LGA recruitment reset programme to ensure sector led best practice adopted
- Continued development of LinkedIn 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 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. Performance management and probation process ensuring under performance/absences are addressed in an appropriate and timely manner

Further actions underway:

1. Further development and embedding of workforce planning – piloting refreshed strategic workforce planning approach
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 organisational awareness of FTE performance metrics and consequential impacts of increase / reduction in FTE levels

Kirklees COUNCIL

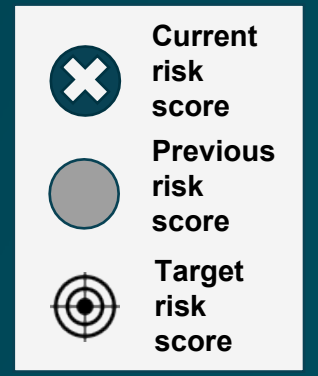
PS02 Industrial and disruptive action

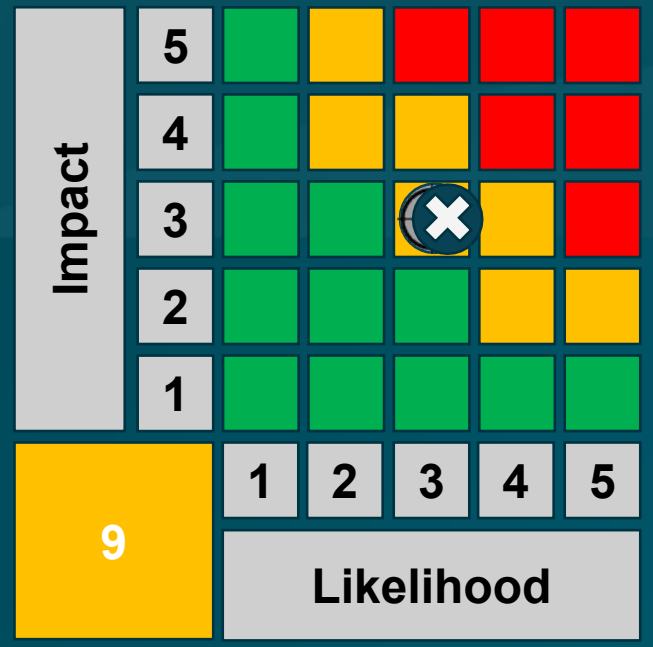
Risk that service delivery is impacted by prolonged industrial and disruptive action, triggered by service changes, budget reductions/pressures, asset rationalisation, changes to ways of working and any compulsory redundancies.

Risk Owner: Shauna Coyle, Head of People Services

Quarterly update:

- There continues to be complexity, and a high volume of employee relations matters and delays with tribunal cases
- Consultation underway for Schools Support Staff Negotiating Body (SSSNB) and Adult Social Care Fair Pay





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/HRM's
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. Action plan to implement legislative changes associated with the new Employment Rights Act in place
2. On going training of staff to cover legislation changes – Employment Rights Act update to be delivered in Q4
3. Reviewing and updating TU membership and facilities time
4. Actions are underway to understand and address Equal Pay emerging risk and potential consequences.

Kirklees COUNCIL

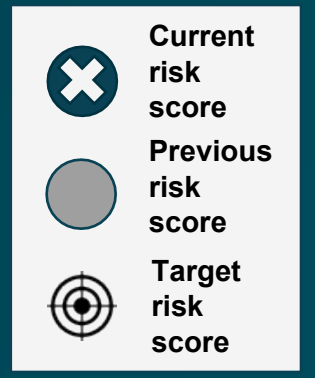
SI01 Data Integrity

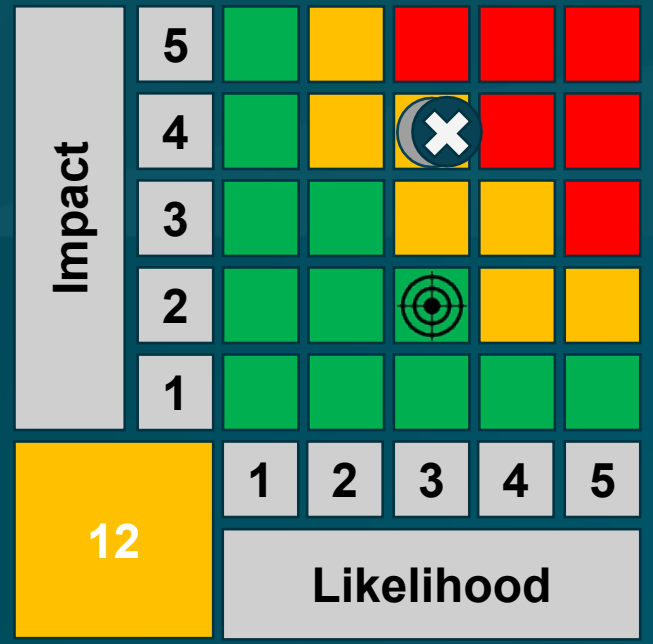
Risk that inaccurate, incomplete or inconsistent data leads to poor decision making resulting in misinformed strategies, operational inefficiencies, ineffective resource allocation, poor outcomes for citizens and failure to comply with statutory and regulatory requirements.

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

Quarterly update:

- The council is considering the findings from an externally commissioned digital review which included an assessment of the council's existing data governance and data management, plus the current capacity, skills and 'data' roles in comparison with those recommended for a local authority such as Kirklees. This will lead to actions in the coming months to address related risks and issues.
- Loss of key staff within the Data and Insight Service has reduced the level of support that can be provided to service areas with the identification of data management issues and associated remedial actions currently reactive only. Several recruitment activities are underway to find capacity to manage immediate priorities. Where current capacity leads to specific service impact risks these are/will be raised and managed.





Controls in operation:

1. Regular prioritisation of Data and Insight resources and activity to ensure they reflect council priority areas
2. Targeted interventions to improve the management and integrity of data are being applied on a case-by-case basis in high risk/profile areas
3. Information Asset Owners responsible for the integrity of their services data and provide a written judgement of the security and use of their assets annually
4. External Audit provides assurance of key financial data
5. Internal Audit validation of accuracy on UKSPF and WYCA grant funding submissions

Further actions underway:

1. The findings of the Digital Review are being considered for prioritisation and action, including in areas such as data governance and data management. These will form a key part of the council's Digital Transformation Programme in 2026/27 (and onwards).
2. Related actions will be key to implementing the council's new Digital Strategy, which is scheduled for sign off in Q4 2025/26.
3. Investment in tools and technology to improve the council's governance and management of data is being considered as a result of the above. The review has highlighted the importance of effective data management and potential opportunities for further practices and technologies to enable this.
4. Continued focus on raising awareness and improving knowledge of data governance and data management within services across the council
5. Focus on developing workforce skills and capability – 40+ staff completed or pursuing data apprenticeships (L3 – L6)

Kirklees COUNCIL

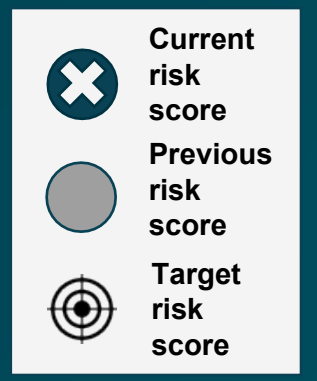
SI02 Relationships with key partners

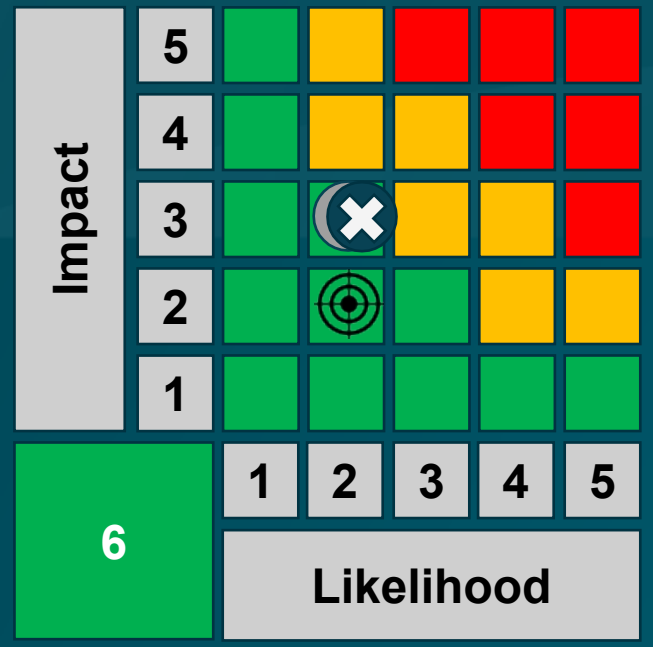
Risk of poor outcomes for Kirklees in terms of priority setting and funding allocations caused by failure to develop and maintain effective relationships with key regional and local partners and organisations, impacting on our ability to meet statutory and local requirements.

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

Quarterly update:

- Significant partnership engagement is still underway to refresh our 'partnership framework', which includes our borough vision, shared outcomes, and how we work together.
- Changes to the focus and funding of national health organisations are still underway at a fast pace, with a significant reduction in local capacity.
- Partnership working with WYCA is evolving ahead of an integrated funding settlement in April 2026. This includes adjustments to decision-making processes and committees in order to streamline decision-making.
- Coordination meetings with TSL (Third Sector Leaders) leadership continue and inform several action areas including identifying improvements to the way the council works with and supports the third sector.





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
9. Regular coordination meetings with Third Sector Leaders.

Further actions underway:

1. Refresh of our partnership framework, including our borough vision, shared outcomes, and how we work together
2. Work developing on improving partnership working at a West Yorkshire level. Bilateral conversations to address issues and opportunities relating to specific areas of collaboration. This includes with WYCA and other West Yorkshire local authorities
3. Building connections between teams to support broader relationships and connections, minimising the risk associated with individual relationships and points of contact
4. As part of the corporate peer challenge action plan, we will be reviewing existing business and economy engagement mechanisms to identify areas for improvements, and engaging with business and economic partners on the Inclusive Economy Strategy
5. Joint working with ICB colleagues on neighbourhood level collaboration across council services and local health services
6. Proposal of funding for voluntary and community capacity included in the council's proposed budget which will mitigate the impact of the end of UKSPF.

Kirklees COUNCIL

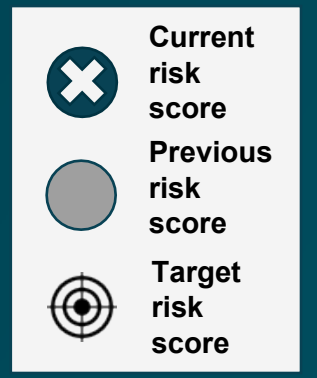
SI03 Cyber Security

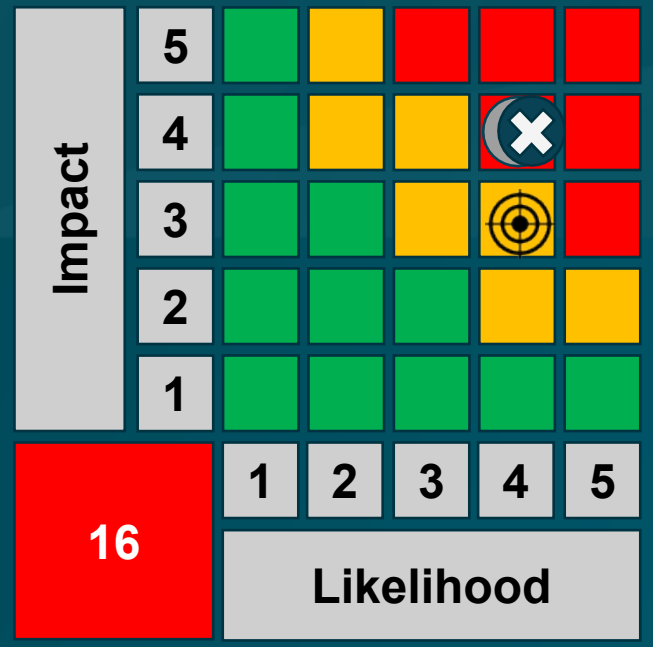
The risk of a data breach and / or impaired system functionality caused by a malicious cyber-attack leading to inability to deliver council services, costs to recover / compensate and associated reputational damage

Risk Owner: Terence Hudson, Head of Technology

Quarterly update:

- National update indicates threat levels remain and complexity of attacks increasing with use of AI
- Cyber Assessment Framework (CAF) implementation continues
- MHCLG will provide £100k funding to improve CAF measures in Q4
- Major incident plan will be updated following joint IT and Emergency Planning event
- Microsoft 365 E5 has been procured as of 1st January 2026 following approval of business case and governance process. Work will start with Microsoft partner in Q4 to start implementation of security pack
- PSN penetration testing is complete and remedial action plan produced to address risks.





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
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 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

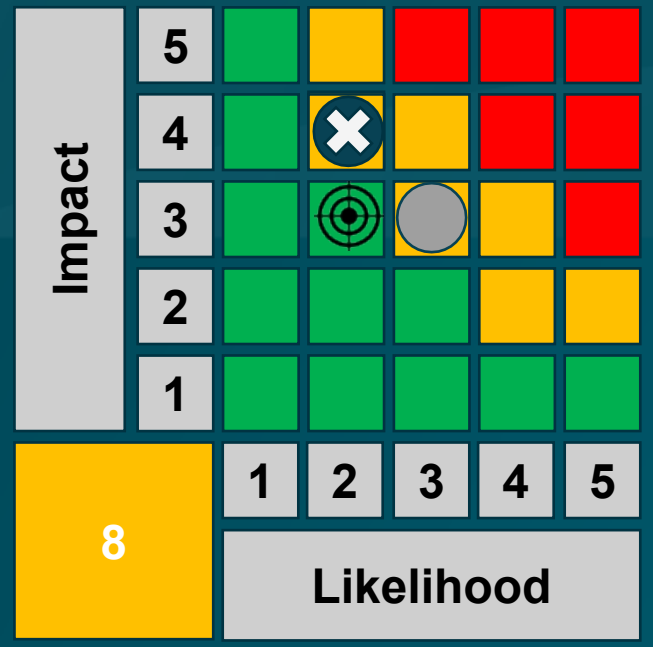
Quarterly update:

- Refreshed/additional guidance on decision making procedures in place. 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.
- Refreshed induction and Member development offer being developed to include training on open and transparent decision-making processes
- Planning for May 2026 full council elections is in progress

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Constitution (including Constitution Working Group)
2. Leader & Cabinet model with portfolio holders and scrutiny function
3. Code of Conduct for Members and Officers
4. Scheme of delegations approved to ensure effective delegated decision making and transparent recording
5. Report templates and detailed guidance
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
13. Code of Corporate Governance

Further actions underway:

1. Further consideration of updates to constitution to facilitate effective decision making overseen by the Constitution Working Group (CWG), which will continue during the current municipal year. CWG reports to Corporate Governance & Audit Committee and Council as part of the updating of the Constitution by the Monitoring Officer

2. KPI's have been developed to monitor and ensure statutory compliance with Local Authorities (Executive Arrangements, Meetings and Access to Information Regulations)

3. Cross Party Budget Working Group to re-convene

Kirklees COUNCIL

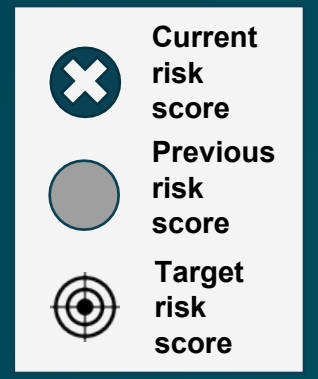
LGC02 Data Processing & Access to information

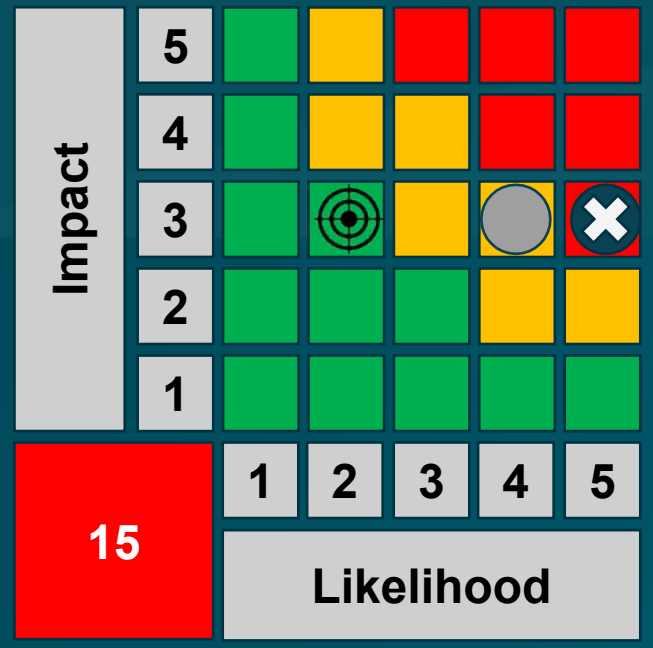
Failure to process (obtain, hold, record, use, share) information in line with the UK General Data Protection Regulations, Data Protection Act, Freedom of Information legislation and other relevant legislation leading to regulatory censure, fines, and associated reputational damage

Risk Owner: Samantha Lawton, Service Director Legal & Commissioning

Quarterly update:

- Risk score has increased reflecting the growing backlog of Subject Access Requests. The ICO recognise the challenges that we face and are monitoring the situation closely. Failure to resolve satisfactorily may result in formal reprimand or other action from the ICO
- FOI request numbers have reduced back to recent levels in Q3 (from a peak in Q2) but numbers continue to be inflated on previous years
- One data incident was reported to the ICO in Q3
- Continuing to fulfil the requirements of the data sharing audit action plan





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. A UK GDPR complaints process has been developed and expected publication is in Q4 2025/26
2. Review of IG Team ways of working to address SARs backlog continues, including development of a business case to implement a technical solution to support with SARs management
3. Further review of resources within the IG team is being considered to ensure it can meet demand and address backlog issues
4. Work continues on the 2025/2026 DSPT submission (due by 30 June 2026)

Kirklees COUNCIL

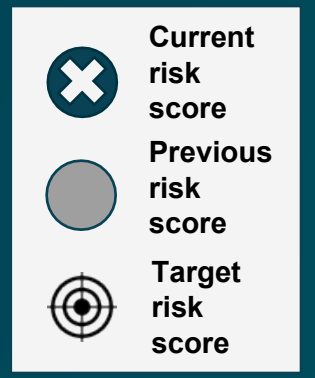
LGC03 Procurement

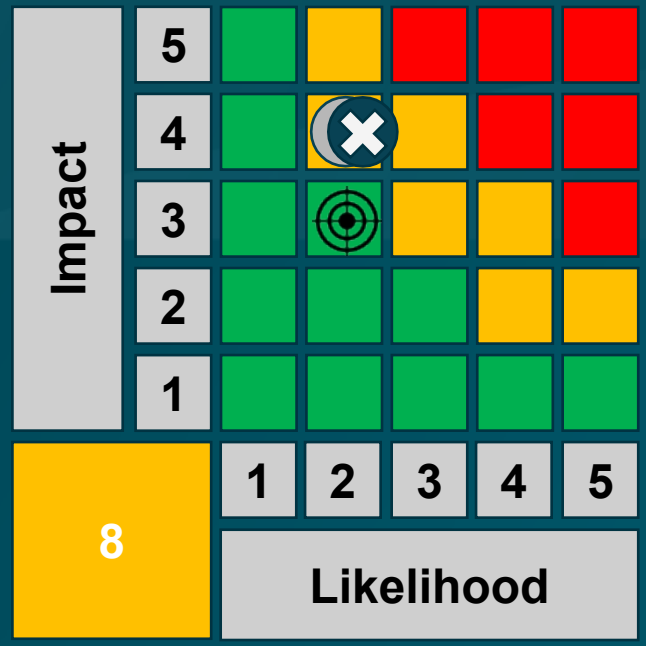
Risk that the council enters into contracts with suppliers / commissioned service providers that do not secure the intended outcomes, due to inadequate or non-adherence to processes and procedures resulting in increased costs, reduced benefits and possible statutory breaches and reputational damage.

Risk Owner: Samantha Lawton, Service Director Legal & Commissioning

Quarterly update:

- The risk score remains unchanged this quarter, reflecting ongoing stability in this area.
- Guidance for buyers is available on the Procurement intranet page, outlining the key elements of the procurement process.
- The refreshed 2025 Procurement Strategy has now been published.
- Work is progressing on a procurement eLearning module for the MyLearning Portal, which should be ready to launch alongside the updated CPRs in Q1 2026/27.
- The service continues to support the delivery of Our Council Priorities through a category management approach, ensuring procurement activity is strategically planned, properly resourced and focused on achieving 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 Category trackers
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. Development of e-learning training modules for staff involved in procurement activities to raise awareness and upskill across the procurement lifecycle
2. Working with Data & Insight to identify instances of off-contract spend and develop controls to prevent reoccurrence
3. Continued vigilance of the external market to understand new trends and emerging risks due to process changes triggered by the Procurement Act

Kirklees COUNCIL

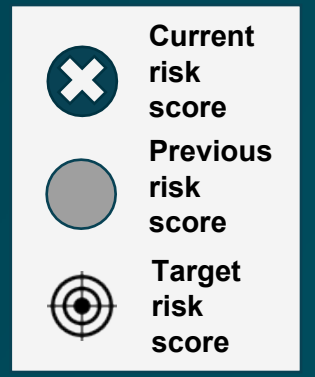
LGC04 Contract Management

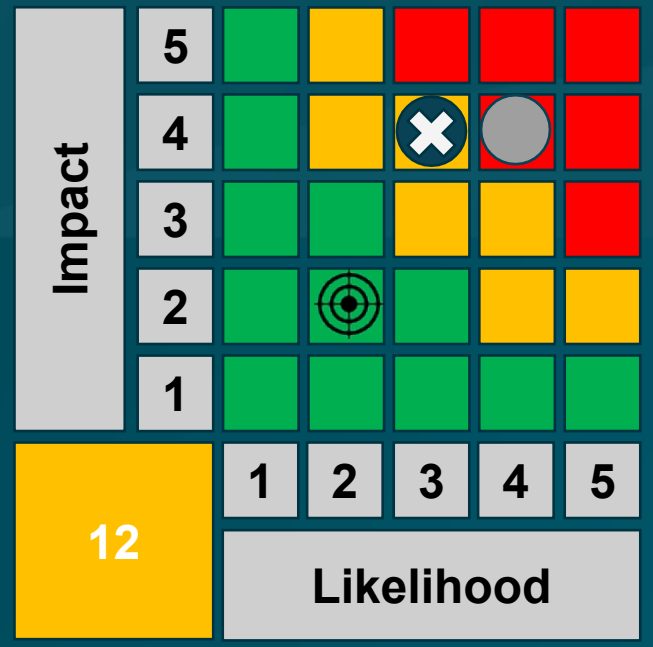
Risk that suppliers do not provide goods / services in line with contractual agreements and / or a failure to identify, control and manage risks arising through supplier / contractor activity due to lack of robust oversight and quality assurance arrangements.

Risk Owner: Samantha Lawton, Service Director Legal & Commissioning

Quarterly update:

- The likelihood of this risk occurring has reduced slightly this quarter due to the completion of the first stage of the Contract Management Review, supported by the Transformation Team.
- Updated Contract Management Framework is now published, offering templates and guidance for Contract Managers.
- An introductory training module is now available on MyLearning and has been promoted through the intranet and SLT meetings.
- Work is underway to develop a contract dashboard to provide more visibility of contracts in place to SLTs which should be in place during Q4.





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. Contract management framework and guidance documents published on intranet to promote a consistent approach across the organisation.
4. Contract management e-learning module available for all contract managers to access on the MyLearning portal.
5. KPIs / outcome measures / specifications that will be used to monitor performance are agreed precontract completion and defined within contractual documentation
6. 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
7. Dedicated resource is in place within some Directorates which provide guidance, consistency and rigour in approach

Further actions underway:

1. Implement a Contracts Dashboard to support regular review within services and provide assurance / identify issues across all active contracts
2. Increased focus on robustness of processes for performance monitoring e.g. source of performance data, frequency, timeline to recover, penalties for non delivery
3. Monitor use of e-learning module on contract management to ensure take up from contract managers and exploiting opportunities available through the Government Commercial College
4. Communications programme to raise awareness of requirements under the new contract management framework and training opportunities available to support
5. 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

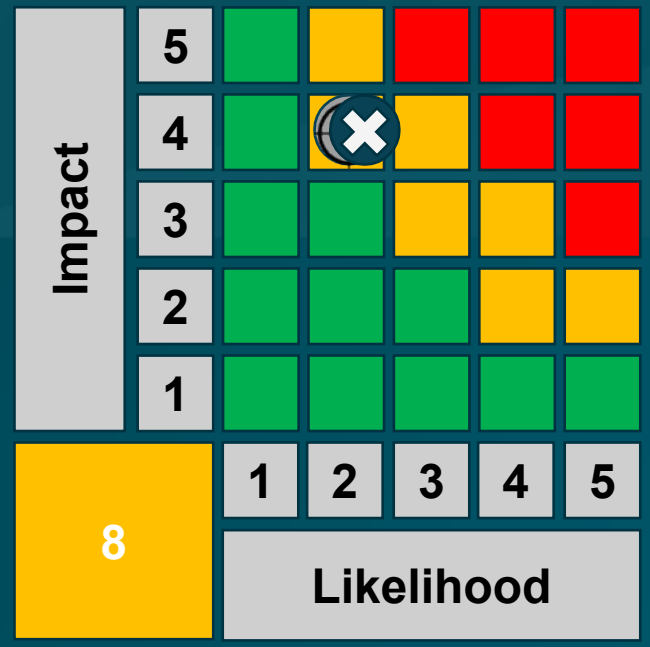
Quarterly update:

- NHS re-organisation with focus on Emergency Preparedness, Resilience & Response (EPRR) discussed at Kirklees Health Protection Board and will be monitored until clarity/assurances received.
- The annual report for the multi agency Protect and Prepare Group, was presented to Gold CONTEST during Q3
- Participated in the additional days for national Exercise Pegasus.
- Workshops delivered in preparation for Martyn's Law with internal and external attendees

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Embedded emergency management system that aligns to national guidance
2. Readiness and competencies are monitored through completion annually of the NHS EPRR self-assessment audit, outcome is submitted to the ICB
3. Governance through Kirklees Health Protection Board and Local Resilience Forum, collaborative working and information sharing with key stakeholders
4. West Yorkshire Resilience Forum Community Risk Register
5. Business Continuity Resilience 'pulse check' completed on a monthly basis by all Services, submissions reviewed and actions allocated if required
6. Review and testing of Service level Business Continuity Plans is monitored with training and support provided to Services where data indicates issues
7. Major Incident Plan and associated appendices in place with rolling work programme in place to ensure content and contacts remain up to date
8. Personal Security Maturity Assessment completed for the organisation

Further actions underway:

1. Programme of activity to embed security procedures for corporate assets and regular communications to maintain awareness. Prevent and ACT training now added to compliance learning suite
2. Continue to monitor the NHS reorganisation on Kirklees and ensure governance structures prepare for and reflect revised organisational structure
3. Review of Safety Advisory Group (SAG) triaging process for events in Kirklees to ensure the correct events are escalated for consideration by SAG
4. Martyn's Law comes into force in April 2027. Engagement with sites (including commercial, community and council owned) across Kirklees that will be impacted

Kirklees COUNCIL

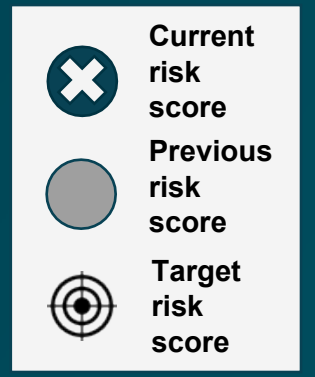
HP02 Health & Safety

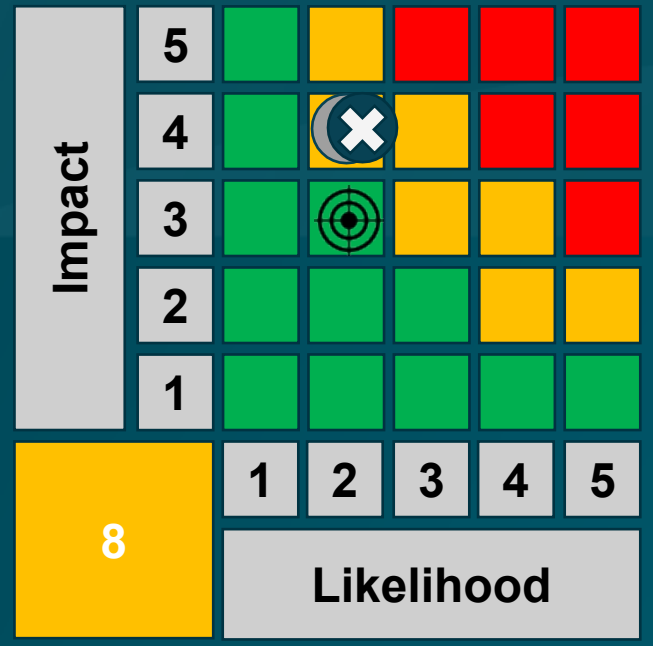
Failure to provide appropriate framework, guidance and monitoring of corporate H&S statutory requirements results in a preventable H&S incident involving colleagues and / or members of the public with possible financial, legal and reputational impacts

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

Quarterly update:

- 70% target for H&S Awareness training, part of the suite of Compliance Learning, agreed at H&S Oversight Board.
- Grey Fleet H&S guidance note issued.
- New Headteacher H&S induction completed.
- IOSH for Senior Executives training continues with new colleagues and as existing qualification requires renewal





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 H&S 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 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. Close monitoring of progress against 70% target for completion of H&S Awareness training by the end of Q4 2025/26. Determine target for end of Q4 2026/27 evidencing continuous improvement through increased compliance
2. Gain assurance over robustness of arrangements that are in place for recording training for staff without access to a computer. Completion for all staff is recorded within MyLearning, records updated once evidence provided
3. Agree timeline with for implementation of Radon monitoring within corporate assets.
4. Work with Homes & Neighbourhoods to further develop monitoring, reporting and oversight of the core building safety compliance risks to gain assurance that risks are being effectively managed
5. Continue to encourage Kirklees Leadership Team complete the IOSH Managing Safely for Senior Executives training

Kirklees COUNCIL

CF01 Children's Safeguarding

Children and young people being at risk of harm and poor outcomes due to increased complexity, referral volumes and a lack of service capacity to respond to the assessed need leading scrutiny by inspection bodies and associated reputational & financial impacts

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

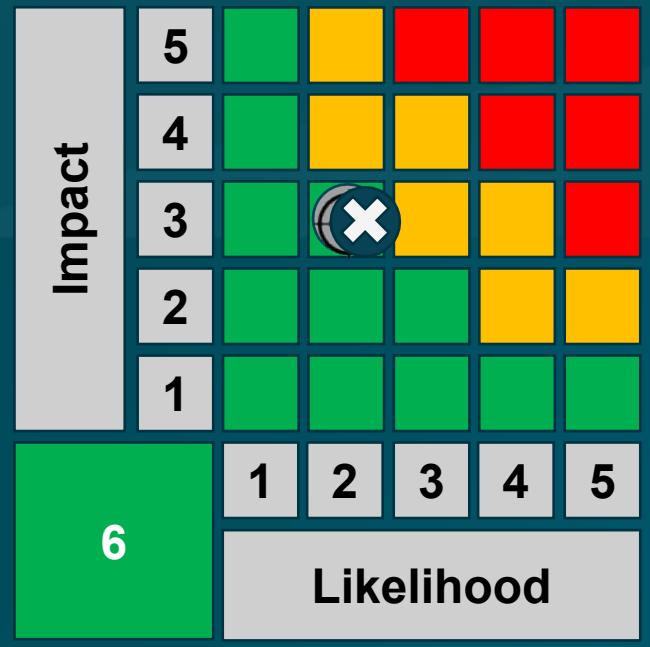
Quarterly update:

- Families First Partnership (FFP) Programme progressing with agreed roadmap to meet April 2027 implementation date. This will develop a multi agency lead practitioner approach, a multi agency family help service and embed family group decision making. Governance and oversight in place with Programme Board established
- Collation of Q3 data return is on track for submission January 2026
- Phase 2 of delivery plan completed and submitted to DfE in Dec 25, in advance of meeting in Q4
- Service wide engagement session took place in Q3, outlining required service developments
- Working with neighbouring authorities to share best practice and identify potential issues

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Kirklees Safeguarding Children Partnership (KSCP) with Safeguarding & Effectiveness Group leading on inter and intra agency audits for assurance
2. Clear oversight, governance and escalation of performance through Quality Assurance Panel, Children's Ambition Board and Children's Scrutiny Panel.
3. Local Authority Designated Officer (LADO) procedures in place
4. Training & supervision, Learning Conversations, Practice Learning Days, annual practice week and a clear procedure for implementing enhanced oversight of practice if required
5. Caseload management and oversight, with effective scrutiny and challenge from Independent Reviewing Officers
6. Robust Quality Assurance process, including Quality Assurance Panel, is well embedded and informs senior leaders about areas for development

Further actions underway:

1. Actions centre on the implementation of FFP and updated Working Together guidance in line with DfE expectations for delivery:
    - Discussions with partners regarding roles and responsibilities in Multi Agency Child Protection Teams and an integrated family help service.
    - Drafting new practice models such as the family group decision making approach to support children staying at home.
    - Engagement with young people, parents & carers to take place
    - Scheduled DfE catch up in Feb 26
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

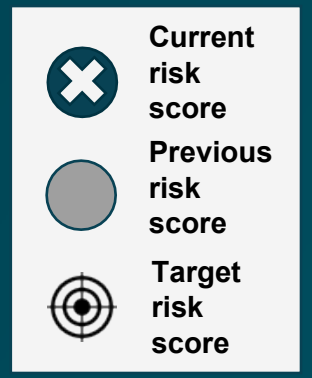
CF02 Education, Health & Care Plans, SEND compliance & financial impact

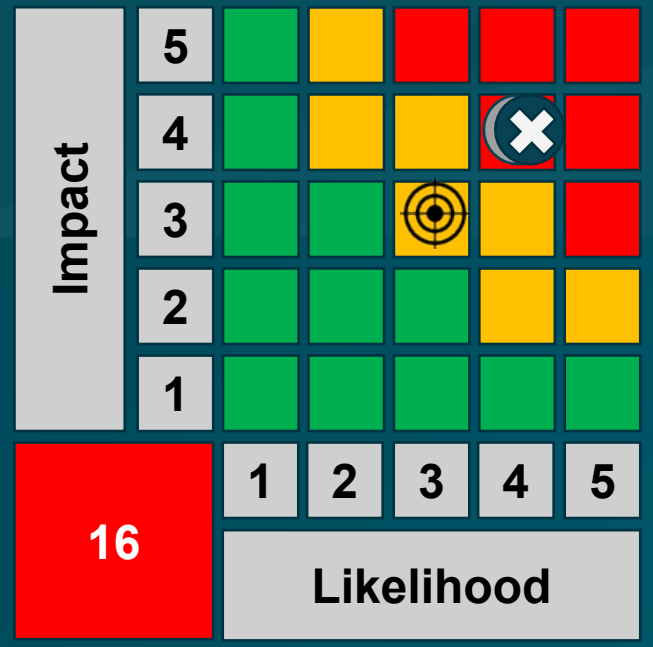
Risk that the EHCP operating model does not meet client or council needs, due to increases in demand, complexity of client needs and a lack of existing local provision, resulting in missed statutory deadlines, regulatory scrutiny, reputational impact and financial consequences

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

Quarterly update:

- Post inspection partnership action plan agreed and published as 'The Big Plan part 3'
- The EHCP cumulative performance at 20 weeks for 2025 remains ahead of England's national average however, the increasing numbers of open assessments over 20 weeks, will result in further pressure on compliance figures in the opening months of the new stats year
- Annual reviews, which remain below national averages, being prioritised at change of phase to enable requirements to be up to date, however this remains an area of pressure
- Cost of placements continue to exceed budget, and impact on budget lines held elsewhere





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. Fortnightly sufficiency meeting in place for agreeing strategies for provision gaps.

Further actions underway:

1. SEND Transformation programme in place to support change delivery
2. 'EHCP tribunal and witness requests' group established to increase grip on cases and identifying areas where further information is required
3. Recruitment underway for locum Education Psychologists to support EHCP compliance
4. Local provision will be enhanced by delivery of two new special schools (both 2027), which should contribute to an improvement in financial position, further sufficiency planning (including post 16 opportunities) underway
5. Engagement with partners and relevant bodies to prepare for and respond to Schools White Paper that is expected in Spring 2026 (delayed / date tbc)

Kirklees COUNCIL

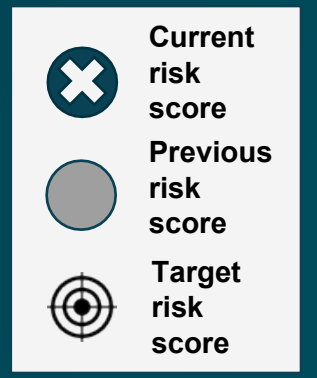
CF03 Sufficiency of Children's Care

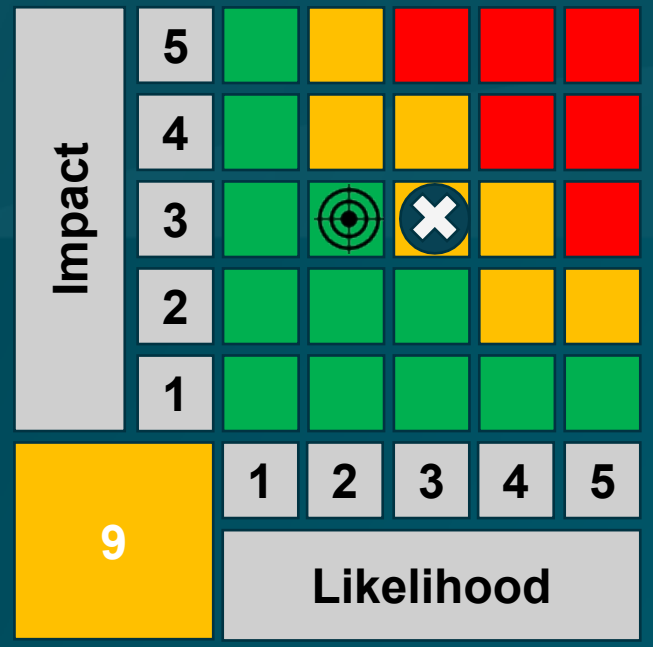
Risk of insufficient provision to meet the assessed needs of Looked After Children and Children in Need in local, appropriately supported placements leading to poor outcomes, budgetary implications, scrutiny from regulatory bodies and reputational damage

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

Quarterly update:

- Residential Home capacity has increased with Woodlands now open, and work underway to open a further 2 bedded home
- Despite strong performance recruiting new foster carers the number of resignations / deregistration's outweighs the numbers being recruited. The process of onboarding and assessing new foster carers means the benefit of increased capacity is not immediate
- We continue to see the cohort of children coming into care being older children with more complex behaviours and needs or larger sibling groups. It is difficult to match these children to residential / other care provision





Controls in operation:

1. OFTED inspection of ILACS, supporting annual self evaluation (SEF) Annual Conversation with Ofsted
2. Placements approval process detailing levels of delegated authority and oversight
3. Clear process in place to manage unregulated provision, if required. Weekly meeting to review each child with representatives from across the service to monitor position and to ensure children move on as soon as they are matched. Increased visits by social workers provides assurance about these children ensuring they are safe and to check accommodation quality.
4. Fortnightly External placement and 16+ overview panel in place – holding responsibility for allocation of resources and monitoring of all placement budgets
5. Risk assessment process in place if we are required to place Care Leavers in Temporary Accommodation
6. Provider uplift requests actively managed as part of contract management

Further actions underway:

1. Preparation for Annual Peer Challenge (Q1 2026-27)
2. Targeted recruitment activity for residential homes staff
3. Fostering service developments including emergency foster carers
4. Development of an edge of care service to reduce children coming into care so soon
5. Enhancing care leaver transitions to avoid the use of temporary accommodation.

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

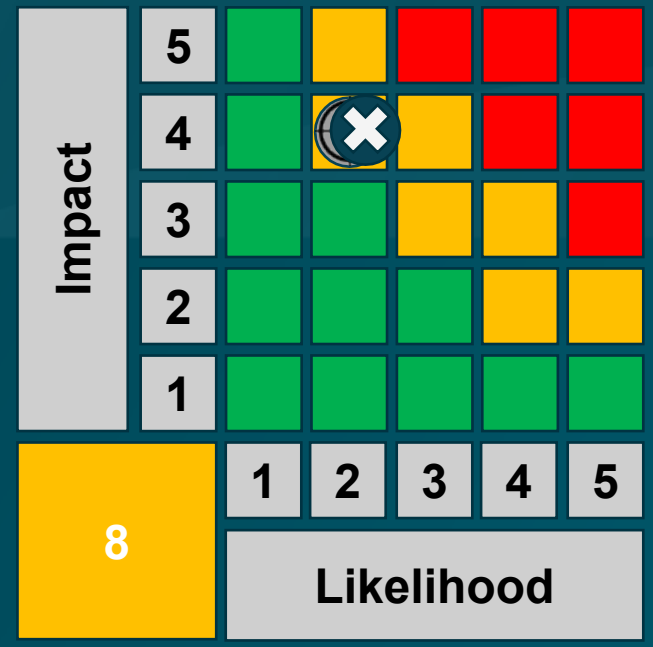
Quarterly update:

- Safeguarding received a “good” rating in the CQC published report
- Professional portal backlog cleared and options appraisal for improved online offer being developed.
- Safeguarding team changes (Early Intervention and Safeguarding Team) fully embedded
- Kirklees Safeguarding Adults Board (KSAB) agreed 2026/27 priorities with expanded Officer membership at all KSAB sub-groups
- Whilst volumes remain low, there has been an increase in the number of Safeguarding Adult Reviews (SARs) undertaken, these are being monitored closely, with resourcing impacts currently manageable

Current risk score

Previous risk score

Target risk score



Controls in operation:

1. Corporate Safeguarding Policy, monitored by Corporate Safeguarding Oversight Group with further oversight and assurance through ELT and Scrutiny
2. Oversight and governance through Kirklees Safeguarding Adults Board (& subgroups) and Health & Adult Social Care Scrutiny Panel
3. Adult Social Care representation on all strategic and operational groups related to safeguarding (eg: Prevent, Domestic Abuse and Modern Slavery)
4. Operational dashboards used by Service Managers and SLT to monitor performance and prioritise / escalate cases as required
5. Self-neglect policy and pathway in place. Self-neglect cases managed through the multi-agency risk escalation conferences
6. Waiting Well Policy in place with S42 enquiries allocated within 5 working days
7. Care Home Early Support & Prevention (CHESP) process is well embedded to manage any care home concerns and Large-scale Safeguarding Enquiry policy will be reviewed in 2026-27
8. Learnings from SAR and Domestic Abuse Related Death Review Reports & Improvement Plans
9. Safeguarding training is part of the council's compliance learning for all staff; Directorate training matrix identifies training need by job role, additional training offer from KSAB for partners

Further actions underway:

1. Safeguarding professional portal and care homes portal are being reviewed with options appraisal presented to the Tech Board in January for steer
2. Improvements to Safeguarding pathways within Mosaic have been scoped with implementation on track for the end of Q1 2026/27. These will deliver improved data quality for safeguarding referrals, concerns and S42 enquiries.
3. Person in position of trust (PIPOT) policy drafted with input from Legal. Formal sign-off planned in Q4 via SCLT. Policy ensures internal processes are clear and in line with parallel Council procedures. Programme of comms and training to follow to ensure embedded operationally.
4. KSAB self assessment underway prior to challenge event

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

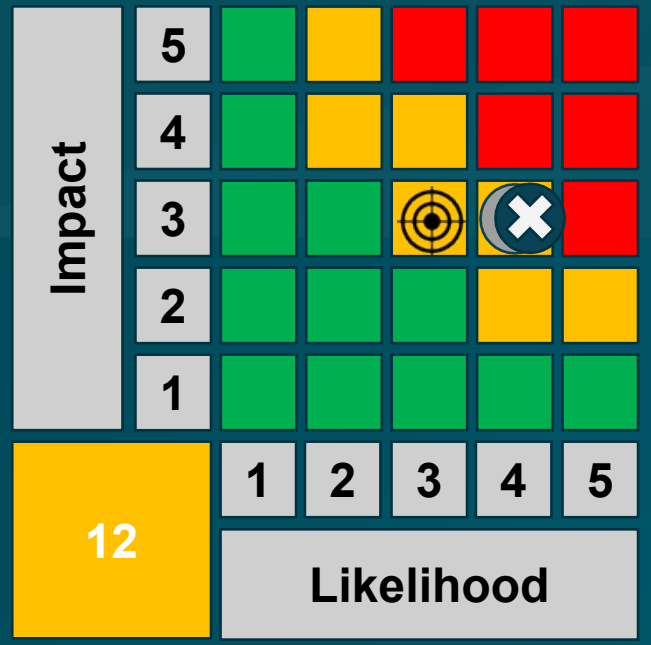
Quarterly update:

- Continuing to raise awareness across Council Services on how to report tensions to Safer Kirklees Community Safety Partnership and Partnership Intelligence Portal (PIP)
- Ongoing monitoring of national movements, local impact and tensions through partnership governance
- Prevent training with schools continues, counter-terrorism e-learning for council staff now mandatory
- Prevent Home Office projects in planning stages with commissioned providers for specific groups
- Awareness campaigns have taken place on hate crime, women's safety and domestic abuse
- Strategic Intelligence Assessment in progress, data and insight being gathered and analysed to assess risk, system pressure to help inform priorities for the new Partnership Plan

Current risk score

Previous risk score

Target risk score



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. Expanding community tension awareness and reporting across council services as continuous reminder as staff move on from roles etc – Q4 25/26
2. Deliver awareness campaigns for Prevent, Domestic Abuse and Sexual Violence alongside partners – Q4 25/26.
3. Serious Violence partnership high priority area work to support direction of resources, community engagement including commissioning of interventions – Q4 25/26
4. Prevent Action Plan to be refreshed at Prevent Silver Group – Q4 25/26
5. Prevent E-Learning offer to all organisations to be launched via Corporate MyLearning (Currently via Adults/Children Safeguarding Boards Website) – Q4 25/26
6. Strategic Intelligence Assessment (SIA) further developing to inform the Strategic Priorities for the new Partnership Plan to be worked through with Overview, Scrutiny & Management Committee (OSMC) in 2026 ahead of developing the full plan – Q2 26/27

Kirklees COUNCIL

DEV01 Corporate Assets portfolio management

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

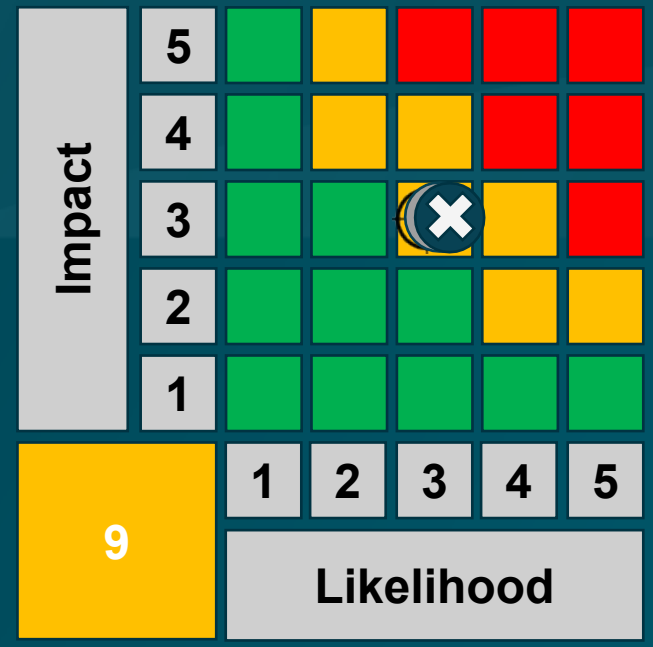
Quarterly update:

- Building Safety compliance levels continue to improve and meet current regulations
- Asset rationalisation continues to progress well and on track to meet income target
- External review of council assets has concluded with recommendations being developed that will deliver a sustainable property estate, of appropriate size and condition, within available financial constraints
- Additional resources recruited to Public Private Partnership expiry posts internally, resulting in reduced capacity in day-to-day management of the contract
- Review of schools traded service ongoing with good feedback regarding proposed offer from Schools

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 26/27. Any issues are reported to respective School or Corporate Facilities Management team immediately.
2. H&S Oversight Board, Building Safety & Assurance Board (Corporate)
3. Corporate Compliance Guide and supporting Processes & Procedures, available on the intranet
4. Programme of disposals and asset rationalisation to reduce available assets and use only as required to reduce revenue costs
5. New programmes for schools and corporate capital investment being developed and will follow approval flightpath from February 2026.
6. We remain part of NISTA contract expiry pilot, with condition surveys completed at a sample of 4 schools following the PFI Asset Condition Playbook. DfE and NISTA representatives are in place as observers on SPV Boards.

Further actions underway:

1. Procurement of new Corporate Assets Facilities Management database
   - At due diligence stage following procurement, projected implementation April 2026
   - Data upload to begin once implemented
2. Asset Strategy & Core Estate review
   - Asset Strategy being considered alongside ongoing review of Arcadis recommendations
   - Asset portfolio review underway, initially ward review data cleansing, then to review alongside K2 data, full cleanse following this to create core data.
3. Continued focus on addressing issues at high priority assets including Dewsbury Sports Centre, Cleckheaton Town Hall, Batley Town Hall & Batley Library
4. Work underway regarding savings proposals which were reported and approved
5. New PFI Contract Oversight Board being set up and review of appropriate Officer / Member representation on relevant Boards being undertaken

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

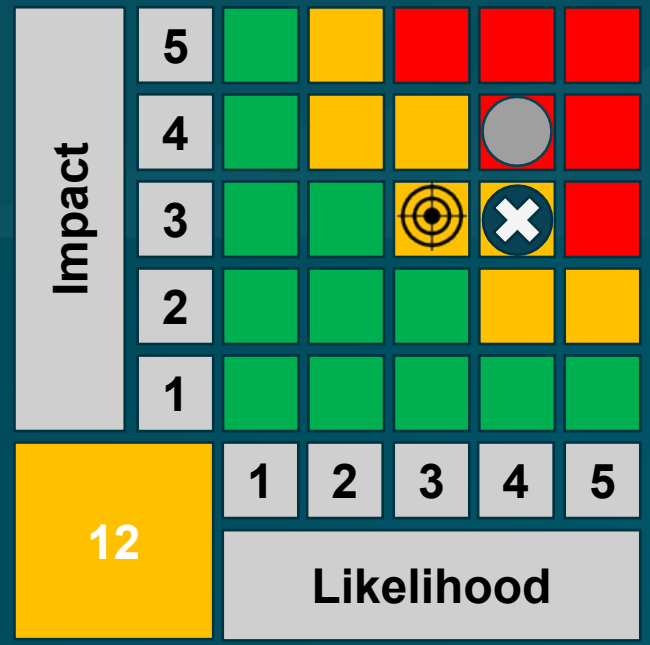
Quarterly update:

- Risk score has reduced as whilst demand pressures result in continued usage of Temporary Accommodation (TA), the number of households in B&B (and families in particular) has continued a positive downward trend. At the end of Q3 - 374 in TA overall, 106 of which in B&B. 22 families in B&B of which 8 over six weeks
- 3-year funding award for homelessness announced by Govt in December 2025 – 2026/7 allocation is £2.1m for homeless prevention and rough sleeping, an increase on previous years
- Government published its national strategy for homelessness in December 2025
- Housing supply, and availability of move-on accommodation remain major concerns with consequent impacts on temporary accommodation usage

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. Transformation priority, with focus on reduction of B&B usage, expected to continue to support into 2026/7
4. Effective utilisation of 2025/6 grants to maximise homeless prevention. Work to determine spend plans for new 2026/7 grant allocation.
5. Options to secure additional supply of TA through acquisition or lease from other landlords / providers reviewed on continuous basis

Kirklees COUNCIL

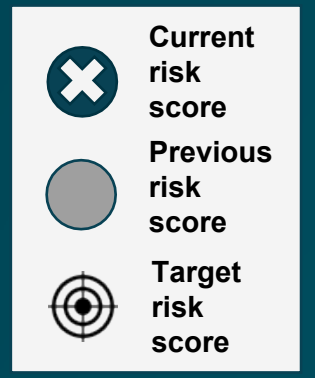
DEV03 Economic Growth & Resilience

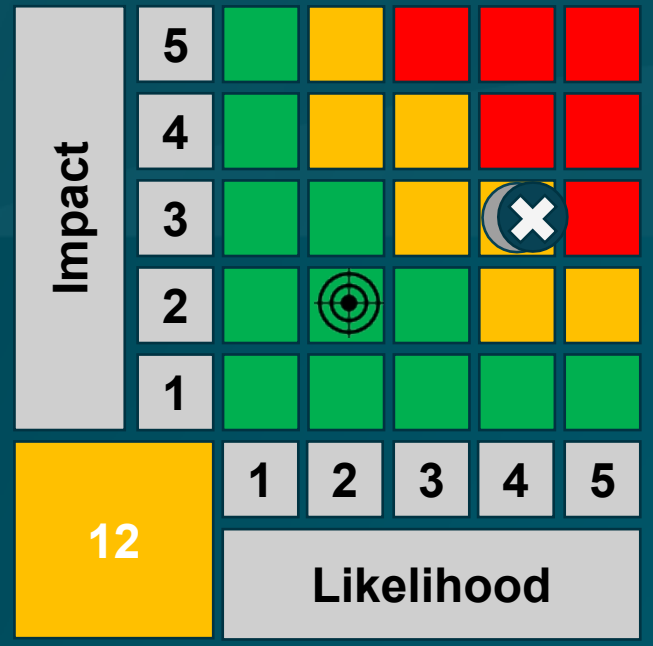
Failure to deliver economic growth and resilience through regeneration and infrastructure developments due to ineffective targeting of projects, funding availability and delays / overspends in delivery leading to a decline in prosperity, less affluent communities and consequential reputational damage

Risk Owner: David Wildman, Service Director, Skills & Regeneration

Quarterly update:

- Public and media interest in schemes and emerging masterplans remains high
- Our Cultural Heart on track for phase one opening in summer 2026 and George Hotel progressing to final stage of contract signing to enable works to commence early in 2026 following planning approval
- Progressing approval of plans for Huddersfield Market, ensuring the £16.5m Levelling Up funding secured is not at risk, with ongoing engagement and consultation as required
- Dewsbury Town Plan investment projects at Station Apartments, Civic space public realm, and Arcade progressing; procurement progressing on Market and awaiting outcome of Pride in Place
- Cooper Bridge scheme progresses, discussions ongoing with WYCA and Calderdale Council re: transfer of powers





Controls in operation:

1. Formal project management approach adopted (Prince2, Agile etc)
2. Clear approach to project governance including roles & responsibilities, documentation requirements and escalation routes
3. Revised governance structure in place with separate officer boards addressing Pipeline projects and those in Delivery
4. Key stakeholders (Procurement, Finance etc) engaged at outset and sign off agreed business case
5. Collaborative working to align funding requirements and sign offs where funding is provider by WYCA or other agencies
6. Working in conjunction with Strategic Delivery Partner(s)
7. Adherence to local planning authority policies and procedures
8. Co-ordination and Comms planning sessions taking place between project managers, engagement leads and comms team

Further actions underway:

1. Council wide review of governance and reporting of the capital plan to focus on affordability, improvements to forecasting and support timely delivery
2. Improvements in contract management capacity and capability
3. Internal audit activity covering Project Management and Delivery – to complete in Q4 2025/26
4. Consider how to ensure effective coordination of multiple projects within the same area, supported by comms strategy and appropriate Cllr involvement

Kirklees COUNCIL

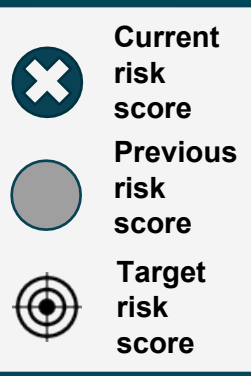
HN01 Housing Safety & Quality

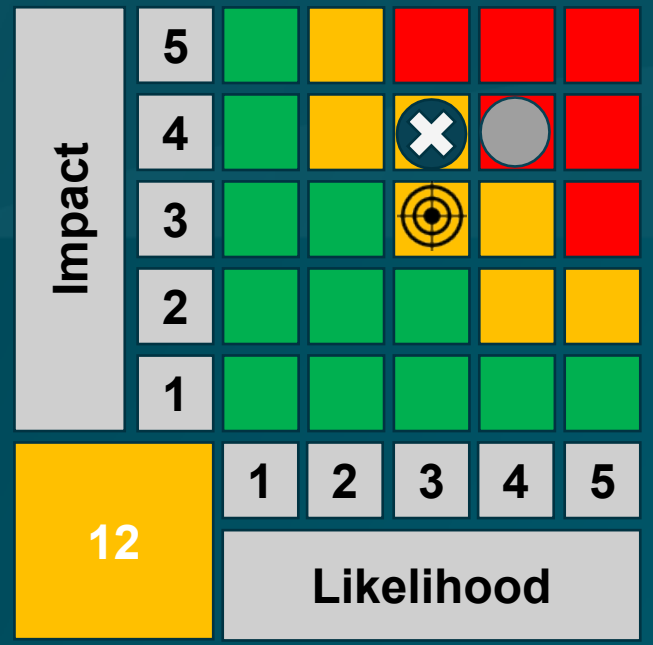
Risk that residential housing stock does not meet building safety regulations and / or the decent homes consumer standard resulting in service user dissatisfaction, complaints, regulatory scrutiny and reputational damage

Risk Owner: Phil Jones, Service Director Homes & Neighbourhoods

Quarterly update:

- Risk score reduced reflecting progress on focus areas of fire safety, damp, mould & condensation and water quality
- Continued compliance with Awaab's Law with cases below business-as-usual level
- Fire Risk Assessment programme has now completed and has moved to a BAU cyclical programme. Tranche 1 of the fire remedial programme has commenced
- Stock condition programme is now under way with hazards reported as necessary and tracked to remediation.
- Water quality programme is completed, and all stock has been assessed as low risk
- Voids improvement plan in place with multidisciplinary team located within Property Services





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:

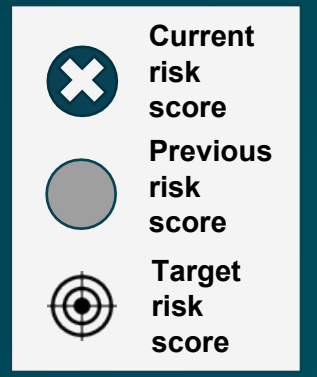
1. Governance effectiveness review has completed with proposed governance structure at Cabinet in January for approval.
2. Review of 5 year Capital Investment Plan (£160m) completed with new Investment & Capital Assurance Board to provide oversight
3. Stock condition surveys to inform future capital programme commenced 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 and optimum solutions to meet these needs
5. Implementation of the new housing management system is underway. Phase 1 went live in October 2025
6. Monitor and review of consultation on changes to Decent Homes Standard and consider impact of proposed implementation timescales

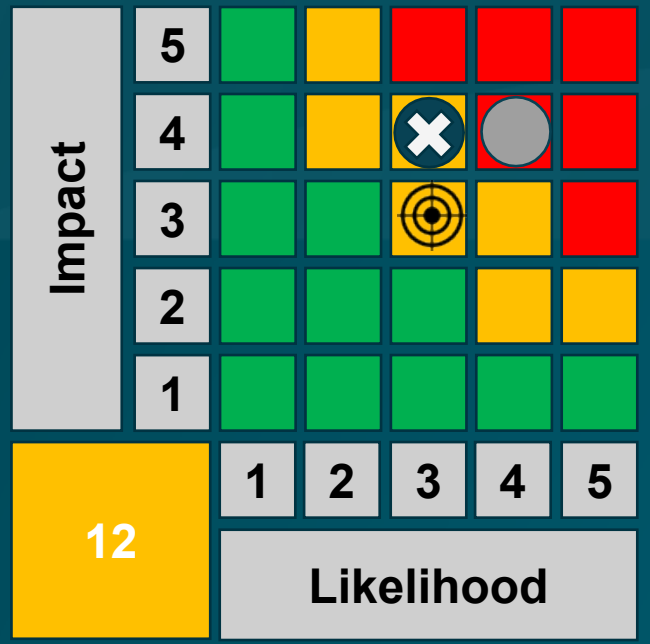
Kirklees COUNCIL

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 reduced reflecting that appointments have been made, increasing resourcing levels, however it should be noted that a senior vacancy remains which continues to impact on the council's ability to access and utilise grant funding opportunities for climate related projects
- Notification received that Kirklees has retained 'CPD Cities' A grade for sustainability for 2025
- External consultancy to undertake an in-depth review is still being considered, supported by Gainshare resources

Controls in operation:

1. Environment & Climate Change Scrutiny Panel in place
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 continue to be 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. Review of the upcoming electricity contract and decisions for 2026 onwards.
3. LEVI (Local Electric Vehicle Infrastructure) funded electric vehicle infrastructure in delivery phase and 148 new charging points to be installed over the next 18 months
4. The new staff team are carrying out a review to ascertain position of council re climate change matters to ensure most effective use of resources

Kirklees COUNCIL