

Contact Officer: Sheila Dykes

KIRKLEES COUNCIL

OVERVIEW AND SCRUTINY MANAGEMENT COMMITTEE

Friday 27th March 2026

Present:

Councillor Itrat Ali
Councillor Andrew Cooper
Councillor Jo Lawson

In attendance:

Councillor Carole Pattison, Leader of Council
Councillor Graham Turner, Portfolio Holder for Finance
Alice Carruthers, Senior Finance Officer
Sonya Daines, Data and Insight Enablement Lead
Kevin Mulvaney, Service Director, Finance
Andy Simcox, Service Director, Strategy and Innovation

Apologies:

Councillor Zarina Amin

- 83 Election of Chair**
RESOLVED -
That Councillor Andrew Cooper be appointed Chair for the meeting
- 84 Membership of the Committee**
Apologies for absence were received on behalf of Councillor Zarina Amin.
- 85 Minutes of Previous Meeting**
RESOLVED –
That the Minutes of the meetings held on 16th January 2026 and 13th February 2026 be approved as a correct record.
- 86 Declaration of Interests**
No interests were declared.
- 87 Admission of the Public**
All agenda items were considered in public session.
- 88 Deputations/Petitions**
No deputations or petitions were received.
- 89 Corporate Financial Monitoring - Quarter 3 Report 2025-2026**
Kevin Mulvaney, Service Director, Finance presented the Corporate Financial Monitoring Report for Quarter 3 2025-2026, with reference to the report submitted to Cabinet on 24th March 2026.

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The Portfolio Holder for Finance and Regeneration, Councillor Graham Turner, introduced the item.

The presentation set out:

- Revenue headlines
- Revenue monitoring, with a breakdown across each directorate.
- Key pressures on each directorate.
- Council Reserves
- Housing Revenue Account position and variances.
- Capital Headlines.
- Direct Schools Grant (DSG) Headlines.
- Prudential and Treasury Management Indicators

Highlighted points included:

- The revenue outturn position at Quarter 3 was a forecast overspend of £4.1m, which was an improved position from Quarter 2 (£5.1m) and was expected to improve further by the year end.
- Pressures in respect of children' social cares and adult social care remained associated with demand, complexity of cases and cost of placements.
- Overspends were also projected in respect of home to school transport, parking and adverse weather budgets.
- Assurance was given that significant budget provision had been made in the 2026/27 budget in relation to social care demand, home to school transport and parking and there was also a contingency reserve of £3.8 m.
- Savings were projected within corporate resources and central budgets relating to energy rebates and treasury savings from slippage in the capital plan plus additional investment income.
- The projected deficit on the Dedicated Schools Grant (DSG) of £17.5m this year with the cumulative deficit standing at £81.3m. The Government had confirmed an intention to fund 90% of this historic deficit subject to the authority completing a satisfactory plan. The remaining deficit would need to be addressed by March 2028.
- Spend on the Capital Plan was currently £173 million, which was higher than in previous years and reflected the investment in 'our cultural heart' and the special schools.
- Attention was drawn to the future potential impact of the rises being seen in the cost of borrowing and inflation. It was noted that the Council was tied into energy contracts so it was anticipated that any impact in respect of fuel prices would be seen in 27/28 rather than 26/27.

Questions and comments were invited from Committee Members, with the following issues being covered:

- In respect of the DSG deficit, aside from the Government commitment to clear 90% of the historical deficit an indication had also been given that local authorities would receive proportionate funding associated with the 2026/27 deficits, which would mitigate some cost to the Council. In addition, two new special schools were being built which would assist in bringing down the costs of placements and reduce the in-year deficit. The Government were undertaking consultation on a White Paper in relation to Special Educational Needs and

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Disabilities (SEND) which was anticipated to contain a wide range of reforms and post 2028 the intention was that the Government would take responsibility for the cost of SEND.

- The Council had budgeted for all new borrowing and re-financing of existing borrowing at a rate of 4.69%. It was not possible to predict what might happen with interest rates. A mix of short-term and long-term borrowing was utilised to reduce and mitigate risk.
- An explanation was given in respect of how demand was forecast but this was difficult to do. There was a budget contingency reserve to assist if needed.
- There continued to be pressure in adult and children's social care in the last quarter so that remained a risk if the numbers continued to rise into 2026/27. There were likely to be further underspends in Treasury and the finance team would also explore other accountancy tools that could help mitigate the position.
- The delay in the transfer of the care homes had cost £867k in budget terms. And had been funded by use of the budget contingency reserve.
- Discussions were ongoing with the NHS in terms of funding of placement costs at care homes.

RESOLVED –

- (1) That the Portfolio Holder for Finance and Regeneration and the Head of Commercial Services be thanked for attending the meeting and updating the Committee.
- (2) That the current position be noted and it be recommended that these reports continue to be submitted to the Committee on a regular basis so that Lead Members are kept informed and can pick up any items within the remit of their Panel that may require further scrutiny.

90 Corporate Risk - Quarter 3 Report 2025-2026

Councillor Graham Turner, the Finance and Regeneration Portfolio Holder, introduced the Corporate Risk Report for Quarter 3 2025/26 with reference to the report submitted to Cabinet on 24th March 2026.

Alice Carruthers, Senior Finance Officer presented the report, highlighted the following points:

- One new risk had been raised in Quarter 3 in respect of the sufficiency of care for looked after, or children in need including fostering, special guardian relationships and residential home provision. This had been highlighted as part of the annual review of the two safeguarding risks.
- One risk had increased associated with data processing an access to information to reflect the increasing volume of subject access requests. The position had improved in Quarter 4, to date, and this would be shown in the next quarterly update. The controls and actions to mitigate were explained.
- Eight scores had decreased, including three related to Council finances; budget monitoring and management, medium-term financial stability and capital plan management.

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Questions and comments were invited from Committee Members, with the following issues being covered:

- In respect of the measures being taken to respond to the issues around looked after children and placements, there was a programme of recruitment for foster carers and the importance of retention was recognised. The purchase of an additional small group residential home would also assist in reducing the cost of external placements.
- The improvement in staffing resources in the climate change team was welcomed and the hope expressed that more external funding could be achieved.
- In relation to any changes in political structure further to the elections in May there was a clear, documented and established governance framework in place.

It was noted that it was important that there was a focus on the understanding of roles and responsibilities of elected members and officers.

RESOLVED -

- (1) That the Cabinet Member for Finance and the Senior Finance Officer be thanked for attending to update the Committee.
- (2) That the current position be noted and it be recommended that these reports continue to be submitted to the Committee on a regular basis so that Lead Members can pick up any items within the remit of their Panel that may require further scrutiny.

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Council Plan and Performance Update - Quarter 3 Report 2025-2026

Councillor Carole Pattison, the Leader of the Council introduced the report in respect of the Council Plan and Performance for Quarter 3 of 2025/26, supported by Andy Simcox, Service Director for Strategy and Innovation and Sonya Daines, Data and Insight Enablement Lead.

The report had been submitted to Cabinet on 24th March 2026 and included:

- Details on activity and delivery against the four priorities within the Council Plan and planned activity for Quarter 3.
- The latest data against the Council's Key Measures for 2025/2026, including a summary of the direction of travel and planned activity for Quarter 3.
- Benchmarking data to contextualise the demand and performance trends and enable comparison of Kirklees with regional and national rates.

The following points were highlighted:

- Smoking in pregnancy rates were down and were below the national average.
- Sickness absence was improving.
- 87% of Freedom of Information requests had been completed on time, which was an improvement on the previous year, despite an increase in demand.
- Council Tax and Business Rate collection rates were down in comparison with last year and were below those of statistical neighbours.
- There had been a reduction in the number of Education Health and Care Plans completed within the 20-week deadline, associated with rising demand.
- Demand had risen for home to school transport.

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Questions and comments were invited from Committee Members, with the following issues being covered:

- Analysis of Councillor Enquiries data was being undertaken and this information would be brought forward in due course. The aim was to try and reduce the number of repeat queries.
- It was suggested that it would be helpful for Councillors to be able to check outstanding enquiries online, perhaps through a dashboard tool, to help them manage their casework.
- In relation to measuring performance in terms of protecting the vulnerable such as supporting/advising those residents who were eligible for benefits, it was explained that this was one of the key priorities within the Council plan and there were a number of measures associated with it, a number of which would be service specific. It was accepted that it might be useful to bring all the relevant information together in order to assess the progress being made and inform the anti-poverty strategy. This could include data such as the number of face-to-face advice sessions held, the number of appeals supported, foodbank use, the amount of money that had been brought into the local economy as a result of such action by the Council, as well as the services being provided by other partner organisations in this field.

RESOLVED -

- (1) That the Leader of Council and officers be thanked for attending to present the update.
- (2) That the current position be noted and it be recommended that these reports continue to be submitted to the Committee on a regular basis so that Lead Members can pick up any items within the remit of their Panel that may require further scrutiny.

92 Work Programme 2025-2026

The latest version of the Committee's Work Programme for 2025-2026 was submitted for consideration and noted.

Thanks were expressed to the Governance Team for their support of the Committee and the Scrutiny Panels during the last twelve months.