

Leicester
City Council

MEETING OF THE OVERVIEW SELECT COMMITTEE

DATE: THURSDAY, 28 NOVEMBER 2019
TIME: 5:30 pm
**PLACE: Meeting Room G.01, Ground Floor, City Hall,
115 Charles Street, Leicester, LE1 1FZ**

Members of the Committee

Councillor Cassidy (Chair)
Councillor Joel (Vice-Chair)

Councillors Dawood, Halford, Joshi, Khote, Kitterick, Porter, Waddington and Westley

Youth Council Representatives

To be advised

Members of the Committee are invited to attend the above meeting to consider the items of business listed overleaf.

Elaine Baker

For Monitoring Officer

Officer contacts:

Kalvaran Sandhu (Scrutiny Policy Officer)
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Further information

If you have any queries about any of the above or the business to be discussed, please contact:

Elaine Baker, Democratic Support Officer on 0116 454 6355.

Alternatively, email elaine.baker@leicester.gov.uk, or call in at City Hall.

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PUBLIC SESSION

AGENDA

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1. APOLOGIES FOR ABSENCE

2. DECLARATIONS OF INTEREST

Members are asked to declare any interests they may have in the business to be discussed.

3. CHAIR'S ANNOUNCEMENTS

4. MINUTES OF THE PREVIOUS MEETING

[Appendix A](#)

The minutes of the meeting of the Overview Select Committee held on 19 September 2019 are attached and Members are asked to confirm them as a correct record.

5. PROGRESS ON ACTIONS AGREED AT THE LAST MEETING

To note progress on actions agreed at the previous meeting and not reported elsewhere on the agenda (if any).

6. QUESTIONS, REPRESENTATIONS AND STATEMENTS OF CASE

The Monitoring Officer to report on the receipt of any questions, representations and statements of case submitted in accordance with the Council's procedures.

7. PETITIONS

The Monitoring Officer to report on any petitions received.

8. TRACKING OF PETITIONS - MONITORING REPORT [Appendix B](#)

The Monitoring Officer submits a report that updates Members on the monitoring of outstanding petitions. The Committee is asked to note the current outstanding petitions and agree to remove those petitions marked 'Petitions Process Complete' from the report.

9. DRAFT LEICESTER LOCAL PLAN (2019 - 2036) - PUBLIC CONSULTATION [Appendix C](#)

The Director of Planning, Development and Transportation submits a report and presentation outlining the main strategies and policies of the draft local plan for public consultation in January/February 2020. The Committee is recommended to note the key local plan strategies and policies, and provisions for consultation, and pass any comments to the Director for consideration.

10. REVENUE BUDGET MONITORING APRIL-SEPTEMBER, 2019/20 [Appendix D](#)

The Director of Finance submits a report forecasting expected performance against the budget for the year. The Committee is recommended to consider the overall position presented within this report and make any observations it sees fit.

11. CAPITAL BUDGET MONITORING - APRIL-SEPTEMBER 2019/20 [Appendix E](#)

The Director of Finance submits a report showing the position of the capital programme for 2019/20 as at the end of September 2019 (Period 6). The Committee is recommended to consider the overall position presented within this report and make any observations it sees fit.

12. INCOME COLLECTION APRIL 2019 - SEPTEMBER 2019 [Appendix F](#)

The Director of Finance submits a report detailing progress made in collecting debts raised by the Council during the first six months of 2019-20, together with debts outstanding and brought forward from the previous year. The Committee is recommended to consider the overall position presented in this report and

make any observations it sees fit.

13. MID-YEAR REVIEW OF TREASURY MANAGEMENT ACTIVITIES 2019/20 **Appendix G**

The Director of Finance submits a report reviewing how the Council conducted its borrowing and investments during the first six months of 2019/20. The Committee is recommended to note the report and pass comments to the Director of Finance and the Executive for consideration.

14. QUESTIONS FOR THE CITY MAYOR

The City Mayor will answer questions raised by members of the Overview Select Committee on issues not covered elsewhere on the agenda.

15. SCRUTINY COMMISSIONS' WORK PROGRAMMES **Appendix H**

- a) To receive and endorse the Scoping Document for the review of “Economic Development at Local Level” (Economic Development, Transport and Tourism Scrutiny Commission) (**Appendix H1**);
- a) To receive and endorse the Scoping Document for the review of “Adult Social Care Workforce Planning: Looking to the future” (Adult Social Care Scrutiny Commission) (**Appendix H2**); and
- b) To receive and endorse the report of the review “The Underachievement of ‘Black Caribbean’ and ‘White British Working-Class’ pupils of secondary school age in Leicester” (Children, Young People & Schools Scrutiny Commission) (**Appendix H3**).

16. OVERVIEW SELECT COMMITTEE WORK PROGRAMME **Appendix I**

The current work programme for the Committee is attached. The Committee is asked to consider this and make comments and/or amendments as it considers necessary.

17. ANY OTHER URGENT BUSINESS



Leicester
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Appendix A

Minutes of the Meeting of the
OVERVIEW SELECT COMMITTEE

Held: THURSDAY, 19 SEPTEMBER 2019 at 5:30 pm

P R E S E N T :

Councillor Cassidy (Chair)
Councillor Joel (Vice-Chair)

Councillor Dawood
Councillor Joshi
Councillor Khote

Councillor Kitterick
Councillor Porter
Councillor Waddington

In Attendance:

Sir Peter Soulsby – City Mayor

* * * * *

23. APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillor Halford and Councillor Westley.

24. DECLARATIONS OF INTEREST

No declarations were made.

25. CHAIR'S ANNOUNCEMENTS

The Chair made no announcements.

26. MINUTES OF THE PREVIOUS MEETING

AGREED:

That the minutes of the meeting of the Overview Select Committee held on 20 June 2019 be confirmed as a correct record.

27. PROGRESS ON ACTIONS AGREED AT THE LAST MEETING

AGREED:

- 1) That, further to minute 13, “Questions for the City Mayor – Shops near the Market Place that are due to be demolished”, the City Mayor be asked to consider whether these properties, and others such as them, could be offered on short term leases for start-up businesses; and
- 2) That, further to minute 15, “Capital Budget Monitoring Outturn 2018/19”, the Director of Planning, Development and Transportation be asked to circulate the expected timetable for the implementation of the Putney Road scheme.

Action	By
Consideration to be given to whether the five properties in Market Square that are due to be demolished, and others such as them, can be offered on short term leases for start-up businesses	City Mayor
The expected timetable for the implementation of the Putney Road scheme to be circulated to all members of the Committee.	Director of Planning, Development and Transportation

Councillor Joshi arrived during consideration of this item

28. QUESTIONS, REPRESENTATIONS AND STATEMENTS OF CASE

The Monitoring Officer reported that no questions, representations or statements of case had been received.

29. PETITIONS

The Monitoring Officer advised that there were no petitions to report.

30. TRACKING OF PETITIONS - MONITORING REPORT

Members considered the Tracking of Petitions Monitoring Report and noted an update, which had been circulated prior to the meeting.

Members were reminded that when a petition was listed as Complete, it had been processed in accordance with the Council's procedures and officers were ready to provide a response to the petitioners.

AGREED:

That the petitions marked 'petition complete', namely 11/01/2019, 19/02/2019, 26/02/2019, 07/03/2019, 12/03/2019, 29/04/2019, 28/05/2019,

10/06/2019, 17/06/2019 and 23/07/2019 be removed from the Monitoring Report.

Action	By
Petitions marked 'petition complete', namely 11/01/2019, 19/02/2019, 26/02/2019, 07/03/2019, 12/03/2019, 29/04/2019, 28/05/2019, 10/06/2019, 17/06/2019 and 23/07/2019 be removed from the Monitoring Report	Democratic Support Officer

31. QUESTIONS FOR THE CITY MAYOR

The following questions were put to the City Mayor at the meeting:

a) Parking Bays for Disabled Drivers

Councillor Joshi stated that he understood that parking bays for disabled drivers were no longer being installed and asked if there was any progress on changing this decision, as many requests for these bays were received by Ward Councillors.

The City Mayor advised that he was not aware that they were not being installed and asked Members to provide details of any examples of this in order that the circumstances could be investigated.

Action	By
Members to advise the City Mayor of any examples of which they are aware of requests for parking bays for disabled drivers being refused, in order that their circumstances can be investigated	All Members

b) City Centre Parking for Councillors

Councillor Porter noted that City Councillors received free parking in the city centre and asked if this was appropriate when the Council was considering introducing a Workplace Parking Levy (WPL).

In reply, the City Mayor reminded Members that, at present, only the potential for introducing a WPL was being considered. All comments would be considered and if a WPL scheme was introduced the system developed would take comments into account.

c) Putney Road Scheme

Councillor Porter asked whether the Putney Road scheme had been deferred until a scheme had been agreed for the Evesham Road boundary road.

The City Mayor advised Councillor Porter that the Putney Road scheme would be considered under minute 33, "Capital Budget Monitoring – Period 3, 2019/20", below.

d) Potential Evesham Road Boundary Road Scheme

Councillor Porter asked whether progress had been made with developing proposals for an Evesham Road boundary road scheme, or whether this had been abandoned.

The City Mayor reminded Members that he had repeatedly stated that there was no Evesham Road boundary road scheme. However, a proposal for a road that crossed the edge of Aylestone Meadows was being considered, to provide some relief from traffic for Aylestone. This would be considered by the Economic Development, Transport and Tourism Scrutiny Commission, including in the context of the forthcoming consultation on the developing Local Plan.

Councillor Porter noted that currently there was no highway line across this land and questioned why it would be considered by the Scrutiny Commission.

The City Mayor explained that the road scheme that would be considered by the Scrutiny Commission had been requested for many years by people in Aylestone, due to significant problems with traffic. It would be very expensive to provide a boundary road and it was not considered to be a realistic possibility that funds could be found for such a scheme in the near future. The development of the Local Plan therefore provided an opportunity to consider if one could be justified at any point. Other roads in the city had similar problems with traffic, (such as Upperton Road and Middleton Street), but no funding was available for schemes to alleviate traffic on them either and no bids for any had been made.

The Chair reminded Members that this Committee's work programme included consideration of the draft Local Plan, which also would be considered at relevant Scrutiny Commissions and by full Council.

32. REVENUE BUDGET MONITORING - PERIOD 3, 2019/20

The Director of Finance submitted a report giving an early indication of expected performance against the revenue budget for the year, explaining that it set out the position at the end of the third month of the financial year. No forecast of future performance was included, as the aim at this stage of the financial year was to provide awareness of areas in which financial pressures were being identified. The report for the next quarter would show the half-year performance and would include a spending forecast.

The Committee expressed some surprise that the Delivery, Communications and Political Governance division and the Human Resources division were forecasting underspends and questioned what the Digital Transformation Team would be doing.

In reply, the Director for Delivery, Communications and Political Governance advised that the underspends related to vacancies in the Human Resources function and reductions in non-staff expenditure, (such as printing costs). The Digital Transformation Team had been established for a fixed period and was not part of the Council's core establishment, so was unbudgeted. Therefore, where possible, underspends were used to cover the cost of the team, which would be looking at how the best use of technology could be made in delivering the Council's services. Confirmation of the number of staff in the team and the costs involved could be provided for Members.

Some concern was expressed at the forecast overspend in Coronial Services and Members queried how this would be accommodated in future spending forecasts. In reply, the Director of Finance explained that, although technically part of the Council and funded by the Council, the Coroner was an officer of the Crown. The Council therefore could not ask her to reduce the work being done. However, the current Coroner had been very effective at reducing costs.

Some concern also was expressed that investment by Tourism, Culture and Inward Investment services had not yet resulted in Leicester becoming a destination city and that Leicester Market was deteriorating, including problems arising from anti-social behaviour around the Market.

In response to this, the City Mayor advised the Committee that the Market continued to provide quite a significant income. However, the Market was changing and investment was being made in the area around it to acknowledge this change. Problems had been experienced with anti-social behaviour around the Market throughout its history, but it was hoped that the continued investment would replicate the success of the redevelopment of the meat and fish areas. The Council was determined that the Market would not close and this investment would help ensure that this did not happen.

Members also expressed some concern that reviews such as that for Technical Services had been delayed, which inevitably delayed any savings that would be made. The Director of Finance explained that if this was to have an impact on the services it would be expected that the Director would report it through the monitoring reports submitted to the Committee.

Attention was drawn to the anticipated pressures on the Housing General Fund in relation to temporary accommodation. This was part of the wider issue of homelessness, so it was suggested that it could be useful to have a briefing on these issues and budgetary pressures.

When considering Adult Social Care services, the Committee queried how much the Council would save by changing the disregard rules for certain allowances. The Adult Social Care Scrutiny Commission had been advised that people could have to pay more towards their services, but at that time the financial profiling of the savings that this would achieve was not set out. Members noted that any changes would be made following the current public consultation on possible options, information on which could be provided.

The increase of long term Adult Social Care service users was noted. The Director of Finance explained that there had been an increase over the last 5 – 10 years. People continued to enter and leave the system and previously these numbers had been fairly equal. However, people were now needing these services earlier in life and were living longer, leading to an increase in long term service users. It was not possible to predict future trends, particularly in a city such as Leicester, but the numbers appeared to be more stable at present. However, it was anticipated that pressure would continue as people lived longer with significant health issues. There currently were no plans to change assessment criteria for care packages, but the government's long-awaited Green Paper on adult social care could consider this issue.

In response to a question about potential savings from the review of Sports Services, the Director of Finance explained that this review related to the staffing structure, how facilities and buildings were managed and how to create a more commercial focus for the services. The Committee noted this, but was concerned that users of leisure centres were being encouraged to sign up to monthly direct debit payments and could no longer pay per session. This was of particular concern in relation to the move towards community prescribing by medical services, which included using leisure centre facilities. The Director of Finance reassured members that the Council's facilities still accepted cash as a means of payment and asked for further information to be provided by Members if they had received complaints relating to this.

The Committee sought an assurance that the use of Dedicated Schools Grant (DSG) reserves to meet budget pressures in Education and Children's Services was being managed properly. The Director of Finance explained that there was national pressure on the High Needs Block of the DSG, as all areas had seen an increase in the number of children with special needs. The DSG reserves had been used to fund this Block. This issue would be considered as part of the budget preparation process for 2020/21, but it was recognised that children with Education Health Care Plans (EHCPs) had very specific needs, which the Council was obliged to meet, and schools sometimes needed additional financial support to assist in managing children's behaviour.

The following information also was requested during discussion on this item:

- Figures for the income from the new bus shelter advertising contract; and
- Details of anticipated income from the new charges to be introduced for pre-planning application meetings and discussions.

AGREED:

- 1) That the position presented within the report be noted; and
- 2) That the following information be provided for Members by the Directors indicated:

Action	By
Confirmation of the number staff in the Digital Transformation Team and the costs of that Team to be circulated to all members of the Committee	Director for Delivery, Communications and Political Governance
Figures regarding income from the new bus shelter advertising contract to be sent to all members of the Committee	Director of Finance
Information on anticipated income from the new charges for pre-planning application meetings and discussions to be sent to all members of the Committee	Director of Finance
A briefing to be provided for Members on the anticipated pressures on the Housing General Fund in relation to temporary accommodation	Director of Housing
Information on the options available, and likely implications of these, in relation to changes in relation to the current consultation on financial assessments	Strategic Director Social Care and Education

Councillor Kitterick left the meeting during consideration of this item.

33. CAPITAL BUDGET MONITORING - PERIOD 3, 2019/20

The Director of Finance submitted a report showing the position of the capital programme for 2019/20 as at the end of Period 3. The Director reminded Members that this was a rolling programme, it being unusual for a capital project to start and finish in the same year.

Members' attention was drawn to the Red rating for the Haymarket House Car Parks and Lifts project. The Director of Finance advised the Committee that there had been some delay to this project due the original contractor going in to voluntary administration. A new contractor had just been appointed.

The project consisted of a number of schemes and the contractor that had entered administration had been appointed for hotel development. This did not affect the Council financially, as this work was being funded by the owners of the Haymarket. The Car Parks scheme was progressing well.

The Committee welcomed the progress that was being made with the projects identified in the report, but noted that the forecast completion date for the Jewry Wall Museum Improvements project now was March 2021. The City Mayor confirmed that the Green rating previously reported was for the first element of the

project. Consideration was now being given to whether it would be more economical to finish the project as one scheme, or to continue it in phases.

In response to a question, the Director of Finance explained that the Finance System project related to the Council's accounting system. A new provider had been procured, due to the ending of the previous contract, but the new system had failed to meet the Council's needs. The project rating had now moved from Red to Green, as it had been possible to negotiate a new contract with the existing supplier.

It was noted that the Goscote House Demolition project was rated as Red as the difficulties of the scheme in relation to the site emerged. The method of demolition was restricted due to the compact nature of the site, so it would have to be dismantled layer by layer, making this a very complex project.

The St Leonard's Tower Block Lift project was rated as Amber, due to complexities in gaining agreements to the work being done, as some of the residents in the block were tenants and some were leaseholders. However, progress was being made towards being able to undertake this work.

The Committee queried whether modelling was still being done on the Leicester North West Major Transport Scheme. The Director of Finance advised that this referred to two schemes. The element relating to work being done on Blackbird Road / Ravensbridge Drive was nearing completion, but Leicestershire County Council was back on site at Anstey Lane / A6 to undertake further modelling. The City Mayor also advised that work still needed to be done to shape the scheme in the "five ways junction" / Woodgate area.

It also was queried why Waterside Primary School was included in the list of projects substantially completed, when the school was not nearing completion. The Director of finance advised that the project in the list referred to the feasibility study for the school, which was now substantially complete, but did not refer to the building of the school.

AGRRED:

That the position presented within the report be noted.

Action	By
The completed feasibility study for Waterside Primary School to be sent to members of this Committee when available	Strategic Director Social Care and Education

Councillor Porter left the meeting during consideration of this item

34. EQUALITY ACTION PLAN 2018/19 PROGRESS UPDATE AND DRAFT EQUALITY ACTION PLAN 2019/20

The Director of Delivery, Communications and Political Governance submitted a report providing an update on progress against actions identified in the Equality Action Plan 2018/19 and an overview of the draft refreshed Action Plan for 2019/20.

The Equalities Manager introduced the report, making the following points:

- The Action Plan would help the Council deliver inclusive and responsive services;
- Good feedback had been received from the Equality Impact Assessment (EIA) workshops held to date;
- Deaf and hard of hearing service users had been invited to use the Customer Services in Granby Street, to help identify how deaf awareness training and other recommendations could be developed and the Council's work on the British Sign Language Charter progressed. This was an ongoing area of work;
- Two important areas of focus for the coming year would be digital inclusion and the new City Listening Project;
- It was hoped to expand the successful "Don't judge a book by its cover" (human library) event. A Lived Experience Panel would support this;
- Work to address the under representation of officers from black or minority ethnic (BAME) backgrounds at the most senior levels of the Council was ongoing;
- Work also would continue to raise awareness of the guidance for supporting trans staff;
- The Plan outlined the Council's commitment to improve access to work. This included the intention to introduce a portal offer by the end of next year to enable staff to self-serve to get reasonable adjustments made to their working environment; and
- Problems previously had been experienced with obtaining information from voluntary and community services about digital support on offer in Leicester, but approaches were now being made to social workers and some mapping was being undertaken in the community.

The Committee welcomed the work being done through the Action Plan and the robust way in which equality challenges were being addressed. The offer of an EIA workshop for Chairs and Vice-Chairs also was welcomed.

It was questioned how service users could engage in digital transformation. The Equalities Manager explained that it was recognised that this was a wide subject,

so as a first stage work was ongoing to map current provision of digital services in the Council. Work also was being done on communicating with service users more effectively about the services and improving sign-posting to services. The next phase of the work would be to decide how this should be monitored.

In response to a question on how the private sector assisted people without IT skills and equipment and those experiencing language barriers, the Equalities Manager explained that various companies, such as banks, had programmes of assistance. This also could come from “social value”, which the Council now looked for in contracts it procured. In the meantime, work was underway to identify the channels currently used to reach people and the range of help that they needed. The Equalities team was working with the Smart Cities team to embed this in the latter’s work.

Some concern was expressed that, despite stated intentions to the contrary, the recruitment of senior staff from BAME backgrounds had regressed. The Director of Delivery, Communications and Political Governance advised the Committee that the City Mayor chaired a group of officers and Councillors considering BAME representation. A lot of work had been done to remove unconscious barriers from job descriptions and anonymised short listing was used. A report giving further information on this could be presented to the Committee in due course if wished.

The City Mayor confirmed that the overall composition of the Council’s workforce was generally representative of the city, but not at senior level, although it was recognised that recruitment at that level tended to be from a national pool of candidates. The Council was not complacent about this and acknowledged the need to encourage existing staff to apply for senior roles.

Members reported that feedback they received as Ward Councillors was that some residents found various barriers to accessing services. It therefore was suggested that it would be useful to have a central point to report these occurrences to, so that opportunities people were missing, or situations they were having difficulties with, could be used to inform future work. The City Mayor undertook to advise the Assistant City Mayor with responsibility for Equalities and Special Projects of this suggestion.

In summary, the City Mayor welcomed the work that was being done and thanked the Council’s employee groups for their support of it.

AGREED:

- 1) That the report be noted;
- 2) That the Director of Delivery, Communications and Political Governance be asked to provide this Committee with a report at an appropriate time on work being done to improve black and minority ethnic representation at senior officer levels in the Council;
- 3) That the Assistant City Mayor with responsibility for Equalities and Special Projects be asked to liaise with Members to consider the suggestion that a central point be established to which incidences of

people experiencing difficulties accessing aspects of the Council’s work can be reported and used to inform future work; and

- 4) That the Equalities Manager be asked to advise the Council’s employee groups of the City Mayor’s appreciation of those groups’ input to the development of Equality Action Plans.

Action	By
A report on the work being done to improve black and minority ethnic representation at senior officer levels in the Council to be made to the Committee at an appropriate time	Director of Delivery, Communications and Political Governance
The Assistant City Mayor with responsibility for Equalities and Special Projects to be asked to liaise with Members to consider the suggestion that a central point be established to which incidences of people experiencing barriers to accessing services can be reported and used to inform future work	City Mayor
The Council’s employee groups to be advised of the City Mayor’s appreciation of those groups’ input to the development of Equality Action Plans	Equalities Manager

35. SCRUTINY COMMISSIONS' WORK PROGRAMMES

a) The Viability of a Community Lottery

The Committee was asked to receive and endorse the Scoping Document for a review to consider the viability of a Community Lottery. The Chair of the Neighbourhood Services Scrutiny Commission stressed that this review would be considering the viability of such a lottery and options available, to inform a future decision on whether to proceed with introducing one.

The Committee welcomed the inclusion of the ethical and social aspects of operating a lottery in the review, particularly in view of concerns that gambling was a problem for some people.

Some concern was expressed that close attention needed to be paid to the equalities implications of introducing a lottery, as there was a view that lotteries were a tax on less affluent people to fund services for those people. This needed to be reflected in the research undertaken during the proposed review.

AGREED:

That the Scoping Document for a review to consider the viability of a Community Lottery be endorsed, subject to the Neighbourhood Services Scrutiny Commission being asked to amend the title of the review to refer to the viability and appropriateness of a Community Lottery.

Action	By
The Neighbourhood Services Scrutiny Commission to be asked to amend the title of its proposed review to refer to the viability and appropriateness of a Community Lottery	Chair of Neighbourhood Services Scrutiny Commission

b) Economic Development at Local Level

The Chair of the Economic Development, Transport and Tourism Scrutiny Commission reported verbally that the Commission was preparing to undertake a review of the development of job creation, skills and investment plans for parts of Leicester that were economically excluded, including opportunities for local businesses and for young people to engage in positive activities. It was hoped that work on this review could start before the next scheduled meeting of the Overview Select Committee, so it was intended that Scoping Document would be circulated to the Committee in advance of its next meeting.

AGREED:

That the review of Economic Development at Local Level be supported in principle.

36. OVERVIEW SELECT COMMITTEE WORK PROGRAMME

The Committee received and considered its current work programme.

AGREED:

- 1) That the work programme be noted; and
- 2) That a Special Meeting of the Committee be held at an appropriate time to receive a presentation on the main Local Plan issues prior to consultation on the full detailed draft Plan.

Action	By
A Special Meeting of this Committee to be arranged to consider the main Local Plan issues prior to consultation on the full detailed draft Plan	Democratic Support Officer

37. CLOSE OF MEETING

The meeting closed at 7.32 pm



Leicester
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WARDS AFFECTED
All Wards - Corporate Issue

FORWARD TIMETABLE OF CONSULTATION AND MEETINGS:
Overview Select Committee

28 November 2019

Tracking of Petitions - Monitoring Report

Report of the Monitoring Officer

1. Purpose of Report

To provide Members with an update on the current status of responses to petitions against the Council's target of providing a formal response within 3 months of being referred to the Divisional Director.

2. Recommendations

The Committee is asked to note the current status of outstanding petitions and to agree to remove those petitions marked 'Petition Process Complete' from the report.

3. Report

The Committee is responsible for monitoring the progress and outcomes of petitions received within the Council. An Exception Report, showing those petitions currently outstanding or for consideration at the current Overview Select Committee meeting is attached at Appendix B1.

The Exception Report contains comments on the current progress on each of the petitions. The following colour scheme approved by the Committee is used to highlight progress and the report has now been re-arranged to list the petitions in their colour groups for ease of reference:

- **Red** – denotes those petitions for which a pro-forma has not been completed within three months of being referred to the Divisional Director.
- **Petition Process Complete** - denotes petitions for which a response pro-forma has sent to the relevant Scrutiny Commission Chair for comment, subsequently endorsed by the Lead Executive Member and the Lead Petitioner and Ward Members informed of the response to the petition.

- **Green** – denotes petitions for which officers have proposed a recommendation in response to a petition, and a response pro-forma has been sent to the relevant Scrutiny Commission Chair for comment, before being endorsed by the Lead Executive Member.
- **Amber** – denotes petitions which are progressing within the prescribed timescales, or have provided clear reasoning for why the three-month deadline for completing the response pro-forma has elapsed.

In addition, all Divisional Directors have been asked to ensure that details of **all** petitions received direct into the Council (not just those formally accepted via a Council Meeting or similar) are passed to the Monitoring Officer for logging and inclusion on this monitoring schedule.

4. Financial, Legal and Other Implications

There are no legal, financial or other implications arising from this report.

5. Background Papers – Local Government Act 1972

The Council's current overall internal process for responding to petitions.

6. Consultations

Staff in all teams who are progressing outstanding petitions.

7. Report Author

Angie Smith
Democratic Services Officer
Tel: 0116 454 6354

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Date Petition referred to Divisional Director	Received From	Subject	Type - Cncr (C) Public (P)	No. of Sig	Ward	Date Receipt Reported to Council (C) / Committee (Cttee)	Lead Divisional Director	Current Position	Scrutiny Chair Involvement	Date of Final Response Letter Sent to Lead Petitioner	Current Status	Ref. No.
29/05/2019	Ms Lou Harrison, Headteacher	Petition requesting a safe place to cross outside King Richard III Infant and Nursery School	(p)	161	Westcotes		Andrew L Smith	The site was surveyed in 2015. It has been assessed and ranked against other pedestrian crossing requests. The site did not score highly compared with other requests as the traffic levels are low (95 vehicles in the peak 8-9am hour). The area is on the 20mph zone list for 2019/20 financial year. The site has been referred to the School Run Parking and Road Safety programme and a plan is being developed. Officers will be discussing ways to make the existing crossing more visible with other officers shortly. Any measures will hopefully be in place before the start of the 2019/20 academic year.	Proforma returned by the Scrutiny Chair	30/09/2019	PETITION COMPLETE	19/5/03
10/05/2019	Yasmin Kassamali	Petition to have residents parking on and around St Saviours Road / Margaret Road / Constance Road / Copdale Road / Sidwell Street / Clumber Road / Kitchener Road	(p)	54	North Evington / Spinney Hills		Andrew L Smith	The request for a Residents' Parking Scheme will be added to the report to the City Mayor regarding the next priority list for a scheme. In the meantime the survey of parked cards will be completed and checked with Next re. possible commuter parking in breach of their incentive scheme. A meeting will also be arranged iwth Next regarding parking issues in the area.	Proforma returned by the Scrutiny Chair	20/09/2019	PETITION COMPLETE	19/5/01
12/03/2019	Martin Buchanan	Petition to allow Beaumont Lodge Neighbourhood Centre to be transferred as an asset to the residing charity Beaumont Lodge Neighbourhood Association CIO	(p)	14 Paper 198 E-Petition	Beaumont Leys	Petition to be presented to Full Council 21/3/19 - Mr Martin Buchanan	Matt Wallace	The City Mayor and Ward Councillors have been consulted on the matter. With the imminent Ashton Green development being undertaken in close proximity to the asset in question, a transfer at this time could potentially disrupt future opportunity that the wider development could bring to the asset, development that could generate even greater benefit to the community and therefore withholding from any asset transfer at present seems the sensible option to take until the Ashton Green development has progressed further. The Council's Course of action therefore is to refuse the asset to be transferred to the Beaumont Lodge Neighbourhood Association CIO.	Proforma returned by the Scrutiny Chair	FINAL LETTER AWAITED	GREEN	19/03/02

RED - Pro-forma not completed within 3 months of being referred to Divisional Director

PETITION PROCESS COMPLETE - Scrutiny Chair commented on Pro-forma, Lead Executive Member signed off response and final letter sent to Lead Petitioner.

GREEN - Lead Executive Member consulted on proposed response and Pro-forma sent to Scrutiny Chair

AMBER - Petition response progressing within 3 months of being referred to Divisional Director

Date Petition referred to Divisional Director	Received From	Subject	Type - Cncr (C) Public (P)	No. of Sig	Ward	Date Receipt Reported to Council (C) / Committee (Ctee)	Lead Divisional Director	Current Position	Scrutiny Chair Involvement	Date of Final Response Letter Sent to Lead Petitioner	Current Status	Ref. No.
10/06/2019	Miss Rosie Antunes	Petition for action regarding the ongoing problem with the parking of non-residential vehicles on Badgers Close predominantly during the school hours and safety issues.	(p)	35	Beaumont Leys	Petition presented by Cllr Dempster to Full Council 13/6/19	Andrew L Smith	Actions considered are: restricted parking scheme; single yellow line restricting parking at school pick-up and drop-off times; extension of existing double yellow lines around junction of Badgers Close with Beauville Drive. Of these options the residents parking scheme and single yellow line options will affect the residents living in the area at all times and not just the times that parents pick up and drop off their children. There is an annual charge for a permit in a residents parking area which may not be popular with all residents. Furthermore, there is off road parking available to many residents of Badgers Close so a residents parking scheme will not bring any benefits outside of school pick up and drop off times. Neither single yellow lines nor a residents parking scheme will prevent parents boarding and alighting their children at the kerbside. The existing double yellow lines on the corner of Badgers Close and Beauville Drive stop part way round the radius. These could be extended to prevent parking close to the junction and obstructing the sight lines for	Proforma returned by the Scrutiny Chair	FINAL LETTER AWAITED	GREEN	19/6/01
26/07/2019	Smita Jagdish Patel	Petition re. issues at Cossington Street Swimming Pool: 1/ changes in payment method 2/ time reduction of lunch time swimming 3/ 1/3 swimming pool taken back during ladies session on Saturday 9-10am 4/ deterioration of cleanliness and staff duties 5/ first aid facility and equipment in gym	(p)	82	Belgrave		Ivan Browne	Recommended response: - acknowledge the numerous points of concern raised; - provide information on direct debit payments for over-60 membership; - explain the changes to the swimming pool programme and improve communication of changes to customers in the future; provide reassurance that the points raised around cleanliness have been responded to with an improved cleaning schedule within the poolside area; - highlight the planned gym development for the Sports Hall to expand the gym and complete a full replacement of existing equipment to improve the service for customers. To maintain the recent changes for over-60 membership across the leisure centres, this provides numerous options for gym, swim, classes and racquets access: - £3 per day, pay as you go - £10 per month, direct debit - £120 annual	Proforma returned by the Scrutiny Chair	FINAL LETTER AWAITED	GREEN	19/7/02

RED - Pro-forma not completed within 3 months of being referred to Divisional Director

PETITION PROCESS COMPLETE - Scrutiny Chair commented on Pro-forma, Lead Executive Member signed off response and final letter sent to Lead Petitioner.

GREEN - Lead Executive Member consulted on proposed response and Pro-forma sent to Scrutiny Chair

AMBER - Petition response progressing within 3 months of being referred to Divisional Director

Date Petition referred to Divisional Director	Received From	Subject	Type - Cncr (C) Public (P)	No. of Sig	Ward	Date Receipt Reported to Council (C) / Committee (Cttee)	Lead Divisional Director	Current Position	Scrutiny Chair Involvement	Date of Final Response Letter Sent to Lead Petitioner	Current Status	Ref. No.
31/07/2019	Kishore Bhojak	Parking issues at Belgrave NC	(p)	27	Belgrave		John Leach	Proposed to undertake a full survey of BNC with regard to the centre car park. This approach is supported by the lead petitioner and by the ward councillors who have been consulted as part of the formal process. The purpose of the survey will be to establish the extent of the issue identified with regard to use of the centre car park by non-users and the impact this has on the centre users. The survey will also assess the appetite for potential actions including the possible installation of new signs and a maximum parking duration, as well as relining the car park to provide a higher ration of disabled parking bays. Centre users will also be asked to comment on potential enforcement options and to suggest any other potential options. The results of the survey will be made available to centre users and will be used to consider any further actions.	Proforma returned by the Scrutiny Chair	FINAL LETTER AWAITED	GREEN	19/7/03
08/08/2019	Mitesh Patel	Harrison Road Parking Scheme - Flax Road residents want to be included	(p)	37	Rushey Mead		Andrew L Smith	Action proposed is to carry out a formal consultation with Flax Road residents on installing a residents' parking scheme (RPS) on Flax Road. A similar consultation is planned for nearby Stafford Street as a result of a petition presented in 2016. It is proposed that the two consultations are run concurrently and using similar venues and resources. NB: works to improve nearby parking and pedestrian safety are already planned in the Harrison Road area (likely early next year). It is proposed that these works will include any RPS proposals agreed with residents of Flax Road and Stafford Street.	Proforma sent to the Scrutiny Chair		GREEN	19/8/01
19/08/2019	Deoniso Rosario	Request that communal benches be removed from Sandpiper Close to prevent ASB	(p)	18	North Evington		Chris Burgin	From consultation carried out it is evident that there is not overwhelming support for the removal of the benches. Neither is there any evidence provided by the Police or incidents recorded that evidence the alleged ASB. The courtyard improvements to include the installation of the benches was carried out 5 years ago. Most of the residents at that time consented for the improvement. The Housing Officer carried out consultation and there were more residents in favour that the benches remained than were in favour of removal. It was recommended the benches remain and the Housing Officer continues to monitor the situation and refers should the situation change.	Proforma returned by the Scrutiny Chair	Final letter awaited	GREEN	19/8/02
05/09/2019	Karanjit Sandhu	Request for an Exercise Bike to be installed on Evington Park	(p)	27	Evington		John Leach	Petition sent to Divisional Director			AMBER	19/9/01

RED - Pro-forma not completed within 3 months of being referred to Divisional Director

PETITION PROCESS COMPLETE - Scrutiny Chair commented on Pro-forma, Lead Executive Member signed off response and final letter sent to Lead Petitioner.

GREEN - Lead Executive Member consulted on proposed response and Pro-forma sent to Scrutiny Chair

AMBER - Petition response progressing within 3 months of being referred to Divisional Director

Date Petition referred to Divisional Director	Received From	Subject	Type - Cncr (C) Public (P)	No. of Sig	Ward	Date Receipt Reported to Council (C) / Committee (Ctee)	Lead Divisional Director	Current Position	Scrutiny Chair Involvement	Date of Final Response Letter Sent to Lead Petitioner	Current Status	Ref. No.
16/09/2019	Kashif Munir (via Keith Vaz MP)	Parking issues arising from traffic calming measures i.e. double yellow lines on Gainsford Road and Highwood Drive near Falcolns Primary School	(p)	11	Troon		Andrew L Smith	Petition sent to Divisional Director			AMBER	19/9/02
18/09/2019	Warren Mason	Petition requesting a secure parking area for residents on Tudor Close	(p)	14	Fosse	Petition to be presented to Full Council 3/10/19 - Cllr Waddington	Andrew L Smith	Petition sent to Divisional Director			AMBER	19/9/03
27/09/2019	Mrs Saadia Siddique	Petition requesting an area on Farnham Street be converted to parking bays	(p)	154	North Evington		Andrew L Smith	Petition sent to Divisional Director			AMBER	19/9/04
27/09/2019	Ms Reba Taylor	Petition requesting the Council develop sustainable parking solutions for residents at Hassal Road / Falconer Crescent junction	(c)	25	Western	Petition to be presented to Full Council 3/10/19 - Cllr Cole	Andrew L Smith	Petition sent to Divisional Director			AMBER	19/9/05
17/10/2019	Mr Hafiz Patel	Petiiton to remove a single yellow line in Baggrave Street	(p)	32	North Evington		Andrew L Smith	Petition sent to Divisional Director			AMBER	19/10/01

RED - Pro-forma not completed within 3 months of being referred to Divisional Director

PETITION PROCESS COMPLETE - Scrutiny Chair commented on Pro-forma, Lead Executive Member signed off response and final letter sent to Lead Petitioner.

GREEN - Lead Executive Member consulted on proposed response and Pro-forma sent to Scrutiny Chair

AMBER - Petition response progressing within 3 months of being referred to Divisional Director



Overview Select Committee

Date of meeting: 28th November 2019

Draft Leicester Local Plan (2019 – 2036) - Public Consultation

Report of the Director of Planning, Development and Transportation

Useful information

- Ward(s) affected: all
- Report author: Fabian D'Costa
- Author contact details: 0116 454 2974
- Report version number: 1

1. Summary

The report outlines the main strategies and policies of the draft local plan for public consultation in January/February 2020.

2. Recommendations

That the key local plan strategies and policies, and provisions for consultation be noted and comments passed to the Director of Planning, Development and Transportation for consideration.

3. Draft Local Plan

3.1 Background

The National Planning Policy Framework (NPPF) requires all local planning authorities to produce a local plan. In view of this, officers have been working on a new plan which will replace the current core strategy (2014) and saved policies from the previous local plan of 2006.

The draft plan will cover the period 2019 – 2036 and seeks to:

- Meet the needs for homes, jobs, shopping, and leisure;
- Allocate sites for development including strategic development sites; and
- Set clear planning policies that guide decisions on planning applications

The replacement local plan process involves a number of stages before the plan is ultimately adopted by the council. Following on from previous consultations, the council is now in a position to publish a draft plan for public consultation. The plan will be supported by various evidence documents and assessments, including an Equality Impact Assessment.

The plan also needs to be viable and deliverable and should not be a burden on development.

3. 2 Key Strategies and Policies in the draft Local Plan

- Housing need for the city over the plan period is 29,104. Supply of land is proposed as follows:

Strategic Sites

- Former Western Park Golf Course (LCC) – Including employment and open space
 - East of Ashton Green (LCC) – Including employment and open space
 - Land North of A46 bypass (LCC/Private) – Including open space
 - Land at Billesdon Close and the Paddock (Private)
 - Leicester General Hospital (Private)
- 85 other sites will be allocated for housing and a large number of dwellings will also be provided on city centre and brownfield sites within the Central Development Area (CDA).
 - The Central Development Area (CDA) will provide around 4900 dwellings to contribute towards housing supply but also focus on retailing, culture, leisure and entertainment.
 - However, there will still be an insufficient supply of land, which means there will be a shortfall of 7,813 dwellings which will be distributed through agreement with district councils
 - Officers have carried out a detailed analysis of areas (e.g. building heights, local character, heritage assets) within the CDA which has identified 9 key character areas and 4 'other' areas, each with their own objectives.
 - Employment – To meet 45ha employment need, new sites are allocated at the former Western Park Golf course, East of Ashton Green, and Beaumont Park. The city centre will still be a focus for offices.
 - Open Space – Balance between housing, employment and open space. Some green wedge will be lost and public open space reduced. However, there will be opportunities to secure new open space on strategic sites and enhance the quality of existing public open space.
 - Transport – The plan will support the emerging local transport plan, which includes improving key transport hubs, providing a fast and efficient bus network, and promoting walking and cycling.

3.3 Key planning policies that planning applications will be judged against.

- Climate Change – Includes air quality, transport, energy and flooding
- Health and Wellbeing – Good design, open spaces, employment, cycling and walking
- Internal Space Standards – City wide
- Affordable Housing - 30% on greenfield sites
- Policies in relation to Houses in Multiple Occupation (HMO's), student housing and retention of family housing
- Delivering Quality Places – Includes tall buildings, landscaping, shopfronts, and protecting residential amenity
- Policies to preserve heritage assets and to support tourism in the city
- Maintaining and enhancing the quality of open space
- Protecting designated bio-diversity sites and support for net gain (awaiting government guidance)
- Policies to protect existing sports pitches and support for new ones
- Support the city's retail hierarchy and leisure and cultural facilities

3.4 Local Plan Timetable

Subject to emerging Government policy and any associated changes in plan making requirements, the current timetable for the local plan is as follows:

- Issues and Options - Public Consultation (Complete)
- Emerging Options, Sites and Development Management Policies – Public Consultation (Complete)
- Full Council 16th January 2020

- Public Consultation to commence end of January/Early February 2020
- Submission Local Plan Consultation – Summer 2020
- Public Examination Autumn 2020
- Adoption 2021

4. Public Consultation

Officers have recently revised the Statement of Community Involvement (SCI) document, which sets out how we will involve the public, developers, businesses and other agencies in the preparation of the council's planning policy documents.

It is intended to use a variety of methods of communication for consultation on the local plan. These include letters and e-mails, press releases, exhibitions, workshops and the internet to ensure that there is appropriate public consultation and participation.

5. Financial, legal and other implications

5.1 Financial implications

There are no direct financial implications from this report as support for the development of the Local Plan is being resourced through existing staffing and operational budgets.

Paresh Radia – Finance.

5.2 Legal implications

There are no legal implications directly arising from this report as it simply outlines the main strategies and policies of the draft local plan for public consultation. Any changes to planning policy will be brought into effect by the formal local plan process in due course.

Clare Sinnott, Solicitor (Commercial, Property and Planning Team) (ext. 37 1408)

5.3 Climate Change and Carbon Reduction implications

Land use and development have been identified as key factors which will affect Leicester's ability to respond to the climate emergency declared on 1st February 2019. The Local Plan therefore represents an important opportunity to ensure that, as far as possible within the legal framework set by central government, including for the viability of development, changes to the city's land use and built environment support the necessary rapid progress towards carbon neutrality and climate-adaptation.

The Committee should note that the council's proposals for responding to the climate emergency include "Land use, green space and development" as one of six key themes. Public consultation on these is currently underway until 9th February 2020. They are being considered by the Economic Development, Transport and Tourism Scrutiny Commission on 4th December. It is also proposed to bring them to the Housing Scrutiny Commission and the Overview Scrutiny Committee.

Duncan Bell, Corporate Environmental Consultant. Ext. 37 2249

5.4 Equalities Implications

Under the Equality Act 2010, public authorities have a Public Sector Equality Duty (PSED) which means that, in carrying out their functions, they have a statutory duty to pay due regard to the need to eliminate unlawful discrimination, harassment and victimisation, to advance equality of opportunity between people who share a protected characteristic and those who don't and to foster good relations between people who share a protected characteristic and those who don't.

Protected Characteristics under the Equality Act 2010 are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation.

Meaningful consultation on the local plan will be an important method of collating evidence around any potential equalities implications and should aid the authority in paying due regard to the aims of the PSED. The local plan is a high-level document. In order to foster a meaningful approach to assessing the equalities impacts, in the initial stages a high-level assessment of potential equalities implications is being undertaken to indicate the key issues and where more intensive focus is required in the following stages of local plan development.

Therefore, prior to a final decision on the local plan in 2021, at the next 'submission' stage of consultation in summer 2020, a more detailed impact assessment on policies will be undertaken drawing upon equality information and the results of consultation and engagement activity. Building an evidence base is a vital part of equality impact assessment and should include protected characteristic groups (through established groups, support organisations and individually as part of a representative sample of consultees) and other groups at risk of exclusion. A key part of this will be understanding how current policies and issues affect different groups. This will be an iterative process and should be undertaken in such a way that equalities considerations influence the final decision.

Where disproportionate negative impacts on any protected characteristic/s are identified, decision makers must consider steps to mitigate those impacts. It is important that, throughout the process of decision making, decision makers are aware of and act upon their duty to pay due regard to the PSED.

5.5 Other Implications (You will need to have considered other implications in preparing this report. Please indicate which ones apply?)

None applicable

6. Background information and other papers:

Appendix C1 - Local Plan Presentation

Draft Leicester Local Plan (2019 – 2036) for Public Consultation

Overview Select Committee - 28th November 2019

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Appendix C1



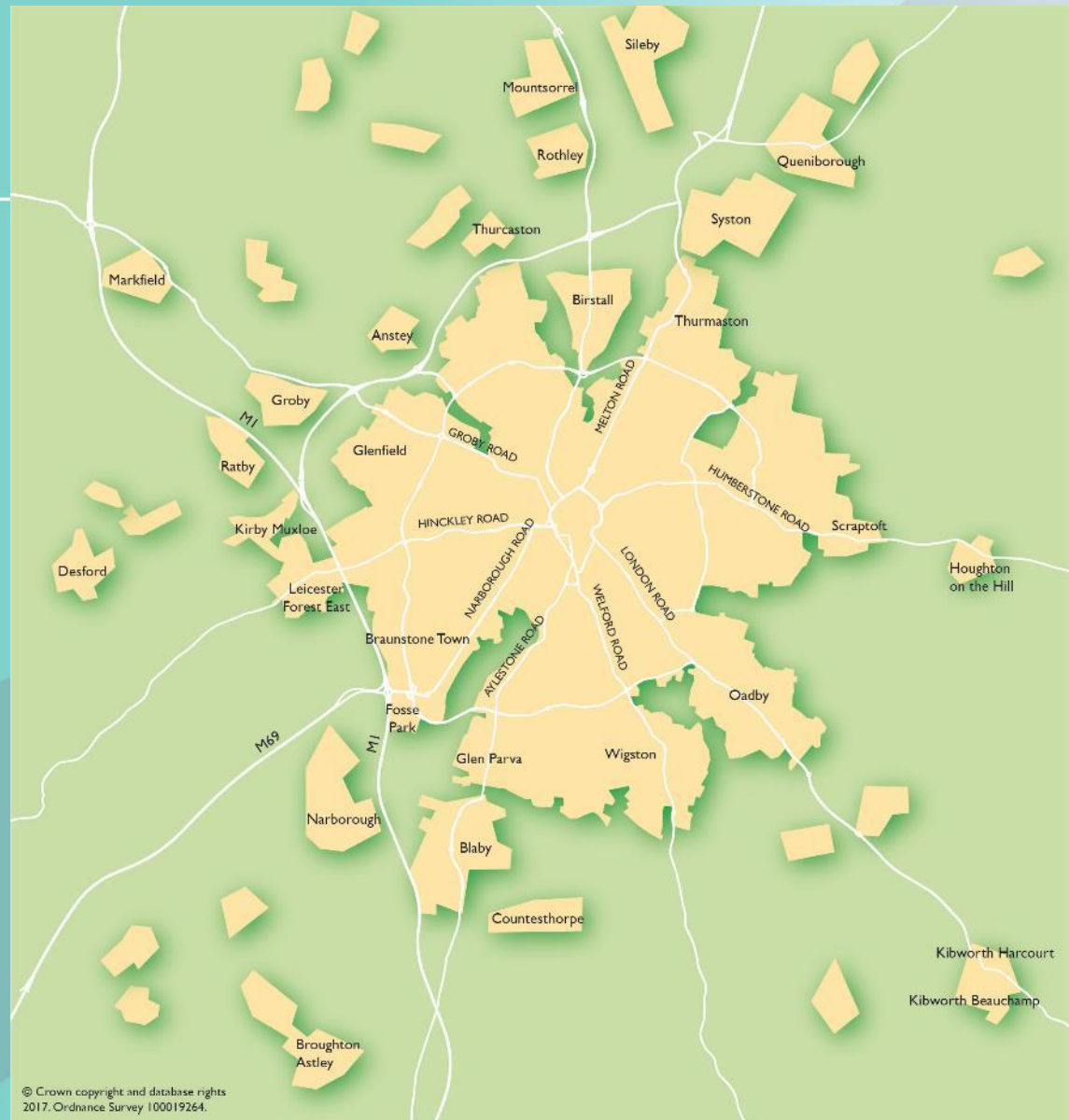
The Importance of a Local Plan

Draft Local Plan for public consultation has been produced

- Plan will cover the period 2019 – 2036 and seeks to:
 - Meet the needs for homes, jobs, shopping, and leisure
 - Allocate sites for the above
 - Set the council's planning policies (e.g. Climate Change and Public Health)
 - Encourage Investment & Economic Growth
 - Facilitate Place-making and set high quality design expectations
- It also includes specific policies to consider planning applications
- The Plan needs to be evidenced as viable and deliverable

A Growing City

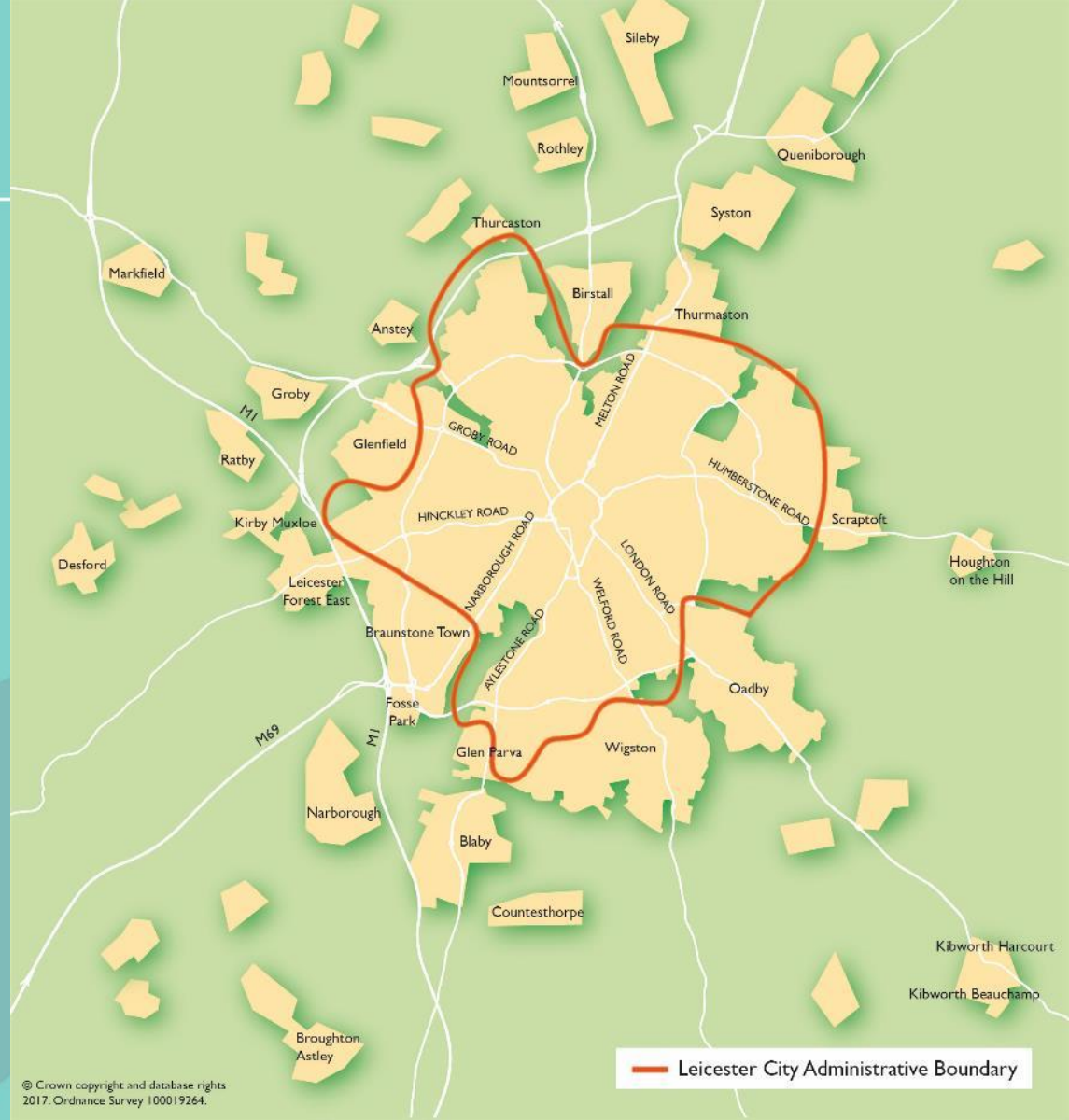
31



A Growing City

- Leicester has already grown through the boundary and will continue to do so
- Strategic Growth Plan – approved to shape the future of Leicester and Leicestershire to 2050
- Recognises c 1/3 City growth may need to be redistributed to Districts

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Housing Strategy

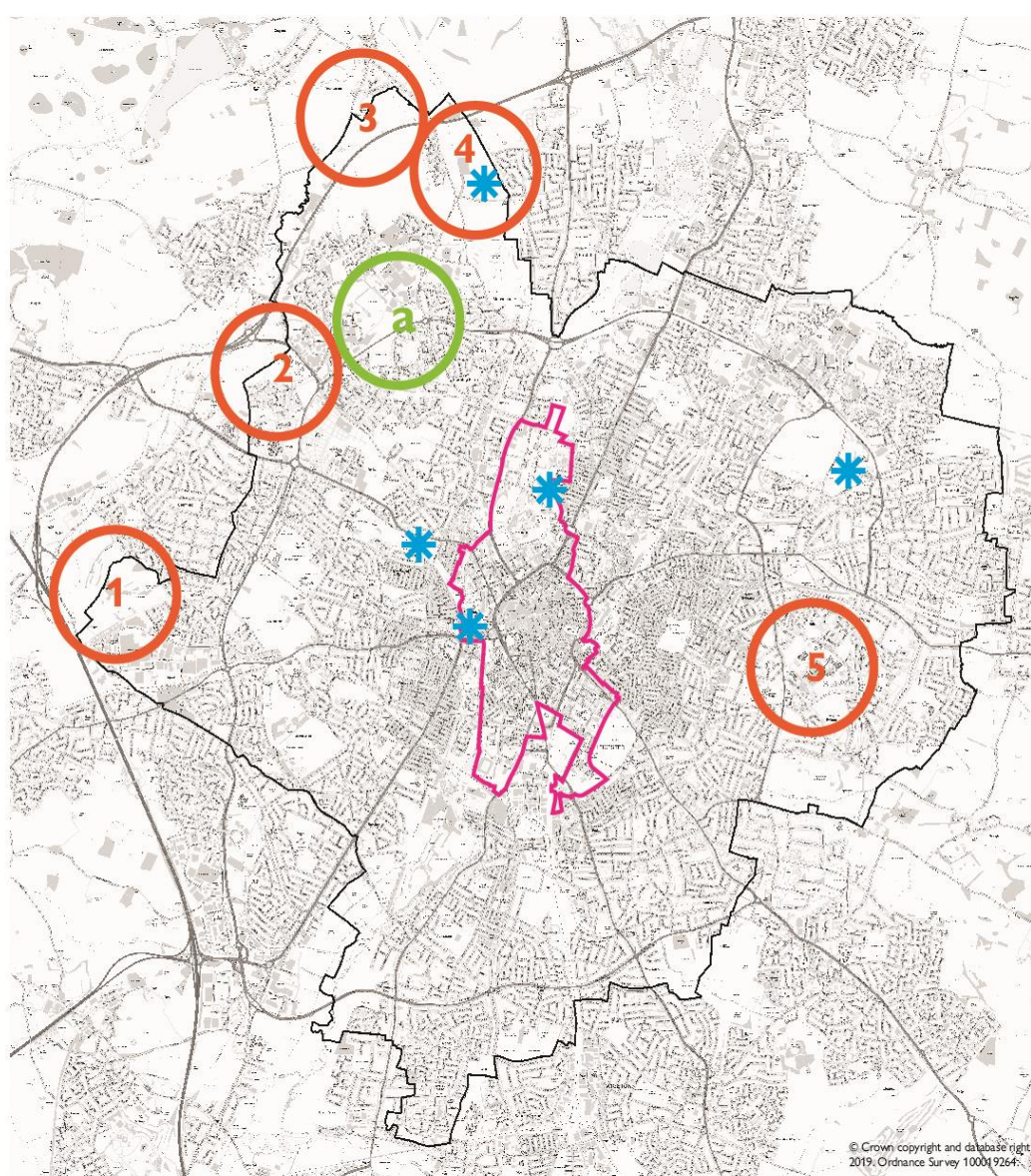
- Housing Need -1,712 a year until 2036
- 29,104 dwellings over plan period
- Any unmet need will need to be redistributed to adjacent districts and agreed through a Statement of Common Ground

33



Housing Strategy – Draft Allocations

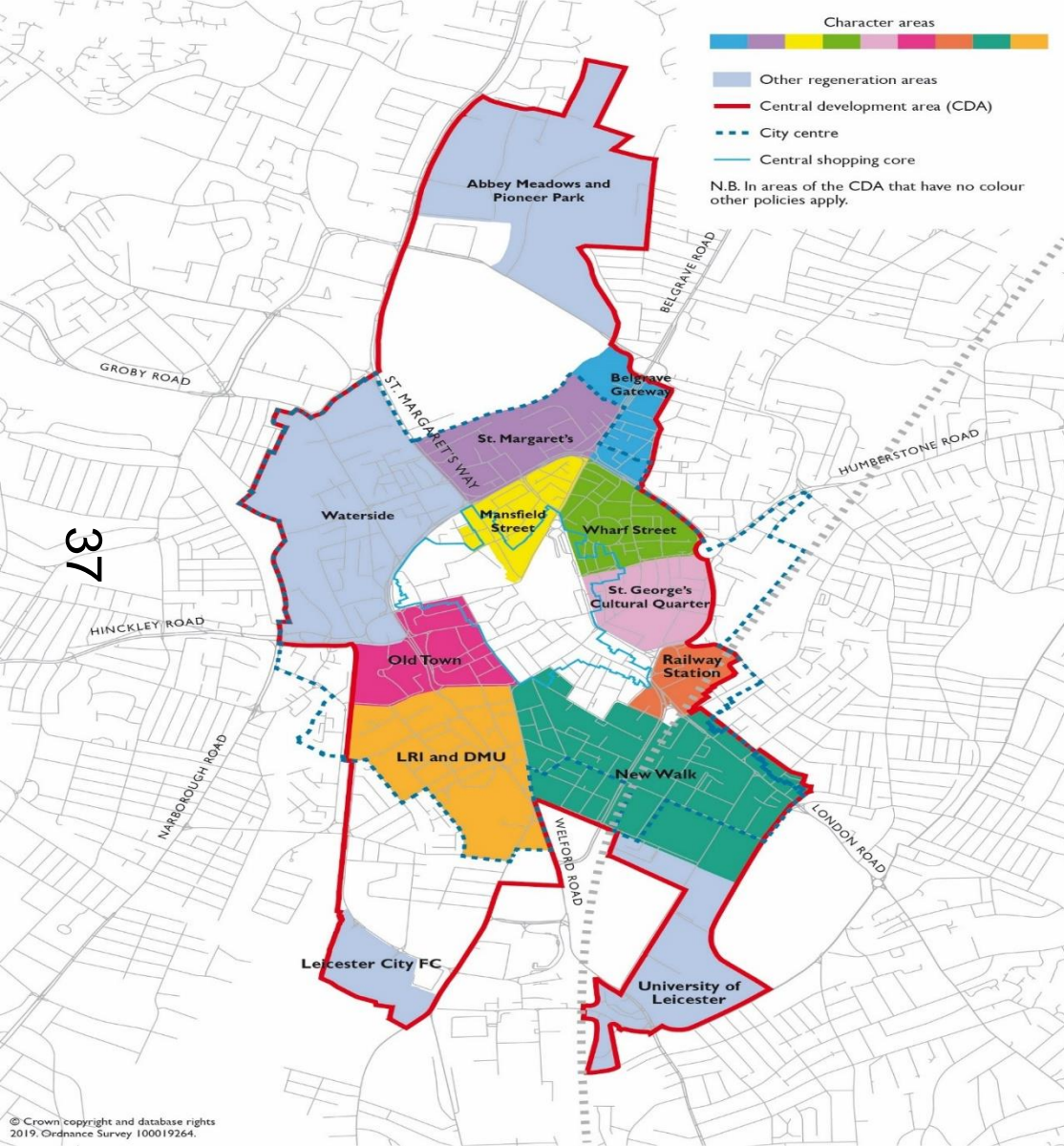
- 5 Strategic Sites
 - Former Western Park Golf Course (LCC ownership – Housing/Open Space/Employment)
 - East of Ashton Green (LCC ownership – Includes Open Space/Employment)
 - North of A46 bypass (LCC/Private ownership – Including Open Space)
 - Land at Billesdon Close and Paddock (Private ownership)
 - Leicester General Hospital (Private ownership)
- Approximately 85 other sites for housing (Mix of LCC and Privately owned sites)
- Central Development Area (CDA) – City Centre and Brownfield Sites
- Other Allocations – Education, Gypsy and Travellers and Red Hill Roundabout



- Central development area
- Strategic housing site
 1. Western Golf Course
 2. Land West of Anstey Lane
 3. Land North of A46 Western Bypass
 4. Land East of Leicester Road
 5. Land at Leicester General Hospital
- Strategic employment site
 - a. Land at Beaumont Park
- ✱ Proposed new school allocation

Housing Strategy

- Housing need 29,104 dwellings
- Anticipated Supply identified in the Plan – 21,291 dwellings
- **Shortfall – 7,813 to be redistributed through agreement with the district councils**

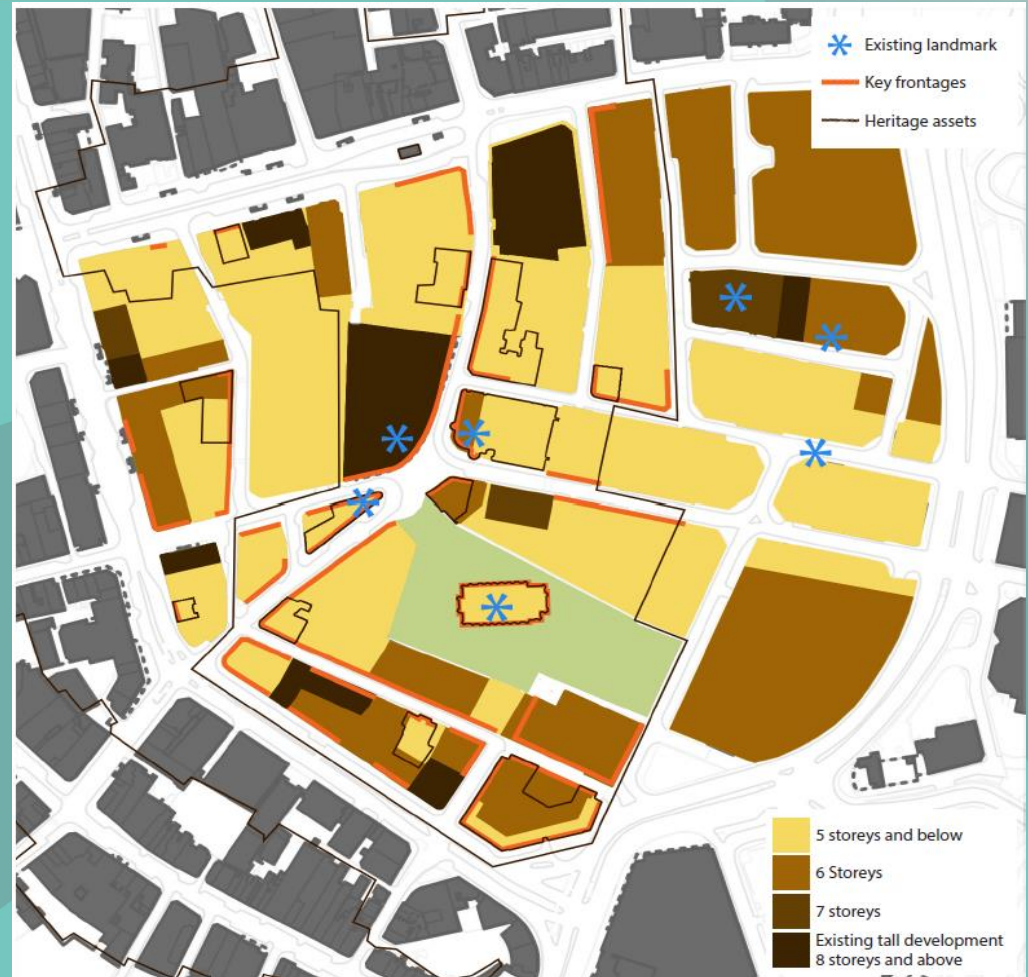


Central Development Area (CDA)

- Providing around 4900 dwellings
- Also focus for commerce, retailing, culture, leisure and entertainment
- Character Areas defined
- Protect and enhance Historic Environment

Example of Character Area Detailed Guidance: St Georges

- More detailed considerations across Character area
- 38 Consider local character, heritage assets, existing heights etc.
- Considers development potential including heights



Key Strategy - Employment

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- Employment Need – 45 Ha for light/general industry and small scale storage
- 45,000 sqm offices
- Large scale warehousing/storage provided mainly in districts



Employment Draft Allocations

- New Employment sites at Western Park Golf Course (Part), East of Ashton Green (Part), and Beaumont Leys Park.
- 40 New Offices at two new sites – Around Railway Station and land around Phoenix Square
- City Centre still the focus for Offices



Key Strategy – Open Space

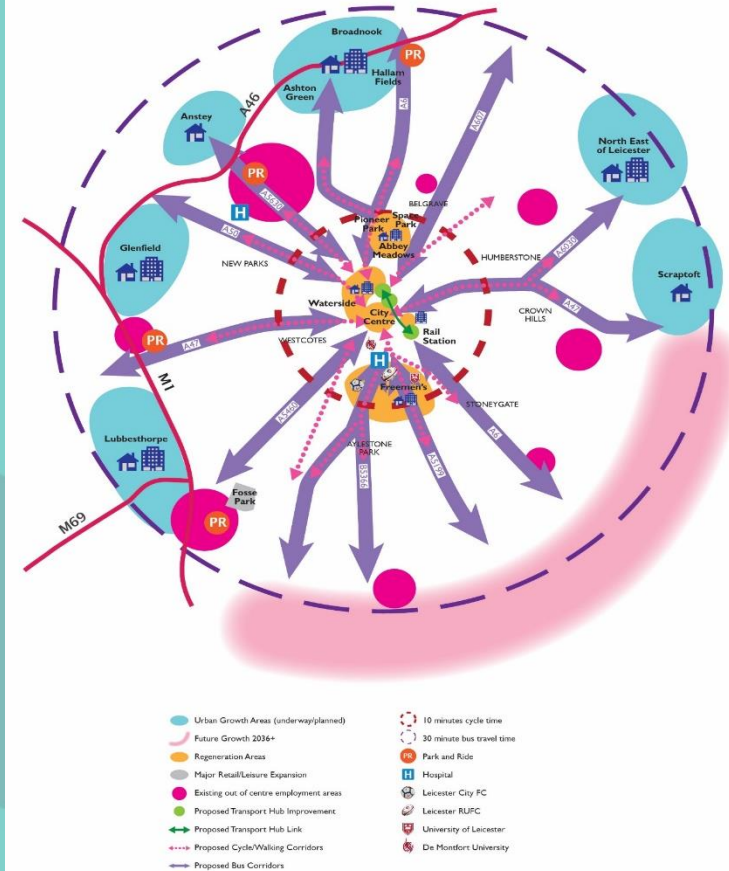
- Balance between Housing, Employment and Public Open Space
- Combination of population growth and planned development will mean that some green wedge will be lost and quantity of public open space will be reduced
- However, opportunities to secure new public open space on Strategic Sites and improve existing public open space

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Key Strategy – Transport

- Links to Leicester's emerging Local Transport Plan and Transforming Cities Programme
- Improving main transport hubs and the connections between them
- 42 • Fast, efficient, and enhanced bus network
- Promoting walking, cycling and sustainable transport
- Improving Leicester's Air Quality
- Supporting future transport Improvements including road and rail



Key Policies in Draft Local Plan

- Climate Change – policies will contribute in an integrated way including Air Quality, SuDs, flooding, transport, energy.
- 43 Health and Wellbeing – Crossover with other policies. e.g. Good Design, Open Spaces, Employment, Transport
- Affordable Housing: 30% on greenfield sites
- Internal Space Standards - City wide
- Houses in multiple Occupation/Student Housing /Retention of Family Homes



Key Policies in Draft Local Plan

- Delivering Quality Places – Tall Buildings, Inclusive design, backland development
- 44 Heritage – Preservation of Archaeology and City's Heritage Assets
- Culture and Tourism – includes Great Central Railway Museum and Places of Worship



Key Policies in Local Plan

- St Georges Quarter – Policy to build on success of arts, cultural industries in this particular area
- Neighbourhood Employment Areas – Protect smaller areas of employment land which are usually within residential areas
- Retailing – Policies to support City Centre, District and Local Centres. Support for Leisure and Cultural facilities

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Key Policies in Local Plan

- Open Space – Maintain and enhance the quality of open space network (including s106)
- 46 • Biodiversity Gain – Protection of existing designated sites and support for net gain – subject to Government guidance
- Protection of existing sports pitches and support for new facilities



Timetable

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- Issues and Options - Public Consultation
- Emerging Options, Sites and Development Management Policies – Public Consultation
- Full Council 16th January 2020
- Public Consultation to commence end of January/Early February 2020
- Submission Local Plan Consultation – Summer 2020
- Public Examination Autumn 2020
- Adoption 2021





Revenue Budget Monitoring April-September, 2019/20

Decision to be taken by: City Mayor
Overview Select Committee date: 28th November 2019
Lead director: Alison Greenhill

Useful information

- Ward(s) affected: All
- Report author: Amy Oliver
- Author contact details: Ext 37 5667

1. Summary

This report is the second in the monitoring cycle for 2019/20 and forecasts the expected performance against the budget for the year.

As has been the case for many years now, the scale of Government funding cuts means departments are under pressure to provide services with reduced funding, and this often results in budget difficulties which need to be managed.

This year several councils are reporting a forecast overspend in 2019/20 and imposing emergency spending controls in response. It is therefore positive to note that the Council is forecasting it will not overspend its budget. Both adults and children's social care services can manage within their resources in 2019/20. Nonetheless, the budget this year masks significant pressures: - (a) growth in the costs of looked after children, which can only be funded through one-off resources provided by the budget. This will be addressed further as part of the 2020/21 budget; (b) continued upward pressure in demand for adult social care which may or may not be addressed by future government action.

It is therefore important we continue to achieve the Spending Review targets to ensure we work towards balancing our budget in future years.

City Development and Neighbourhoods are continuing to see pressures, although they are forecasting to manage individual overspends within their divisional budgets and by calling on the departmental reserve.

It is our usual practice to use this report to seek Executive approval to budget reductions arising from savings achieved by means of management action (i.e. those that do not need formal approval to the course of action proposed). These are shown in a separate appendix (Appendix C) and represent a further £1m p.a savings.

2. Recommendations

2.1 The Executive is recommended to:

- Note the emerging picture detailed in the report;
- Approve the budget reductions arising from achieved spending review savings, as detailed in Appendix C of this report;

2.2 The OSC is recommended to:

- Consider the overall position presented within this report and make any observations it sees fit.

3. Supporting information including options considered:

The General Fund budget set for the financial year 2019/20 was £263.9m.

Appendix A summarises the budget for 2019/20;

Appendix B provides more detailed commentary on the forecast position for each area of the Council's operations;

Appendix C details the budget amendments required, consequent to spending review savings; and

4. Financial, legal and other implications

4.1 Financial & Legal implications

This report is solely concerned with financial issues.

Alison Greenhill, Director of Finance, Ext 37 4001

4.2 Climate Change and Carbon Reduction implications

This report is solely concerned with financial issues.

4.3 Equality Impact Assessment

No Equality Impact Assessment (EIA) has been carried out as this is not applicable to a budget monitoring report.

4.4 Other Implications

Other implications	Yes/No	Paragraph referred
Equal Opportunities	No	-
Policy	No	-
Sustainable & Environmental	No	-
Crime & Disorder	No	-
Human Rights Act	No	-
Elderly/People on low income	No	-
Corporate Parenting	No	-
Health Inequalities Impact	No	-

No other implications are noted as this is a budget monitoring report, and therefore no policy changes are proposed.

5. Background information and other papers.

Report to Council on the 20th February 2019 on the General Fund revenue budget 2019/20

Period 3 Monitoring presented to OSC on 19th September 2019.

6. Summary of appendices:

Appendix A – Period 6 (April-September) Budget Monitoring Summary;

Appendix B – Divisional Narrative – Explanation of Variances;

Appendix C – Spending Review Savings

7. Is this a private report?

No

8. Is this a “key decision”?

Yes – as a reduction of revenue expenditure exceeding £0.5m

Revenue Budget at Period 6 (April – September), 2019/20

2019-20	CURRENT BUDGET	Forecast Period 6	Variance
Planning, Development & Transportation	15,292.9	15,292.9	0.0
Tourism Culture & Inward Investment	4,395.3	4,395.3	0.0
Neighbourhood & Environmental Services	31,474.0	31,474.0	0.0
Estates & Building Services	4,425.9	4,545.3	119.4
Departmental Overheads	1,087.5	966.0	(121.5)
Housing Services	2,861.4	2,863.5	2.1
City Development & Neighbourhoods	59,537.0	59,537.0	0.0
Adult Social Care	109,264.2	107,012.8	(2,251.4)
Health Improvement & Wellbeing	18,630.6	18,508.4	(122.2)
Strategic Commissioning & Business Support	1,043.2	1,013.2	(30.0)
Learning Services	10,551.8	10,871.9	320.1
Children, Young People & Families	60,186.9	60,248.0	61.1
Departmental Resources	(2,720.8)	(3,072.0)	(351.2)
Education & Childrens Services	69,061.1	69,061.1	0.0
Financial Services	11,531.4	11,511.1	(20.3)
Information Services	8,609.2	8,609.2	0.0
Human Resources	3,861.7	3,861.7	0.0
Delivery, Communications & Political Governance	5,684.0	5,684.0	0.0
Legal Registration & Coronial Services	2,727.0	2,727.0	0.0
Corporate Resources & Support	32,413.3	32,393.0	(20.3)
Housing Benefits (Client Payments)	500.0	500.0	0.0
Total Operational	289,406.2	287,012.3	(2,393.9)
Corporate Budgets	(89.6)	(2,020.9)	(1,931.3)
Capital Financing	6,005.9	6,005.9	0.0
Total Corporate & Capital Financing	5,916.3	3,985.0	(1,931.3)
Public Health Grant	(26,103.0)	(26,103.0)	0.0
Managed reserves Strategy	(1,851.4)	(1,851.4)	0.0
Demographic pressures reserve	(3,455.0)	(3,455.0)	0.0
TOTAL GENERAL FUND	263,913.1	259,587.9	(4,325.2)

Divisional Narrative – Explanation of Variances

Corporate Resources and Support

Corporate Resources Department is forecasting a balanced outturn on a net budget of £32.4m.

1. Finance

- 1.1. The Financial Services Division expects an underspend of £20k, which will be transferred to the Financial Services reserves to cover costs relating to the development of the corporate financial system.

2. Information Services

- 2.1. Information Services is forecasting a break-even position. The division continues to work on a programme of rationalisation of systems and infrastructure, in order to deliver the spending review savings, which are in process of implementation.

3. Human Resources

- 3.1. Human Resources is forecasting an underspend of £498k due to staff vacancies and an increase in income, similar to the previous monitoring report. This will be used to fund the costs of the Digital Transformation Team within DCPG.

4. Delivery Communications & Political Governance (DCPG)

- 4.1. The Delivery, Communications and Political Governance Division is forecasting to breakeven, after applying the HR underspend to help fund the Digital Transformation Team.

5. Legal, Registration & Coronial Services

- 5.1. The Legal Services Division is forecasting a balanced outturn. Additional capacity is being funded by Corporate and Departmental Reserves.
- 5.2. Coronial Services are forecasting an overspend of some £400k due to high costs in pathology tests and increased workload, continuing the pattern of recent times. The overspend will be funded from corporate budgets in line with normal policy.

City Development and Neighbourhoods

The department is forecasting a balanced outturn on a net budget of £59.5m. Divisionally, the position is as follows:

6. Planning, Transportation and Economic Development

- 6.1. The division is forecasting a balanced outturn. As previously reported the new bus shelter advertising contract will deliver lower income than the previous budget, as expected. This pressure is being managed in the current year within the division by closely controlling expenditure and higher than anticipated income from enforcement of bus lanes.

7. Tourism, Culture & Inward Investment

- 7.1. Pressures have arisen from lower than budgeted income from the summer outdoor performances at DeMontfort Hall and the previously reported operational impact of the redevelopment of Leicester Market. These are being partially offset by efficiencies at DeMontfort Hall, unbudgeted income from the former Granby Halls site pending its sale and close control of other costs / income in the Division, together with planned underwriting from the departmental reserve.

8. Neighbourhood & Environmental Services

- 8.1. The division continues to forecast a balanced outturn, through close management of activity and costs.

9. Estates & Building Services

- 9.1. The Division is now forecasting an overspend of £120k. The implementation of the Technical Services Spending Review continues – this was reported previously, however is taking longer than expected to deliver all the anticipated savings. The work includes implementation of the corporate landlord model and contract consolidation and re-procurement. This pressure is being contained by focussing maintenance spending on only essential repairs and implementing consistent approaches across all properties. Capital fees income is not being generated at the level assumed in the budget. The Division is taking all the actions it can to contain spending, with underwriting being provided by the departmental reserve.

10. Departmental Overheads

- 10.1. This holds the departmental budgets such as added years' pension costs, postage and departmental salaries. Forecast savings of around £120k are now being held to offset pressures in Estates and Building Services.

11. Housing General Fund

- 11.1. The Housing General Fund is forecast to break even. However, pressures on temporary accommodation are continuing as expected, leading to an additional £0.5m being required. This will be funded by reserves held for this purpose and any in year savings that occur as the year progresses.

12. Housing Revenue Account

- 12.1. The Housing Revenue Account (HRA) is a ring-fenced income and expenditure account relating to the management and maintenance of the Council's housing stock. The HRA is forecast to overspend by £0.5m, excluding revenue used for capital spending (which is reported in the capital monitoring report). The additional costs since the previous report are largely due to successful staff regrading appeals.
- 12.2. Rental income continues to be forecast as in line with the budget. An underspend of £0.4m is expected on a budget held for adverse movement in the bad debt provision, which is unlikely to be required.
- 12.3. The Repairs & Maintenance Service is expected to overspend by £0.1m. Underspends on staffing are being used to engage contractors to undertake work on void properties and within gas services. Unplanned costs of £0.5m will be incurred following the re-grading of Multi-Trade Operatives. Staff have undertaken a greater amount of work on the capital programme than planned, resulting in revenue underspend of £0.2m. A further underspend of £0.2m will arise within Housing Fleet, largely due to delays in installing vehicle tracking.
- 12.4. An overspend of £0.8m is forecast within Management & Landlord Services. This is largely due to a one-off cost of £0.6m associated with the relocation of tenants from Goscote House, as previously reported. Staff re-grading and one-off redundancy costs will add a further £0.2m.

Adult Social Care

13. Adult Social Care

- 13.1. The department is forecasting an annual spend of £107m, £2.2m less than the budget of £109.2m.
- 13.2. £1.3m of the underspend relates to preventative services (7% of the total budget) as a result of difficulties in recruiting to posts in Reablement, ICRS (integrated crisis response service) and Enablement. A further £0.5m of staffing underspend is forecast in the social work teams (4% of total team costs), together with £0.4m across the support teams covering admin, commissioning, contracting and performance, which is 7% of the budget for these areas.
- 13.3. Long term service user numbers stood at 5,134 at the end of September, 85 more than at the start of the year, a 1.7% increase. This rate of growth, whilst small in terms of service users, is higher than the 0.4% at the same point last year and the budgeted annual growth of 1.5%. As last year, the growth is predominantly in working age adults (3.35%) with mental health and learning disabilities rather than older people (0.5%)
- 13.4. The rate of increase in need of our existing service users at the end of September was 4.6% (£5.1m) which is in line with the growth at the same point last year. The budget assumes an annual rate of 5.5% (as per last year's out-turn) and the forecast remains the same.
- 13.5. The overall forecast position for net package costs remains as per the budget.

Health Improvement & Wellbeing

14. Public Health & Sports Services

- 14.1. The department is forecasting a small underspend of £0.12m against a budget of £18.63m.
- 14.2. The underspend relates mainly to variable capacity of GPs to provide contraceptive services, which has a budget of £0.3m.
- 14.3. The first phase of the sports services organisational review is still in progress and will be fully implemented by December this year.

Education and Children's Services

15. Education and Children's Services

- 15.1. The department is currently forecasting to spend £69.1m as per the general fund budget. The underlying pressures on the looked after children (LAC) placement cost and SEN home to school transport budgets remain and are being funded using reserves as outlined in the Council budget report. The pressure on the High Needs Block of the Dedicated Schools Grant (DSG) also remains a very significant issue but the DfE have confirmed an increased allocation from 2020/21. The shortfall in the annual allocation in 2019/20 will be funded from remaining DSG reserves.
- 15.2. The total number of LAC has remained relatively stable in the first half of this year, with 678 in total at the end of September compared to 671 at the start of the year. Nevertheless, activity levels are significantly higher than for the same period last year with 37% (28) more new entrants this year to date. This is despite the increased capacity of the MST/CAN and FFT teams who have successfully diverted 95 children away from care this year. Numbers of children leaving care have also risen by 17% compared to last year, with over 30% of these leaving with a special guardianship order.
- 15.3. Whilst the net growth in LAC is only 7 for the period, there has been a shift in the mix of our current cohort as a result of new entrants to care having a significantly higher cost than those that have left care. This trend towards more high cost placements is driven by teenagers who show aggressive, violent behaviour, criminal activity, involvement in county lines, child sexual exploitation or with other severe behavioural

and mental health issues. Consequently, the numbers of external residential placements are increasing and the higher level of support within semi-independent placements results in higher unit costs. Numbers of independent fostering agency placements are also increasing as a result of difficulties in matching children to the internal foster carers available.

- 15.4. Based on a continuation of the volume and mix of LAC entrants seen to date this year and the expected leavers for the remainder of the year, the forecast placement cost will exceed the budget of £29.5m by £1.2m.
- 15.5. The number of social worker agency staff is now only 23 (31 at the end of quarter one), compared to an establishment of 111. ASYEs and level 2 permanent social worker posts represent nearly 50% of the total social workers, higher than will be the case in the future as these staff progress through the career grade. Staffing costs for social workers are currently therefore lower than the core establishment budget and this alongside the use of reserves will offset the additional placement costs.
- 15.6. In SEN, the pressure remains on the general fund in relation to home to school transport costs and on the High Needs Block (HNB) of the DSG for placement costs and other services. Work continues as outlined previously to ensure that we are obtaining value for money across the SEN provision, including in special and mainstream settings together with council provided services. DSG reserves are being used to meet budget pressures in 2019/20 of up to £6m, but these effectively run out in 2020/21.
- 15.7. The DfE have announced additional funding of £6m as part of the HNB formula funding from 2020/21 onwards. This will only deal with the legacy of the shortfall in allocation and not allow either increased expenditure on high needs or put us in a position to deal with growth in demand from 2021 onwards, without finding savings from the areas mentioned above.

Corporate Items & Reserves

16. Corporate Items

- 16.1. The corporate budgets cover the Council's capital financing costs, items such as audit fees, bank charges and levies. At present, an underspend of £0.3m is anticipated.

Spending Review Savings

As members are aware, the Council needs to achieve substantial savings to live within its means in future years. The key means by which we seek to achieve these is the spending review programme. The current round has been termed Spending Review 4 and savings are formally taken from the budget as the associated actions are confirmed.

Further savings within departments are now proposed in the table below:

Description of Saving	Division	2019/20	2020/21	2021/22	2022/23
		£'000	£'000	£'000	£'000
Workspace Income - additional income from review of business unit rents	TCII	0	0	80	160
Markets Review - deletion of posts and efficiencies in running costs.	TCII	0	80	80	80
Reflective bollards and signs - energy savings	PDT	0	50	50	50
Increase enforcement of bus lanes/clearways - introduction of new cameras	PDT	0	150	200	200
HMO licensing saving - additional income from landlord licensing	NES	0	55	55	55
Investment Properties Review - review of leases, service charges and new income streams from capital investment.	EBS	0	150	225	350
Legal Services & Procurement - savings in running costs	Legal	52	52	52	52
IT Services - additional income and cost savings	Finance	36	36	36	36
		88	573	778	983



Capital Budget Monitoring – April-September 2019/20

Decision to be taken by: City Mayor
Overview Select Committee date: 28th November 2019
Lead director: Alison Greenhill

Useful Information

- Report author: Amy Oliver
- Author contact details: amy.oliver@leicester.gov.uk

1. Summary

- 1.1 The purpose of this report is to show the position of the capital programme for 2019/20 as at the end of September 2019 (Period 6).
- 1.2 This is the second capital monitoring report of the financial year. A further quarterly report and an outturn report will be presented as the year progresses.

2. Recommendations

2.1 The Executive is recommended to:

- Note total spend of £50.7m for the year to date.
- Note that the North City Centre Access Improvement Programme, City Centre Street improvements and Connecting Leicester Low Carbon Schemes are now being reported as a single project titled “Connecting Leicester”.
- Approve the addition of £250k to fund additional costs associated with the relocation of the Sexual Health Clinic, funded from Public Health earmarked reserves, as detailed in Appendix D, Para 2.1

The OSC is recommended to:

- Consider the overall position presented within this report and make any observations it sees fit.

3. Supporting Information including options considered

3.1 The 2018/19 to 2019/20 Capital Programme was approved by Council on 30th November 2017 and amended at the 2017/18 and 2018/19 outturn.

3.2 The capital programme is split in the following way:

- (a) Schemes classified as ‘**immediate starts**’, which require no further approval to commence; and
- (b) A number of separate ‘**policy provisions**’ which are not released until specific proposals have been approved by the Executive.

3.3 Immediate Starts are further split into:

- (a) **Projects**, which are discrete, individual schemes such as a road scheme or a new building. Monitoring of projects focusses on delivery of projects on time and the achievement of milestones. Consequently, there is no attention given to in-year financial slippage;

- (b) **Work Programmes**, which consist of minor works or similar on-going schemes where there is an allocation of money to be spent during a particular year. Monitoring of work programmes focusses on whether the money is spent in a timely fashion;
- (c) **Provisions**, which are sums of money set aside in case they are needed, where low spend is a favourable outcome rather than indicative of a problem;
- (d) **Schemes which are substantially complete**. These schemes are the tail end of schemes in previous years' capital programmes, usually consisting of small amounts of money brought forward from earlier years.

3.4 A summary of the total approved 2019/20 capital programme as at Period 6 is shown below:

	£000
Projects	133,629
Work Programmes	121,505
Provisions	462
Schemes nearly complete	4,664
Total Immediate Starts	260,260
Policy Provisions	67,792
Total Capital Programme	328,052

3.5 The following changes have occurred to the capital programme since Period 3:

	£000
Affordable Housing	9,300
Transforming Cities Funding	8,690
ERDF Funded Growth Hub	1,400
Capital Loan to Leicester Cathedral	950
Connecting Leicester addition (Energy Reduction Fund)	574
St Leonard's Tower Block Lift	355
Community Gallery at New Walk Museum	350
Public Realm around the Market	338
Public Realm around the Clock Tower	336
Demolition of The Exchange	250
Additional DFT Breathe Grants	184
Other	(88)
Net Movements	22,639

These movements are included in the table at 3.4 above.

3.6 The following appendices to this report show progress on each type of scheme:

- Appendix A – Projects
- Appendix B – Work Programmes
- Appendix C – Provisions
- Appendix D – Projects Substantially Complete
- Appendix E – Policy Provisions

3.7 This report only monitors policy provisions to the extent that spending approval has been given, at which point they will be classified as projects, work programmes or provisions.

3.8 Capital Receipts

3.8.1 At Period 6, the Council has realised £0.2m of General Fund capital receipts. These receipts are not required to fund the current programme. In line with our policies, with the exception of any earmarked receipts, these are set aside for future capital programmes.

3.8.2 Right to Buy receipts this year have so far amounted to £10.0m.

4. Financial, Legal and other Implications

4.1 Financial Implications

This report is solely concerned with financial issues.

Alison Greenhill, Director of Finance, 37 4001

4.2 Legal Implications

There are no legal implications arising directly from the recommendations of this report.

Emma Horton, Head of Law (Commercial, Property and Planning).

4.3 Climate Change and Carbon Reduction Implications

This report is solely concerned with financial issues.

4.4 Equalities Implications

No Equality Impact Assessment (EIA) has been carried out as this is not applicable to a budget monitoring report.

4.5 Other Implications

Other implications	Yes/No	Paragraph referred
Equal Opportunities	No	-
Policy	No	-
Sustainable & Environmental	No	-
Crime & Disorder	No	-
Human Rights Act	No	-
Elderly/People on low income	No	-
Corporate Parenting	No	-
Health Inequalities Impact	No	-

No other implications are noted as this is a budget monitoring report, and therefore no policy changes are proposed.

5. Background information and other papers

Report to Council on the 30th November 2017 on the Capital Programme 2018/19 to 2019/20.

2018/19 Capital Monitoring Outturn Report presented to OSC on 20th June 2019.

2019/20 Period 3 Capital Monitoring Report presented to OSC on 19th September 2019.

6. Is this a private report

No.

7. Is this a "key decision"?

No.

8. If a key decision please explain reason

PROJECTS

1. Summary

- 1.1 As stated in the cover report, the focus of monitoring projects is physical delivery, i.e. whether they are being delivered on time, on budget and to the original specification. This appendix summarises progress on projects. Project summaries provided by departments/divisions are shown on pages 8-17 within this Appendix.

Department / Division	Budget 2019/20 to 2020/21 £000	2019/20 Spend to Date £000
Corporate Resources	1,562	140
Adult Social Care	2,510	0
Planning, Development & Transportation	71,425	10,789
Tourism, Culture & Inward Investment	5,828	970
Neighbourhood & Environmental Services	743	21
Estates & Building Services	10,091	3,042
Children's Services	26,919	3,606
Public Health	2,330	123
Housing Revenue Account	12,221	230
Total	133,629	18,921

- 1.2 A list of the individual projects is shown in the table on pages 6-7 of this report. This also summarises the progress of each project. Attention is drawn to expected completion dates and any project issues that have arisen.
- 1.3 A colour-coded rating of progress of each project has been determined, based on whether the project is progressing as expected, and whether it is still expected to complete within budget.
- 1.4 The ratings used are:
- (a) **Green** Successful delivery of the project on time, within budget, to specification and in line with original objectives seems very likely. There are no major issues that appear to threaten delivery significantly.
 - (b) **Amber** Successful delivery of the project on time, within budget, to specification and in line with original objectives appears probable. However, some risks exist and close attention will be required to ensure these risks do not materialise into major issues threatening delivery. Alternatively, a project is classed as amber if some insubstantial slippage or minor overspend is probable.
 - (c) **Red** Successful delivery of the project on time, within budget, to specification and in line with original objectives appears to be unachievable. The project is expected to require redefining, significant additional time or additional budget.
 - (d) **Blue** The project is complete.
 - (e) **Purple** The project is on hold, for reasons which have nothing to do with management of the capital programme. Examples include reconsideration of whether the project is still needed as originally proposed, or withdrawal of a funder.

2. Summary of Individual Projects

Dept/ Division	Project	Total Budget (£000)	2019/20 Spend (£000)	Forecast O/(U)spend (£000)	Original Completion Date	Forecast Completion Date	Previous Reported RAG Rating	Project RAG Rating @ P6
CRS	Automatic Call Distribution System Upgrade	70	18	0	Apr-18	Apr-20	Green	Green
CRS	Finance System	926	69	0	Jun-17	Mar-20	Green	Green
CRS	Cash Income Management System	566	53	0	Jan-20	TBC	Green	Purple
ASC	Extra Care Schemes	2,510	0	0	Aug-20	Jul-21	Amber	Amber
CDN (PDT)	Leicester North West Major Transport Scheme	9,345	2,446	0	Mar-20	Mar-21	Amber	Green
CDN (PDT)	Connecting Leicester	26,164	5,231	0	Nov-20	Dec-20	Green	Green
CDN (PDT)	Waterside Strategic Regeneration Area	13,487	2,362	0	Mar-23	Mar-23	Green	Green
CDN (PDT)	St George's Churchyard	844	20	0	Aug-18	TBC	Purple	Purple
CDN (PDT)	Great Central Street / Vaughan Way	2,679	15	0	Jan-19	Aug-19	Green	Blue
CDN (PDT)	Ashton Green	848	41	0	Mar-21	Mar-21	Green	Green
CDN (PDT)	Pioneer Park	3,110	326	0	Jan-21	Jan-21	Green	Green
CDN (PDT)	Newarke Street Car Park Improvements	95	94	0	Sep-18	Aug-19	Green	Blue
CDN (PDT)	Pioneer Park Commercial Workspace (formerly Dock 2)	5,000	5	0	Spring 18	Spring 20	Green	Green
CDN (PDT)	Ashton Green Highways Infrastructure	9,853	249	0	Mar-21	Mar-21	Green	Green
CDN (TCI)	Jewry Wall Museum Improvements	2,952	42	0	Mar-19	Feb-22	Amber	Amber
CDN (TCI)	Leicester Market Redevelopment	2,541	887	0	Dec-18	Mar-20	Amber	Green
CDN (TCI)	Abbey Pumping Station	255	25	0	Mar-19	TBC	Purple	Purple
CDN (TCI)	LCB Courtyard/Garden Development	80	16	0	Apr-19	Mar-20	Green	Green
CDN (NES)	City Centre Playground	100	21	0	Mar-19	Mar-20	Green	Green
CDN (NES)	St Mary's Allotments	547	0	0	Jul-19	Mar-21	Green	Amber
CDN (NES)	Abbey Park Precinct Wall	96	0	0	Aug-19	Mar-20	Amber	Green
CDN (EBS)	Haymarket House, Car Parks & Lifts	9,658	2,913	0	Mid-20	Autumn 20	Red	Amber
CDN (EBS)	11-15 Horsefair Street	433	129	0	Nov-18	Nov-19	Green	Green

Dept/ Division	Project	Total Budget (£000)	2018/19 Spend (£000)	Forecast O/(U)spend (£000)	Original Completion Date	Forecast Completion Date	Previous Reported RAG Rating	Project RAG Rating
ECS	Additional Primary School Places	2,186	1,427	0	May-19	Oct-19	Green	Blue
ECS	Additional Secondary School Places	15,912	1,596	0	Sep-19	Oct-19	Green	Blue
ECS	Additional SEND Places (including Pupil Referral Units)	7,297	560	0	Dec-19	TBC	Amber	Purple
ECS	Children's Residential Homes	1,524	23	0	Aug-20	Aug-20	Green	Green
PH	Leisure Centre Improvement Programme	2,330	123	0	Mar-20	Nov-20	Amber	Amber
Total (excluding HRA)		121,408	18,691	0				
CDN (HRA)	St Leonard's Tower Block - Lift	550	2	0	Mar-18	Apr-21	Amber	Green
CDN (HRA)	Exchange Demolition	350	1	0	Dec-17	Nov-19	Green	Green
CDN (HRA)	Goscote House Demolition	2,981	30	0	Jan-20	Jan-22	Red	Amber
CDN (HRA)	Parking - Spend to Save	250	12	0	Mar-20	Jan-20	Green	Green
CDN (HRA)	New House Build	6,200	141	0	Apr-20	Aug-20	Green	Green
CDN (HRA)	Tower Block Sprinkler Systems	1,390	44	0	Apr-22	Apr-22	Green	Green
CDN (HRA)	Property Conversions (2020/21)	500	0	0	Mar-22	Mar-22	Green	Green
Total HRA		12,221	230	0				
Total (including HRA)		133,629	18,921	0				

3. Commentary on Specific Projects

- 3.1 Explanatory commentary for projects that are not currently progressing as planned, or for which issues have been identified, is provided in the next pages. This has been defined as any scheme that has a RAG Rating other than “green” or “blue”.

Capital Programme Project Monitoring 2019/20 Period 6

Corporate Resources

1. Projects Summary

Project Name	Approval 2019/20 (£000)	Forecast Over / (Under) Spend (£000)	Original Completion Date	Forecast Completion Date	RAG Rating
Automatic Call Distribution System	70	0	April 2018	April 2020	G
Finance System	926	0	June 2017	Mar 2020	G
Cash Income Management System	566	0	Jan 2020	On Hold	P
Total	1,562	0			

2. Projects Commentary (for all projects rated Amber, Red or Purple).

2.1. Cash Income Management System – After an unsuccessful tender process, alternative procurement routes are currently being sought.

Capital Programme Project Monitoring 2019/20 Period 6

Adults

1. Projects Summary

Project Name	Approval 2019/20 (£000)	Forecast Over / (Under) Spend (£000)	Original Completion Date	Forecast Completion Date	RAG Rating
Extra Care – Two Schemes	2,510	0	Aug 2020	Jul 2021	A
Total	2,510	0			

2. Projects Commentary (for all projects rated Amber, Red or Purple).

2.1. Extra Care – Two Schemes Discussions are still in progress with the consortia to agree the contractual arrangements. This is taking longer than anticipated because of the changes that have occurred within the consortia as a result of ‘pausing’ the developments pending the outcome of the Governments consultation on the future of the Local Housing Allowance for supported housing. It is likely these discussions will be concluded at the end of November 2019. If this enables the developments to proceed, then the two schemes will take approximately 18 to 22 months to build.

Capital Programme Project Monitoring 2019/20 Period 6

Planning, Development & Transportation

1. Projects Summary

Project Name	Approval 2019/20 (£000)	Forecast Over / (Under) Spend (£000)	Original Completion Date	Forecast Completion Date	RAG Rating
Leicester North West Transport Scheme	9,345	0	Mar 2020	Mar 2021	G
Connecting Leicester	26,164	0	Nov 2020	Dec 2020	G
Waterside	13,487	0	Mar 2023	Mar 2023	G
St George's Churchyard	844	0	Aug 2018	TBC	P
Vaughan Way / Great Central Street	2,679	0	Jan 2019	Aug 2019	B
Ashton Green	848	0	Mar 2021	Mar 2021	G
Pioneer Park	3,110	0	Jan 2021	Jan 2021	G
Newarke Street Car Park Improvements	95	0	Sept 2018	Aug 2019	B
Pioneer Park Commercial Workspace	5,000	0	Spring 2018	Spring 2020	G
Ashton Green Highways Infrastructure	9,853	0	Mar 2021	Mar 2021	G
Total	71,425	0			

2. Projects Commentary (for **all** projects rated Amber, Red or Purple).

2.1. Connecting Leicester Three projects previously reported separately (North City Centre Access, City Centre Street Improvements and Connecting Leicester – Low Carbon Schemes) have been combined under the “Connecting Leicester” heading. This is because their delivery is carried out through one programme of works and one project board.

2.2. St George's Churchyard Options for the churchyard scheme are currently being reviewed. Monies within the budget have recently been used to deliver highway/public realm improvements on Orton Square/Rutland Street.

Capital Programme Project Monitoring 2019/20 Period 6

Tourism, Culture and Inward Investment

1. Projects Summary

Project Name	Approval 2019/20 (£000)	Forecast Over / (Under) Spend (£000)	Original Completion Date	Forecast Completion Date	RAG Rating
Jewry Wall Museum Improvements	2,952	0	March 2019	Feb 2022	A
Leicester Market Redevelopment	2,541	0	Dec 2018	March 2020	G
Abbey Pumping Station	255	0	March 2019	TBC	P
LCB Courtyard/Garden Development	80	0	April 2019	March 2020	G
Total	5,828	0			

2. Projects Commentary (for all projects rated Amber, Red or Purple).

- 2.1. Jewry Wall Museum** The project has experienced some delays during the initial design stages. However, the project is now progressing, and work has commenced with the investigation of archaeology in the new lift pit. Scheme costs and programme are being reviewed.
- 2.2. Abbey Pumping Station** RIBA phase 3 design work has been put on hold pending a decision on Museum capital investment priorities.

Capital Programme Project Monitoring 2019/20 Period 6

Neighbourhood and Environmental Services

1. Projects Summary

Project Name	Approval 2019/20 (£000)	Forecast Over / (Under) Spend (£000)	Original Completion Date	Forecast Completion Date	RAG Rating
City Centre Play	100	0	March 19	March 20	G
St Mary's Allotments	547	0	July 19	March 21	A
Abbey Park Precinct Wall	96	0	Aug 19	March 20	G
Total	743	0			

2. Projects Commentary (for all projects rated Amber, Red or Purple).

2.1. **St Mary's Allotments** Further consultation on development of the new play area adjacent to the new housing development will commence in November 2019 with installation anticipated in March 2021.

Capital Programme Project Monitoring 2019/20 Period 6

Estates and Building Services

1. Projects Summary

Project Name	Approval 2019/20 (£000)	Forecast Over / (Under) Spend (£000)	Original Completion Date	Forecast Completion Date	RAG Rating
Haymarket House, Car Park and Lifts	9,658	0	Mid 2020	Autumn 2020	A
11-15 Horsefair Street	433	0	Nov 2018	Nov 2019	G
Total	10,091	0			

2. Projects Commentary (for **all** projects rated Amber, Red or Purple).

2.1 Haymarket House, Car Park and Lifts The Haymarket car park improvements are contracted directly by the Council and are in line with the programme. The lifts and Haymarket House (Travelodge) are being delivered via a separate contract with the owner of the Haymarket Shopping Centre. A detailed technical review of the car park improvements has been completed and additional works identified, at a cost of circa £700k. It is advantageous to complete these works now, rather than incur further additional cost and disruption at a later date.

Capital Programme Project Monitoring 2019/20 Period 6

Children's Services

1. Projects Summary

Project Name	Approval 2019/20 (£000)	Forecast Over / (Under) Spend (£000)	Original Completion Date	Forecast Completion Date	RAG Rating
Additional Primary School Places	2,186	0	May 19	Oct 19	B
Additional Secondary School Places	15,912	0	Sept 19	Oct 19	B
Additional SEND Places (including Primary Pupil Referral Unit)	7,297	0	Dec 19	TBC	P
Children's Residential Homes	1,524	0	Aug 20	Aug 20	G
Total	26,919	0			

2. Projects Commentary (for all projects rated Amber, Red or Purple).

2.1 Additional SEND Places (including Primary Pupil Referral Unit) – Following receipt of additional information in relation to the PRU population and some recent changes in Government directive in relation to pupil intervention, the Primary Pupil Referral Places element of this project has been placed on hold. We propose to consider this new information and the final desired outcome in order to ensure the maximum impact across the school pupil population. Work on the remaining SEND places is proceeding.

Capital Programme Project Monitoring 2019/20 Period 6

Public Health

1. Projects Summary

Project Name	Approval 2019/20 (£000)	Forecast Over / (Under) Spend (£000)	Original Completion Date	Forecast Completion Date	RAG Rating
Leisure Centre Improvement Programme	2,330	0	March 2020	Nov 2020	A
Total	2,330	0			

2. Projects Commentary (for all projects rated Amber, Red or Purple).

2.1 Leisure Centre Improvement Programme. Detailed proposals are currently being reviewed. Feasibility work is being undertaken in relation to some planned maintenance works. No further works are expected to start until next financial year.

Capital Programme Project Monitoring 2019/20 Period 6

Housing

1. Projects Summary

Project Name	Approval 2019/20 (£000)	Forecast Over / (Under) Spend (£000)	Original Completion Date	Forecast Completion Date	RAG Rating
St Leonard's Tower Block - Lift	550	0	Mar 18	April 21	G
Exchange Demolition	350	0	Dec 17	Nov 19	G
Goscote House Demolition	2,981	0	Jan 20	Jan 22	A
Parking – Spend to Save	250	0	March 20	Jan 20	G
New Build Council Housing	6,200	0	April 20	Aug 20	G
Tower Block Sprinklers	1,390	0	April 22	April 22	G
Property Conversions (2020/21)	500	0	March 22	March 22	G
Total	12,221	0			

2. Projects Commentary (for all projects rated Amber, Red or Purple).

2.1 Goscote House –The final tenants will move out during Autumn 2019. As reported at Period 3, the site constraints are such that the building will need to be dismantled one floor at a time, taking longer to demolish than originally anticipated and with increased project costs. Full costings will be available once all specialist surveys are complete.

WORK PROGRAMMES**1. Summary**

- 1.1 As stated in the cover report, work programmes are minor works or similar on-going schemes where there is an allocation of money to be spent during a particular year. Monitoring of work programmes focusses on whether the money is spent in a timely fashion.

Department /Division	Approved to spend in 19/20 £000	2019/20 Spend to Date £000	Forecast Slippage £000	Forecast Over/(under) Spend £000
Planning, Development & Transportation	19,429	3,389	10,627	0
Tourism, Culture & Inward Investment	1,485	1,058	252	0
Neighbourhood & Environmental Services	729	29	0	0
Estates & Building Services	2,033	401	0	0
Housing General Fund	5,099	1,181	110	0
LLEP	0	0	0	0
Children's Services	8,123	2,890	1,800	0
Total (excluding HRA)	36,898	8,948	12,789	0
Housing Revenue Account	44,751	20,587	600	(350)
Total (including HRA)	81,649	29,535	13,389	(350)

2. Summary of Individual Work Programmes

Work Programme	Dept/ Division	Approved £000	2019/20 Spend to Date £000	Forecast Slippage £000	Forecast Over/(under) Spend £000
Transport Improvement Works	CDN (PDT)	9,346	833	7,627	0
Bus Engine Retrofitting (DFT funded)	CDN (PDT)	619	677	0	0
Highways Maintenance	CDN (PDT)	2,486	855	0	0
Townscape Heritage Initiative - Business Grants	CDN (PDT)	563	187	0	0
Flood Strategy	CDN (PDT)	355	101	0	0
Festive Decorations	CDN (PDT)	54	5	0	0
Local Environmental Works	CDN (PDT)	425	208	0	0
Legible Leicester	CDN (PDT)	328	47	0	0
Parking Strategy Development	CDN (PDT)	303	128	0	0
Leicester Strategic Flood Risk Management Strategy	CDN (PDT)	3,706	40	3,000	0
Potential Strategic Development Sites Assessment	CDN (PDT)	41	0	0	0
Architectural & Feature Lighting	CDN (PDT)	100	0	0	0
Front Wall Enveloping	CDN (PDT)	153	104	0	0
Replacement Doors & Windows St Saviours Rd	CDN (PDT)	50	0	0	0
Transforming Cities Work Programmes	CDN (PDT)	900	204	0	0
Heritage Interpretation Panels	CDN (TCI)	302	9	252	0
Retail Gateways	CDN (TCI)	85	87	0	0
Arts & Museum Security Improvements	CDN (TCI)	40	0	0	0
Collaborate Business Project - Business Grants	CDN (TCI)	318	282	0	0
Cultural investment programme	CDN (TCI)	680	680	0	0
Growth Hub (funded by ERDF Grant)	CDN (TCI)	30	0	0	0
Community Gallery at New Walk Museum	CDN (TCI)	30	0	0	0
Parks Plant and Equipment	CDN (NES)	152	0	0	0
Replacement Tree Planting	CDN (NES)	86	0	0	0
CCTV Upgrade - Infrastructure Improvements	CDN (NES)	306	0	0	0
CCTV Upgrade - Neighbourhood Facilities	CDN (NES)	90	29	0	0
Street Scene Improvements - Housing Estates	CDN (NES)	45	0	0	0
Beaumont Park Depot Rd & Related works	CDN (NES)	50	0	0	0
Euston Street Store	CDN (EBS)	330	150	0	0
Property Maintenance	CDN (EBS)	1,619	170	0	0
Energy Fund - Pool Covers	CDN (EBS)	84	81	0	0
Private Sector Disabled Facilities Grant	CDN (HGF)	2,364	767	0	0
Repayable Home Repair Loans	CDN (HGF)	300	56	110	0
Vehicle Fleet Replacement Programme	CDN (HGF)	2,435	358	0	0
School Capital Maintenance	ECS	5,982	1,002	1,800	0
BSF Schools' Landlord Lifecycle Fund	ECS	2,141	1,888	0	0
Total (excluding HRA)		36,898	8,948	12,789	0
Council Housing - New Kitchens and Bathrooms	CDN (HRA)	4,000	866	0	(400)
Council Housing - Boiler Replacements	CDN (HRA)	3,425	1,518	0	0
Council Housing - Rewiring	CDN (HRA)	1,760	726	0	0
Council Housing - Disabled Adaptations & Improvements	CDN (HRA)	1,465	343	0	(100)
Council Housing - Insulation Works	CDN (HRA)	100	20	0	0
Council Housing - External Property Works	CDN (HRA)	1,473	182	0	50
Council Housing - Fire and Safety Works	CDN (HRA)	1,492	476	0	0
Community & Environmental Works	CDN (HRA)	2,425	431	0	100
Affordable Housing - Acquisitions	CDN (HRA)	26,330	14,731	600	0
Affordable Housing - RPs & Others	CDN (HRA)	1,488	1,128	0	0
Northgate Business Systems Phase 2	CDN (HRA)	605	159	0	0
E-Communications (Mobile Working)	CDN (HRA)	188	7	0	0
Total HRA		44,751	20,587	600	(350)
Total (including HRA)		81,649	29,535	13,389	(350)

3. **Commentary on Specific Work Programmes**

3.1 Explanatory commentary for work programmes not currently progressing as planned, or for which issues have been identified is provided below. For monitoring purposes this has been defined as any scheme where budgets have significantly changed, where spend is low or where material slippage is forecast.

3.2 **Transport Improvement Works** - The two major schemes within this block are Putney Road and Bus Pinch points.

Putney Road: the scheme is now expected to start in Summer 2020. The scheme has been amended to incorporate additional cycling and walking improvements following a Healthy Streets Assessment. Appointment of a contractor through the new Midlands Highways Alliance Framework and agreeing the associated contractual terms has incurred delay. The contract delay and the requirement to co-ordinate works with utility companies has resulted in a revised completion date.

Bus Pinch Points: camera enforcement is on track at sites including Duns Lane, Lutterworth Road and Humberstone Road, all with cameras operational. Other cameras planned for the current financial year will be at locations including Uppingham Road, Narborough Road and Abbey Street. The detailed design for the St. Margaret's Bus Station exit to Burleys Way is being finalised and construction is now expected to begin in Spring 2020.

3.3 **Leicester Strategic Flood Risk Management Strategy** - This is a project within the Local Growth Fund (LGF) programme which is led and managed by the City Council, with delivery partners the Environment Agency and the Canal & River Trust (CRT). The programme of projects for 2019/20 has been agreed with partners, including the CRT projects slipped from 2018/19. There are currently issues with the EA schemes, which result in slippage. We are working to identify alternative schemes which can be delivered within the LGF timeframe to ensure there is no loss of funding to the project.

3.4 **Repayable Home Repair Loans** - These loans help to support people on low incomes to bring their properties up to a decent standard, enabling them to continue living within their own homes. This is a demand-led service and a drop in the number of applications has led to a forecast underspend of £110k.

3.5 **Schools Capital Maintenance** – On the whole, due to school availability and planning requirements, schemes require completion during the school holidays. There are around 9 projects that will now be carried out in school holidays next year including window replacements, toilet refurbishments, fire risk reduction works and pipework replacement.

PROVISIONS**1. Summary**

- 1.1 As stated in the cover report, provisions are sums of money set aside in case they are needed, where low spend is a favourable outcome rather than indicative of a problem.
- 1.2 As at the end of Period 6, the majority of the following budgets for capital provisions were unspent. The Children's Services Buildings provision has now been fully allocated to Barnes Heath residential home.
- 1.3 Normally provisions are there if needed. The sums below are for the 2019/20 financial year.

Provision	Dept/ Division	Approved £000	2019/20 Spend to Date £000	2019/20 Commit- ments £000	2019/20 Total £000	Remaining Budget £000
Local Investment Fund Support	CDN (TCI)	181	0	0	0	181
Feasibility and Development Studies	CDN (PDT)	75	43	0	43	32
Empty Homes Purchase	CDN (HGF)	50	0	0	0	50
Early Years - Two Year Olds	ECS	156	2	0	2	154
Total		462	45	0	45	417

PROJECTS SUBSTANTIALLY COMPLETE**1. Summary**

- 1.1 As at the end of Period 6, the following schemes were nearing completion. The budgets are the unspent amounts from previous years' capital programmes, mainly as a result of slippage.

Project	Dept/ Division	Approved £000	2019/20 Spend to Date £000	Forecast Slippage £000	Forecast Over/(Under) Spend £000
ICT Investment - Phase 2 - Liquidlogic	ASC	190	8	0	0
Day Care Services at Hastings Road	ASC	19	12	0	0
Friars' Mill Phase 1	CDN (PDT)	26	49	0	0
Townscape Heritage Initiative	CDN (PDT)	169	0	0	0
22 St. Georges Way	CDN (PDT)	541	516	0	0
Braunstone Hall	CDN (EBS)	106	19	0	0
Great Central Railway Museum	CDN (EBS)	139	121	0	0
Tower Block Redevelopment	CDN (HRA)	20	31	0	11
New School Places	ECS	1,369	238	0	0
Secondary School TMBs *	ECS	1,081	1,080	0	0
Children's Homes	ECS	33	0	0	0
Children's Services Contact Centres	ECS	23	0	0	0
Primary School TMBs	ECS	253	0	0	0
Waterside Primary School	ECS	428	0	0	0
Secondary School Places - PFI schools	ECS	4	0	0	0
Secondary School Places - Non-PFI schools	ECS	44	0	0	0
St Paul's Temporary Modular Buildings	ECS	219	45	0	0
Relocation of Sexual Health Clinic	PH	0	97	0	0
Total		4,664	2,216	0	11

*The outstanding budget on new school places projects largely relates to on-going rental costs for the agreed periods.

2. Commentary on Specific Projects Substantially Complete

- 2.1 **Relocation of Sexual Health Clinic** The original capital programme approved a net capital spend of £1.4m for this scheme. Some additional costs have latterly been identified that were not accounted for at the time of completing the project. Therefore, an additional £250k is required to be funded from the public health reserve.

POLICY PROVISIONS**1. Summary**

1.1 As at Period 6, the following policy provisions were still awaiting formal approval for allocation to specific schemes.

Department/ Division	Policy Provision	Amount £000
CDN (EBS)	Property Maintenance	1,124
CDN (PDT)	Economic Action Plan	6,064
CDN (PDT)	Air Quality Action Plan	729
CDN (PDT)	Ashton Green Infrastructure	400
CDN (EBS)	Commercial Property Acquisitions	1,933
CDN (HGF)	Vehicle Replacement Programme	1,415
ECS	New School Places	41,850
ECS	School Maintenance	3,688
ASC	Extra Care Schemes	6,700
Total (excluding HRA)		63,903
CDN (HRA)	New Affordable Housing (18/19 Programme)	1,388
CDN (HRA)	New Affordable Housing (19/20 Programme)	2,201
CDN (HRA)	Other HRA Schemes	300
Total HRA		3,889
Total (including HRA)		67,792

1.2 Releases from policy provisions since Outturn (reflected in the tables above) are listed below:

- £11,450k released for New School Places.
- £250k released from Economic Action Plan provision for 11-15 Horsefair Street.
- £385k released from the Vehicle Replacement Programme provision for the purchase of ultra-low emission vehicles.
- £400k policy provision for Local Environmental Works fully released.

1.3 Releases from policy provisions since Period 6 (not reflected in the tables above) are listed below:

- £729k policy provision for the Air Quality Action Plan fully released 25/10/19.
- £1,124k policy provision for Property Maintenance fully released 12/11/19.
- £3,688k policy provision for Schools Maintenance fully released 12/11/19.

1.4 The Economic Action Plan Policy Provision includes £1,000k that has been committed for the Cultural Investment Programme, as per an executive decision taken on 23rd October 2018. This money will not be formally committed until all of the other funding for the scheme is in place.



Income Collection April 2019 – September 2019

Decision to be taken by: N/A

Overview Select Committee date: 28th November 2019

Lead Director: Alison Greenhill

Useful information

- Ward(s) affected: All
- Report author: Amy Oliver
- Author contact details: Ext 37 5667

1. Summary

This report details progress made in collecting debts raised by the Council during the first six months of 2019-20, together with debts outstanding and brought forward from the previous year. It also sets out details of debts written off under delegated authority that it has not been possible to collect after reasonable effort and expense.

This is a routine report made to members twice each year.

Figures included in this report need to be seen in the context of the total amount of income collected by the Council from the public each year, which amounts to over £400m. Whilst some debt is difficult to collect, and some people find it difficult to pay, ultimately we collect nearly all of the money due to us. An exercise in 2016 suggested that around 1% is eventually written off.

Key issues reported are:-

- a) performance in local tax and rent collection;
- b) continued progress in reducing old debt for other sources of income;
- c) concerns about the impact of Universal Credit affecting the ability to recover debt.

2. Recommendations

2.1 The OSC is recommended to:

- Consider the overall position presented within this report and make any observations it sees fit.

3. Supporting information:

Appendix A is a summary of all debt and a three year moving average of debt.

Appendix B provides more detailed information and narrative for each main category of debt.

4. Financial, legal and other implications

4.1 Financial implications

The report details the current collection and write-off levels of sums payable to the City Council.

Alison Greenhill, Director of Finance, Ext 37 4001

4.2 Legal implications

Where appropriate debts are the subject of legal action through the courts.

Jeremy Rainbow – Principal Lawyer (Litigation) Ext 37 1435

4.3 Climate Change and Carbon Reduction implications

No climate change implications.

4.4 Equality Impact Assessment

The Council has to make every effort to collect its due debts. The Council adopted a new debt policy in June 2016. The new policy aims at ensuring that the Council collects debt in a fair, proportionate and respectful manner.

Copies of the policy are available on the Councils website

<https://www.leicester.gov.uk/your-council/how-we-work/debt-enforcement/if-you-are-struggling-to-pay>

Recovery action needs to strike a fair balance between sensitivity to debtors who are struggling to pay and the interests of the public as a whole. (the income expected is part of our budget)

5. Background information and other papers.

Finance Procedure Rules

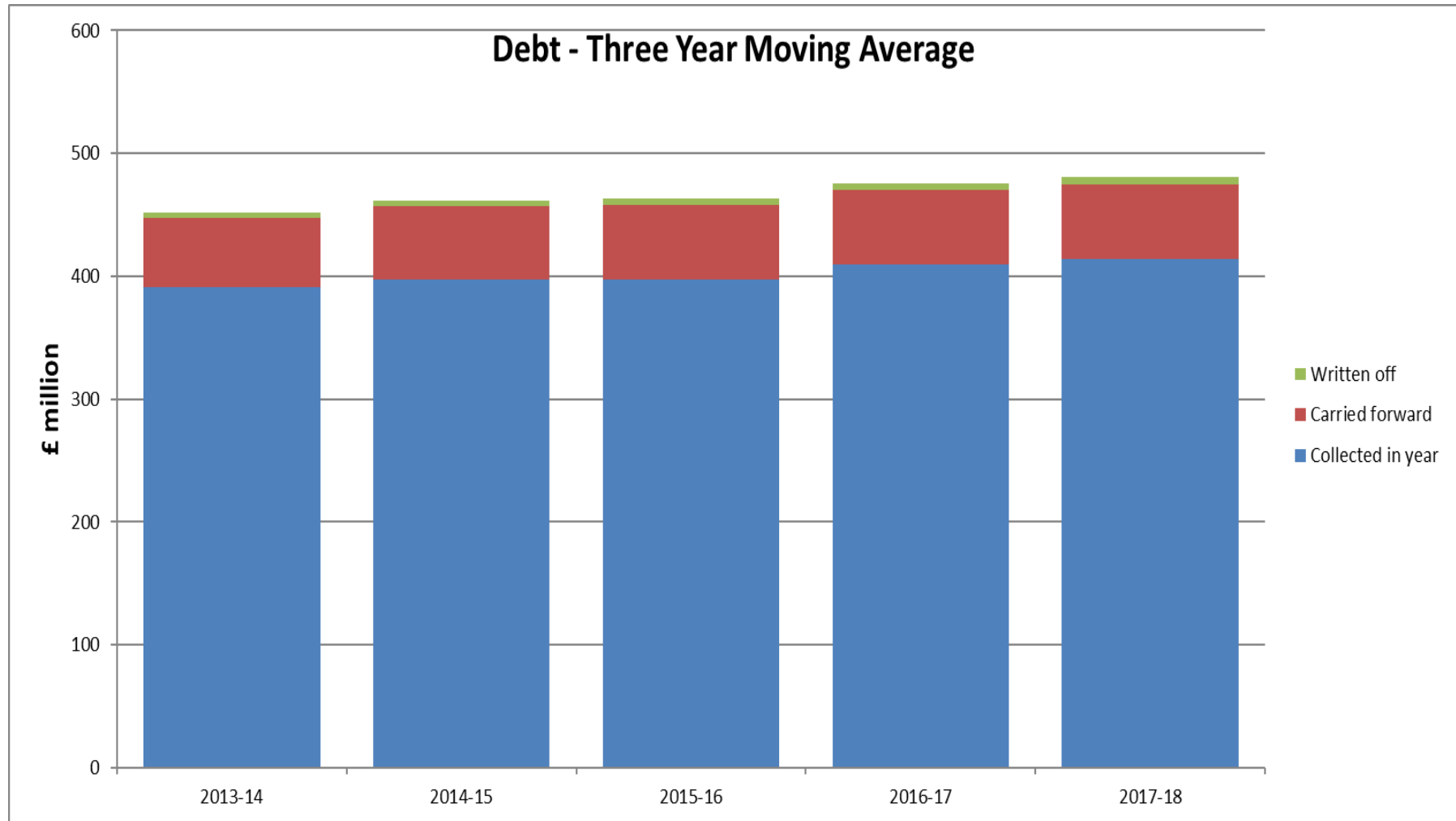
Debt Policy

6. Is this a private report?

No

Summary of all Debt

Income Type	Debts brought forward @ 1/4/2019 £m	Amounts raised 2019-20 £m	Amounts collected 2019-20 £m	Amounts written off/back 2019-20 £m	Debts outstanding @ 30/9/2019 £m
Non Domestic Rates (including Costs)	9.77	113.16	(62.02)	(1.46)	59.45
Council Tax (including Costs)	16.73	137.25	(74.76)	(0.60)	78.62
Housing Benefit Overpayments	15.50	2.47	(2.57)	(0.54)	14.86
Council House Rents	2.29	40.46	(39.57)	(0.13)	3.05
On and Off-Street Car Parking fines	1.95	2.04	(1.23)	(0.72)	2.04
Bus Lane Enforcement	0.83	0.50	(0.35)	(0.41)	0.57
Other Income	15.06	43.50	(44.58)	(0.33)	13.65
Totals	62.13	339.38	(225.08)	(4.19)	172.24



Note: This chart is a moving average (eg 2014/15 is the average of 2013/14, 2014/15 and 2015/16). This treatment smooths anomalies in individual years and highlights trends. Consequently, 2017/18 is the latest year we can report.

1. Business Rates

1.1 Headline Figures for period under review including costs

Uncollected debt b/f £m	Debt raised £m	Debt collected £m	Debt written off £m	Uncollected debt c/f £m
9.77	113.16	(62.02)	(1.46)	59.45

1.2 Background and comparator information

Background Information

Business Rates are a national tax paid by approximately 12,600 businesses in Leicester.

Comparator Information

Percentage Debt collection in the year it is raised: -

- Collection to 30th September 2018 – 56.38%
- Collection to 30th September 2019 – 55.30%

It should be noted that unpaid debt on 31st March continues to be collected in the following year.

As at 30th September 2019, we are 8th out of 14 authorities with comparable populations, but performance tends to bunch (i.e. there is little difference between authorities generally). This is different to Council Tax.

1.3 Debt write-off

Reason for Write Off ↓	No.	Value £000
Unable to Trace	14	47
Deceased – No Assets	0	0
Insolvent / Bankrupt/ Liquidated	95	1,358
All recovery options exhausted / irrecoverable at reasonable expense, including adjustments for costs and write ons	72	56
Totals	181	1,461

1.4 Volume/policy/statutory changes that have occurred during the period and their impact

Changes

The government has introduced a retail discount scheme for all occupied properties with a rateable value of less than £51,000 for 2019-2020 and 2020-2021. The value of the discount will be one-third of the bill after any reduction for other reliefs. So far £2.3m has been awarded to businesses this year. The council is fully compensated through the section 31 grant, for this additional relief.

Write offs have remained high due to the number of insolvent and dissolved companies.

1.5 Summary of measures taken to recover debt

Debt recovery measures

A bill is sent early March detailing instalments that should be made. The ratepayer can either pay by 10 or 12 instalments.

A reminder will be sent if an instalment is missed;

- If the instalment is paid within 7 days of the reminder, the right to pay by instalments is maintained; if a subsequent instalment is missed a final notice will be issued stating that the right to pay by instalments has been lost and the full charge has become payable;
- If the instalment is not paid within 7 days of the reminder, the full charge becomes payable.
- If the full charge becomes payable and is not paid within 7 days, a summons will be issued and a liability order sought at the Magistrates' Court. Costs become payable at this stage.

At every stage of the recovery process the ratepayer payer is offered a formal payment arrangement

An external supplier has been appointed who assists with recovery on difficult targeted cases.

Recovery options after a liability order obtained

Referral to Enforcement Agent;
 Bankruptcy / liquidation;
 Charging Order (only with ratepayer's consent);
 Committal to Prison.

2. Council Tax

2.1 Headline Figures for period under review including costs

Uncollected debt b/f £m	Debt raised £m	Debt collected £m	Debt written off £m	Uncollected debt c/f £m
16.73	137.25	(74.76)	(0.60)	78.62

2.2 Background and comparator information

Background information

Council tax is a national tax, charged to 139,800 properties in Leicester. The amount we collect includes sums charged by the fire authority and police commissioner.

Comparator information

Percentage of debt collected in the year it is raised: -

- Collection to 30th September 2018 – 53.70%
- Collection to 30th September 2019 – 53.28%

It should be noted that unpaid debt on 31st March continues to be collected in the following year.

As at 30th September 2019, we are 6th out of 14 authorities with comparable populations.

2.3 Debt write-off

Reason for Write Off ↓	No.	Value £000
Unable to Trace	636	446
Deceased – No Assets	23	14
Insolvent / Bankrupt/ Liquidated	134	102
All recovery options exhausted / irrecoverable at reasonable expense, including adjustments for costs and write ons	195	38
Totals	988	600

2.4 Volume/policy/statutory changes that have occurred during the period and their impact

Changes

From 1st April 2019, councils have new powers to increase council tax premiums on homes left empty for over two years. Last year a consultation was held about this and in November 2018 the council approved the following increases:

- From April 2019, homes **empty for more than two years** will be charged **double** the council tax of occupied homes.
- From April 2020, homes **empty for more than five years** will be charged **three times** the council tax of occupied homes.
- From April 2021, homes **empty for more than 10 years** will be charged **four times** the council tax of occupied homes.

The first of these changes came into effect from 1st April 2019.

The collectable debt as at 1st April 2019 after awards of council tax support was £138.9m compared to £130.5m as at 1st April 2018, an increase of £8.4m.

2.5 Summary of measures taken to recover debt

Debt recovery measures

A bill is sent in early March, detailing instalments that should be paid. The council tax payer can either pay by 10 or 12 instalments.

A reminder will be sent if an instalment is missed:

- if the instalment is paid within 7 days of the reminder, the right to pay by instalments is maintained; if a further instalment is missed, another reminder can be issued; if a third instalment is missed, a final notice will be issued stating that the right to pay by instalments is lost and the full balance becomes payable;
- If the instalment is not paid within 7 days of the first /second reminder, the right to pay by instalments is lost and the full balance becomes payable;
- if the full balance becomes payable and is not paid within 7 days, a summons will be issued and a liability order sought at the Magistrates Court.

At every stage of the recovery process, the council tax payer is offered a formal payment arrangement. Within the recovery process, safeguards have been put in to protect the most vulnerable.

Recovery options after a liability order obtained

Attachment to Earnings;

Attachment to Income Support / Job Seekers Allowance / Employment Support Allowance / Pension Guarantee Credit / Universal Credit;

Referral to Enforcement Agent (if an attachment is not possible).

If the options above are not successful, then the following recovery actions are considered. An external supplier has been appointed who assists with recovery on difficult targeted cases.

Bankruptcy, where there are assets;

Charging Order application (not made until after attempted enforcement agent action); or

Committal to prison.

3. Overpaid Housing Benefit

3.1 Headline Figures for period under review including costs

Uncollected debt b/f £m	Debt raised £m	Debt collected £m	Debt written off £m	Uncollected debt c/f £m
15.50	2.47	(2.57)	(0.54)	14.86

3.2 Background and comparator information

Background information

The main cause of housing benefit overpayments is delays in recipients telling the Council of changes in their circumstances, resulting in too much benefit being paid. By its nature overpaid housing benefit is difficult to collect. Of the £14.86m, we have outstanding, there are robust recovery processes in place to recover debt wherever possible. Overall, housing benefit debt continues to reduce, from £16.79m at 30/09/2018 to £14.86m as at 30/09/2019.

- 30/09/2019 £14.86m
- 30/09/2018 £16.79m
- 30/09/2017 £17.63m

The changes to the benefits system, with the introduction of Universal Credit Full Service (UCFS), means it is more important than ever to ensure that where possible the creation of Housing benefit overpayments are kept to a minimum and, where created, they are quickly identified, and all recovery options pursued.

Comparator information

There is no like for like comparator information available

3.3 Debt write-off

Reason for Write Off ↓	No.	Value £000
Unable to Trace	304	117
Deceased – No Assets	6	4
Insolvent / Bankrupt/ Liquidated	69	26
All recovery options exhausted / irrecoverable at reasonable expense, including adjustments for costs and write ons	1,452	392
Totals	1,831	539

3.4 Volume/policy/statutory changes that have occurred during the period and their impact

Changes

The migration to Universal Credit continues to impact on our ability to collect debt from ongoing benefit. Any claimant moving onto UC is notified of any outstanding balance immediately and given a range of options to make repayment. Further to this regular changes to the rules surrounding who should claim Universal Credit impact on our ability to recover and forecast effects.

3.5 Summary of measures taken to recover debt

Debt recovery measures

Debt is collected by means of deduction from ongoing benefit payments, if there is current entitlement;

- If there is no current entitlement, payment is requested from customer in the first instance before it is referred to the Business Services Centre.
- Legislation permits us to deduct overpayments from other state benefits. Requests have been made to the DWP, but response times are poor as to whether deductions can or cannot be made. These cases are monitored closely: no other action can be taken until a response has been received.

3.6. Processing backlogs

Backlogs

There remains a backlog of debt awaiting recovery; however it has significantly reduced from £1.4m in September 2018 to £0.3m in September 2019.

4. Housing Rent

4.1. Headline Figures for period under review

Uncollected debt b/f £m	Debt raised £m	Debt collected £m	Debt written off £m	Uncollected debt c/f £m
2.29	40.46	(39.57)	(0.13)	3.05

4.2 Background and comparator information

Background information

The authority currently collects rent from approximately 20,100 tenancies across the City. 9,800 of our tenants (49%) are on full or partial Housing Benefit and 2,800 (14%) on Universal Credit. The debt raised & collected includes the element paid by Housing Benefit.

4.3. Debt write-off

Reason for Write Off ↓	No.	Value £000
Unable to Trace	-	-
Deceased – No Assets	-	-
Insolvent / Bankrupt/ Liquidated	-	-
All recovery options exhausted / irrecoverable at reasonable expense, including adjustments for costs and write ons	535	130
Totals	535	130

4.4. Volume/policy/statutory changes that have occurred during the period and their impact

Changes

Universal Credit Full Service (UCFS) commenced in June 2018. The categories of people that can claim Universal Credit is broad and it is anticipated that UC migration will be completed by 2023.

Tenants receiving Housing Benefit from the Local authority can have it directly paid into their rent account. However, UCFS means tenants apply for support with housing related costs from the DWP. This means that money is paid directly to the claimant rather than us as the landlord. Vulnerable tenants and those with a history of rent arrears or homelessness may be able to have their rent paid directly to the landlord by applying for an Alternative Payment Arrangement (APA).

By the end of Quarter 2 a total of 2,800 tenants had made a new claim for UC and the total value of arrears relating to UC claimants stood at £916k. There is an average increase of 50 UC cases per week. The emerging trend is that tenants are already in arrears when moving on to UC and as the claim takes up to 5 weeks to process this puts the tenant further behind. This increases to 8-9 weeks if we apply for an APA. However, we are finding that once tenants receive their Universal Credits they pay outstanding arrears.

4.5 Summary of measures taken to recover debt

Debt recovery measures

Rent Arrears for current tenants are managed by the Housing Income Management Team. The team closely monitors and maintains regular contact with those tenants having the highest level of arrears. The ultimate sanction for non-payment is eviction, but this is only pursued as a last resort. Arrears of rent are not written-off for live tenancies; this is considered for former tenants where the debt is uneconomical to pursue or where tenants cannot be traced.

The Income Management Team are working collaboratively with the Department of Works and Pensions and work coaches from the local Job Centre Plus to minimise any impact of Universal Credit.

The council have also put advisors in job and advice centres to work with tenants, to help reduce potential future debts arising from the Universal Credit payments process.

5. Parking Fines (Penalty Charge Notice)

5.1 Headline Figures for period under review

Uncollected debt b/f £m	Debt raised £m	Debt collected £m	Debt written off £m	Uncollected debt c/f £m
1.95	2.04	(1.23)	(0.72)	2.04

5.2 Background and comparator information

Background information

The Council issues penalty notices for both on-street and off-street parking charge evasion, as well as illegal parking. There are two nationally set rates based on the seriousness of the offence, details below;

- (a) £25 or £35 if paid with 14 days;
£50 or £70 if paid after 14 days.

Comparator information

The percentage of tickets issued during the year, paid at 30th September

- 2018/19 – 67%
- 2019/20 – 69%

5.3. Debt write-off

Reason for Write Off ↓	No.	Value £000
Unable to Trace	4,996	451
Deceased – No Assets	6	1
Insolvent / Bankrupt/ Liquidated	154	16
All recovery options exhausted / irrecoverable at reasonable expense, including adjustments for costs and write ons	2,411	256
Totals	7,567	724

5.4 Volume/policy/statutory changes that have occurred during the period and their impact

Changes

None

5.5. Summary of measures taken to recover debt

Debt recovery measures

- Reminder letters
- Legal action

6. Bus Lane Enforcement Fines

6.1 Headline Figures for period under review

Uncollected debt b/f £m	Debt raised £m	Debt collected £m	Debt written off £m	Uncollected debt c/f £m
0.83	0.50	(0.35)	(0.41)	0.57

6.2 Background and comparator information

Background information

The Council issues fines for driving in bus lanes with enforcement schemes. Fines are levied at the rate of £60, which is discounted to £30 if paid within 14 days.

The debt collection for bus lane enforcement debt is collected on our behalf by Nottingham City Council.

Comparator information

The percentage of tickets issued during the year, paid at September 30th.

- 2018/19 – 56%
- 2019/20 – 55%

6.3 Debt write-off

Reason for Write Off ↓	No.	Value £000
Unable to Trace	943	32
Deceased – No Assets	3	0
Insolvent / Bankrupt/ Liquidated	17	2
All recovery options exhausted / irrecoverable at reasonable expense, including adjustments for costs and write ons	4,253	374
Totals	5,216	408

6.4 Volume/policy/statutory changes that have occurred during the period and their impact

Changes

None

6.5 Summary of measures taken to recover debt

Debt recovery measures

- Reminder letters
- Legal action

7. Other Income

7.1 Headline Figures for period under review including costs*

Uncollected debt b/f £m	Debt raised £m	Debt collected £m	Debt written off/back £m	Uncollected debt c/f £m
15.06	43.50	(44.58)	(0.33)	13.65

7.2 Background and comparator information

Background information

“Other Income” includes all income other than the sources described above, and is collected by the Business Service Centre. It covers a wide variety of income from various individuals and organisations. Examples include: commercial rents, adult care costs for service users, and repairs & maintenance charges relating to Council property.

The council continues to be successful in reducing debt over 12 months old. However, we are now seeing the debt over 12 months beginning to plateau, as the debt that remains is difficult to collect.

Comparator information

Debt over 12 months old (aged debt) continues to reduce from £3.68m in September 2018 to £3.28m in September 2019.

- 30/09/2016 £6.65m
- 30/09/2017 £4.42m
- 30/09/2018 £3.68m
- 30/09/2019 £3.28m

7.3 Debt write-off

Reason for Write Off ↓	No.	Value £000
Unable to Trace	28	11
Deceased – No Assets	202	115
Insolvent / Bankrupt/ Liquidated	21	12
All recovery options exhausted / irrecoverable at reasonable expense, including adjustments for costs and write ons	3,195	194
Totals	3,446	332

7.4 Volume/policy/statutory changes that have occurred during the period and their impact

Changes

Policy changes in non-residential care resulted in a review of all service users' contributions, and an increase in the level of invoiced charges.

7.5 Summary of measures taken to recover debt

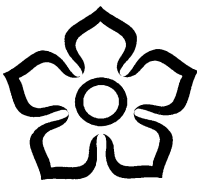
Debt recovery measures

A first reminder is issued at 14 days; when an invoice remains unpaid. Seven days later a second reminder is issued.

A letter before action known as a letter of claim follows if the case is suitable for enforcement in the county court. If the Council obtains a judgment or an order for recovery of award and if payment is still not forthcoming the next actions, we can take include;

- Referral to an enforcement agent
- Third party debt order
- Attachment to earnings
- Charging Order

Cases not suitable for enforcement through county court procedures are referred to enforcement agents for collection.



Leicester
City Council

**WARDS AFFECTED:
ALL WARDS (CORPORATE ISSUE)**

OVERVIEW SELECT COMMITTEE

28th November 2019

MID-YEAR REVIEW OF TREASURY MANAGEMENT ACTIVITIES 2019/20

Report of the Director of Finance

1. Purpose of Report

- 1.1 This report reviews how the Council conducted its borrowing and investments during the first six months of 2019/20.

2. Summary

- 2.1 Treasury management is the process by which our borrowing is managed, and our cash balances are invested. Whilst there are links to the budget, the sums in this report do not form part of the budget. To the extent that the Council has money it can spend, this is reflected in the annual budget report. Cash balances reported here cannot be spent, except to the extent already shown in the budget report and accounts.
- 2.2 The Council has incurred debt to pay for past capital expenditure
- 2.3 The Council also has cash balances. These are needed for day to day expenditure (e.g. to pay wages when they are due). A substantial proportion can only be used to repay debt but (because of Government rules) we have been unable to use them to repay debt. Thus, they are held in investments.
- 2.4 The report commences with an overview of treasury management, including loans and investments at key dates. It then reviews the credit worthiness of investments and implementation of our strategy, provides outcomes on key performance measures and concludes by reviewing compliance against limits set by the Council.
- 2.4 2019/20 has seen only modest economic growth in the UK and elsewhere. However, there are risks and these are discussed further in section 5.
- 2.5 We continue to monitor the impact of the “bail in” requirements whereby major depositors could be forced to inject funds into banks which are running into trouble, introduced earlier in the year. This is further discussed below.

2.6 To protect against possible problems arising from a “no deal” Brexit, we are increasing the level of investments with money market funds domiciled in the UK. This is not because we are concerned about credit worthiness but ensures we can access funds if there are problems with settlement systems immediately after Brexit.

3. Recommendations

3.1 Members of the Overview Select Committee are recommended to note the report and make comments to the Director of Finance and the Executive as they wish.

4. Overview of Treasury Management

Main elements of Treasury Management

4.1 There are two main elements to treasury management. The first is managing our borrowings which have been taken out to finance capital expenditure. Most capital schemes are now financed by grant, and only a limited number of schemes are financed by borrowing (generally those which pay for themselves). In the past the Government expected us to borrow but allowed for the cost of borrowing in our grant settlement, and we still have a lot of debt which was taken to meet this capital expenditure.

4.2 Historic debt can sometimes be restructured to save money, i.e. repaying one loan and replacing it with another, and this is always given active consideration. In recent years, Government rule changes have normally made it prohibitively expensive to repay loans borrowed from the Public Works Loans Board.

4.3 Changes were recently announced increasing the interest rates charged on PWLB loans by 1%, partly as a response to high levels of borrowing by authorities funding commercial acquisitions. Nationally, this is having a significant impact on the investment plans of many local authorities. However, the Council has no plans to borrow in 2019/20 and it is unlikely that the Council will need to borrow over the medium term.

4.4 The revenue budget approved by the Council for each financial year includes provision for the interest payable on this borrowing. It also includes a provision for repaying the borrowing over a number of years (broadly speaking over the economic life of the assets acquired).

4.5 The second element is cash management which involves managing the Council’s investments to ensure the optimum amount of money is in the bank account on a day-to-day basis – so that there is enough money in the account to cover the payments made on the day, but no more (cash held in the bank account earns negligible interest).

4.6 The Council has substantial investments, but this is not “spare cash”. There are three reasons for the level of investments: -

(a) Whilst the Government no longer supports capital spending with borrowing allocations, we are still required to raise money in the budget each year to repay debt. Because of the punitive rules described above, we are not usually able to repay any debt, and therefore have to invest the cash;

(b) We have working balances arising from our day to day business (e.g. council tax received before we have to pay wages, and capital grants received in advance of capital spending);

- (c) We have reserves, which are held in cash until we need to spend them. We expect reserves to fall over the next few years. The reserves position was described in the budget report.

Treasury Management Policy and Monitoring

- 4.7 The activities to which this report relates are governed by the Treasury Strategy for 2019/20 which was approved by the Council on 20th February 2019. This establishes an outline plan for borrowing and investment. The strategy is drawn up in the light of the Council's expected borrowing requirements, its expected cash balances, the outlook for interest rates and the credit worthiness of the banks with whom the Council might invest its cash balances.
- 4.8 A twice-yearly report is submitted to your Committee reviewing the treasury activity undertaken in the year. This report is the mid-year report for 2019/20

Loans and Investments at Key Dates

- 4.9 Table 1 below shows the loans (money borrowed by the Council) and investments (money invested by the Council) as at 31/03/2019 and 07/10/2019. The rates shown are the averages paid and received during 2019/20.
- 4.10 No new loans have been borrowed and no debt restructuring has taken place.
- 4.11 Investments have increased by £20m from £273m to £293m. This is normal at the mid-year point: cash flow out of the authority tends to be weighted to the second half of the year.

Table 1- Loans & Investments

	Position at 31/03/2019 Principal £M	Position at 07/10/2019 Principal £M	Average Rate
Long Term Fixed Rate Loans			
Public Works Loan Board (PWLB)	134	134	4.2%
Market	25	25	4.4%
Variable Rate Loans			
Bank Loans	20	20	4.1%
Gross Debt	179	179	4.2%
Treasury Investments			
Banks and Build Soc	33	58	
Other Local Authorities	172	158	
Government Debt			
Management Office	4	0	
Money Market Funds	55	67	
Property Funds	8	8	
Total Treasury Investments	272	291	1.0%
Investment Strategy Loans	1	2	
Total Investments	273	293	1.0%
NET INVESTMENTS	85	114	

4.12 The investments include £8m in property unit trusts. These are unit trusts which invest in property (as opposed to more traditional unit trusts that invest in shares). The returns included in the table above do not include any movements in the value of these investments. This is because these investments are bought and sold in secondary markets, but transactions are infrequent and so there is no firm quoted price for these investments. Value changes will be reflected in our accounts.

5. Credit Worthiness of Investments & Interest Rate Outlook

5.1 2019/20 showed a weaker economic environment within the world economy due, in part, to tensions between the USA and its trading partners. Within the Eurozone many of the economic and financial tensions that followed the crisis of 2008 have eased but significant underlying issues remain. Tensions between the USA and trading partners remain a source of uncertainty. The full impact of the UK's exit from the EU on the economy remains to be seen.

5.2 The core expectation of the Council's treasury advisors, Arlingclose, is for the Bank Rate to remain at its current level of 0.75% until at least 2023. Inflationary pressures, possibly following future devaluations in the value of the pound, could carry the risk of higher interest rates. On the other hand, risks around Brexit could argue for bank rate increases to be moderated in order to support the UK economy.

- 5.3 The governments of the largest world economies, including the UK, have implemented measures to make banks less likely to fail but also to reduce the impact on the financial system and on tax payers if they do fail. The measures for dealing with a failing bank see investors who have lent or deposited money (which includes us) taking significant losses before there is any tax payer support (“bail in”). Our assessment of risk is based both on the risk that banks fail (as measured by credit ratings) and also on the level of losses that we might face should the banks require capital support to prevent failure. The view of Fitch, the credit rating agency, is that major UK banks are well positioned to deal with any pressures that might emerge from Brexit.
- 5.4 These developments were reflected in the Council’s approach to managing credit risk in its Treasury Strategy for 2019/20. It has adopted a cautious stance over the whole period covered by this report and has only directly lent to strong UK banks, other local authorities and the UK Government. Other lending has been part of pooled funds (see 5.5 below).
- 5.5 The Council has an indirect exposure to non-UK banks through its investment in money market funds. Money market funds are like “unit trusts” but rather than investing in company shares these funds invest in interest bearing investments such as bank deposits. When we open such funds, they are vetted to ensure that they have strong investment and risk management processes to ensure a high level of credit worthiness in the underlying investments, and we receive advice from our treasury advisor, Arlingclose. Investing in this way helps manage credit risk by having a high level of diversification amongst the underlying banks and institutions to whom money is lent. Interest rates on these funds are low, because we have immediate access to the funds. Some of our money needs to be immediate access (like individuals will usually keep some money in a current account). Rates are, however, better than alternatives such as the Government’s Debt Management Office. In the short term, we are increasing the proportion held in UK based funds to ensure we can access funds if there are technical problems immediately after Brexit.
- 5.6 The Council has an investment strategy which permits investment in local commercial opportunities. These investments are managed within the Council’s framework for managing capital expenditure and are not considered in detail within this report. However, these investments are included at table 2 below, because the strategy puts to work cash balances which would otherwise be invested in low interest paying deposits.
- 5.7 The Treasury Strategy 2019/20 permits investment in property funds. Investments of £8m have been made in two funds, the Lothbury Property Trust and the Threadneedle Property Unit Trust. No further investments are likely to be made during in 2019/20 owing to uncertainties around Brexit.

6. Implementation of Borrowing & Investment Strategy

- 6.1 The strategy approved by Council for 2019/20 envisaged using cash balances instead of borrowing, and this strategy has been adhered to.
- 6.2 Given that the Council continues to have a high level of investments, active consideration is given to the possible early redemption of a limited amount of debt. This, however, is not straightforward as debt repayment usually involves the payment of a premium. The level of such premia payable is generally high and premature debt redemption is usually not financially viable.

6.3 We hold £20m of debt which is described as variable rate loans in table 1. These are technically “LOBOs” which are fixed rate but on which the lender may ask for a rate rise. We have the option to repay if they do. Members may be aware of some criticism of LOBOs nationally, principally in respect of authorities which have complex mechanisms for calculating interest rates. We do not: we would be pleased to receive a request for a rate rise as we would then take the opportunity to repay. To all intents and purposes, they are simply fixed rate loans. We will explore any viable options to repay these which present themselves

7. **Key Performance Measures**

7.1 The most important performance measures are the rate of interest on the Council’s borrowings, the timing of borrowing decisions, the timing of decisions to prematurely repay debt and the return on investments. No new loans have been borrowed and no loans have been repaid.

7.2 The Council benchmarks its investments and the latest data for the investment portfolio is as at 30th September 2019.

7.3 Treasury investments comprise internally managed investments, and longer maturity externally managed funds.

7.4 The following table compares our performance against that of participating authorities. This information is available for internally managed investments (including money market funds) and externally managed funds. It is a “snapshot” of investments held at 30th September 2019. No comparative data is held for the local investment fund.

Table 2 – Key Performance Data

Investment	Leicester City Council Revenue return	All Authorities’ Revenue return
Internally managed	0.91%	0.80%
Longer term investments	3.90%	3.7%
Investment Strategy	4.30%	n/a
Total	1.02%	1.34%

7.5 The average rate of interest on internally managed investments for participating authorities at 30th September is 0.8% whilst the Council’s own rate is higher: 0.91%.

7.6 The average rate of interest on all investments for participating authorities at 30th September is 1.34% whilst the Council’s own rate is 1.02%. This is mainly explained by other authorities having a higher proportion of investments in longer term investments and this is discussed further below.

7.7 The average rate of return on longer term investments (excluding capital gains and losses) is 3.7% for participating authorities at 30th September whilst the Council’s own rate is 3.9%. This category will cover a wide range of investments and there an unavoidable element of “comparing apples with pears”. As at 30th September the Council’s own investments comprised units in property unit trusts. These carry less risk than some other investment types and the lower risk sometimes equates to a lower investment return compared to more adventurous funds.

7.8 Higher investment returns are always available if higher credit risk is accepted. However, the trade-off between risk and reward was considered when investment strategies were set for 2019/20 and in the current economic climate continues to be a most important consideration. The “return of the principal” is more important than the “return on the principal”: our primary concern is to ensure that the funds invested will be repaid on time and in full. This remains our approach during the current financial year.

7.9 The benchmarking data also indicated that other authorities, on average, held longer term investments and that this contributed to the higher return achieved by the average authority. Given the uncertainties created by Brexit we are unlikely to make significant longer term investments over the remainder of 2019/20.

8. Use of Treasury Advisors

8.1 The Council are advised by Arlingclose Ltd. They advise on all aspects of treasury management, but their main focus is on providing advice on the following matters:

- the creditworthiness of banks
- the most cost effective ways of borrowing
- appropriate responses to Government initiatives
- technical and accounting matters.

9. Compliance with the Council’s Treasury Strategy

9.1 As required by the statutory borrowing framework, the Council is required to set a number of prudential limits and indicators. These limits are set annually and can be found within the budget and Treasury Strategy.

9.2 For the operational implementation of the Council’s Treasury Management Strategy the most important limits and indicators that need to be monitored throughout the year are:

- The authorised limit – the maximum amount of borrowing that the Council permits itself to have outstanding at any one time
- The operational limit – a lower limit to trigger management action if borrowing is higher than expected.
- The maximum proportion of debt that is fixed rate.
- The maximum proportion of debt that is variable rate.
- Limits on the proportion of debt maturing in a number of specified time bands
- Limits on sums to be invested for more than 364 days

9.3 These limits are monitored and have been complied with.

10. Financial and Legal Implications

10.1 This report is solely concerned with financial issues. Kamal Adatia, Legal Services, has been consulted as Legal Advisor and there are no legal issues.

11. Other Issues

OTHER IMPLICATIONS	YES/NO	Paragraph Within Supporting information	References
Equal Opportunities	No		
Policy	No		

Sustainable and Environmental	No	
Crime and Disorder	No	
Human Rights Act	No	
Elderly/People on Low Income	No	
Corporate Parenting	No	
Health Inequalities Impact	No	

12. Background Papers

12.1 The Council's Treasury Management Strategy - "Treasury Strategy 2019/20" (Council 20th February 2019). The Council's Treasury Policy Document – "Framework for Treasury Decisions" – Council 20th February 2019.

13. Consultation

13.1 Arlingclose Ltd (the Council's Treasury Management advisers).

14. Author

14.1 The author of this report is David Janes, Treasury Manager, on extension 37 4058.

Alison Greenhill
Director of Finance.

Leicester City Council Scrutiny Review

Economic Development at Local Level.

October 2019

To be completed by the Member proposing the review

1.	Title of the proposed scrutiny review	Economic Development at Local Level.
2.	Proposed by	Cllr Sue Waddington
3.	Rationale	The Labour Party manifesto for the 2019 City Council elections said that “Labour would develop job creation, skills and investment plans for parts of Leicester which are economically excluded, including opportunities for local businesses and for young people to engage in positive activities.” This review will explore how these aims can be achieved at local levels..
4.	Purpose and aims of the review What question(s) do you want to answer and what do you want to achieve? (Outcomes?)	This review will seek to evaluate how these commitments are being met and the measures that could be taken to increase economic participation at local levels, through overarching strategies and individual projects. It will identify and characterise what is meant by economic exclusion at a local level and make recommendations to address the key problems and build upon opportunities. Following the statistical exercise referred to in 7 below, two areas will be selected for in depth consideration.
5.	Links with corporate aims / priorities How does the review link to corporate aims and priorities?	<p>The Leicester to Work Economic Action Plan is underpinned by the objective of getting those most in need into training and into work. This review will provide an opportunity to support an updated plan based on the objectives of this review to explore the means of encouraging local economic development</p> <p>This review will seek to evaluate the success of existing strategies and investigate measures which might improve developing strategies and consider recommending individual projects.</p> <p>Other key strategies will include the LLEP Area Review (2017) and the review will seek to examine how well it meets the objectives outlined in this review.</p> <p>Other corporate aims which are relevant include:- Anti Poverty policies Living wages policies Procurement policies</p>

6.	<p>Scope Set out what is included in the scope of the review and what is not. For example which services it does and does not cover.</p>	<p>Within the council the review would seek advice and information from within the Economic Regeneration and Adult Skills and Learning teams. The procurement department will also be asked to provide information and advice about how procurement strategies support the economic and social objectives of work creation. Neighbourhood and Youth services and Local schools, colleges and Universities would also be asked to give evidence</p>
<p>Develop a draft Project Plan to incorporate sections seven to twelve of this form</p>		
7.	<p>Methodology Describe the methods you will use to undertake the review.</p> <p>How will you undertake the review, what evidence will need to be gathered from members, officers and key stakeholders, including partners and external organisations and experts?</p>	<p>Information will be gathered by a task group drawn from members of the Economic Development, Transport and Tourism Scrutiny Commission. Task group meetings will be confidential but normally the notes from the meeting will be published as part of the final report to the Commission.</p> <p>Council officers will be invited to provide written and/or oral evidence to this task group. Statistical evidence will be sought to provide information about levels of employment and economic activity, skills and qualification levels and crime rates in different neighbourhoods in the City. Information about existing opportunities in those areas will also be analysed, such as employment, training and apprenticeships; community facilities; public transport; youth and community provision etc. Following the collection of this evidence, two areas of the City will be selected for consideration.</p> <p>Outside bodies will be invited to provide written/oral evidence to the task group.</p> <p>Task Group members may wish to visit sites within the city as well as further afield to see examples of good practice in developing and implementing local economic initiatives.</p>
	<p>Witnesses Set out who you want to gather evidence from and how you will plan to do this</p>	<p>External witnesses will be invited to provide written and oral evidence to the Task Group. These might include: Public sector employers and Private sector employers including Local small employers Local organisations including community based and youth organisations Schools and Colleges Trade Unions Other Local Authorities who have developed 'localism' agendas. The task group may hold evidence gathering sessions in one or more area in the City where there is evidence of economic exclusion.</p>

8.	Timescales How long is the review expected to take to complete?	<u>Five months</u>
	Proposed start date	November 2019
	Proposed completion date	April 2020
9.	Resources / staffing requirements Scrutiny reviews are facilitated by Scrutiny Officers and it is important to estimate the amount of their time, in weeks, that will be required in order to manage the review Project Plan effectively.	An estimated 20 days of scrutiny policy officer time will be required to research information, contact and negotiate with outside bodies and prepare a final report.
	Do you anticipate any further resources will be required e.g. site visits or independent technical advice? If so, please provide details.	. Yes. A small budget for the task group members to travel to Preston to see 'localism' in action is proposed. There may also be a need for 10 days of consultative work for an expert from one of the local Universities.
10.	Review recommendations and findings To whom will the recommendations be addressed? E.g. Executive / External Partner?	Recommendations will be addressed to the Executive
11.	Likely publicity arising from the review - Is this topic likely to be of high interest to the media? Please explain.	This issue is likely to generate media interest and coverage because of the nature of the topic and likely evidence presented to the Commission.
12.	Publicising the review and its findings and recommendations How will these be published / advertised?	In consultation with the media team. Member interviews may be required.
13.	How will this review add value to policy	The research and recommendations will underpin council knowledge and evidential base across a number of policy areas, including work being done to develop a jobs and skills strategy.

	development or service improvement?	
To be completed by the Executive Lead		
14.	Executive Lead's Comments The Executive Lead is responsible for the portfolio so it is important to seek and understand their views and ensure they are engaged in the process so that Scrutiny's recommendations can be taken on board where appropriate.	
To be completed by the Divisional Lead Director		
15.	Divisional Comments Scrutiny's role is to influence others to take action and it is important that Scrutiny Commissions seek and understand the views of the Divisional Director.	
16.	Are there any potential risks to undertaking this scrutiny review? E.g. are there any similar reviews being undertaken, on-going work or changes in policy which would supersede the need for this review?	No recognised risks at this point.
17.	Are you able to assist with the proposed review? If not please explain why. In terms of agreement / supporting documentation / resource availability?	
	Name	
	Role	
	Date	
To be completed by the Scrutiny Support Manager		
18.	Will the proposed scrutiny review / timescales negatively impact on other	

work within the Scrutiny Team? (Conflicts with other work commitments)	
Do you have available staffing resources to facilitate this scrutiny review? If not, please provide details.	
Name	
Date	

DRAFT

Leicester City Council Scrutiny Review

Adult Social Care Workforce Planning: Looking to the future

A review of the Adult Social Care Scrutiny Commission

10th September 2019

Background to scrutiny reviews

Determining the right topics for scrutiny reviews is the first step in making sure scrutiny provides benefits to the Council and the community.

This scoping template will assist in planning the review by defining the purpose, methodology and resources needed. It should be completed by the Member proposing the review, in liaison with the lead Director and the Scrutiny Manager. Scrutiny Officers can provide support and assistance with this.

In order to be effective, every scrutiny review must be properly project managed to ensure it achieves its aims and delivers measurable outcomes. To achieve this, it is essential that the scope of the review is well defined at the outset. This way the review is less likely to get side-tracked or become overambitious in what it hopes to tackle. The Commission's objectives should, therefore, be as SMART (Specific, Measurable, Achievable, Realistic & Time-bound) as possible.

The scoping document is also a good tool for communicating what the review is about, who is involved and how it will be undertaken to all partners and interested stakeholders.

The form also includes a section on public and media interest in the review which should be completed in conjunction with the Council's Communications Team. This will allow the Commission to be properly prepared for any media interest and to plan the release of any press statements.

Scrutiny reviews will be supported by a Scrutiny Officer.

Evaluation

Reviewing changes that have been made as a result of a scrutiny review is the most common way of assessing the effectiveness. Any scrutiny review should consider whether an on-going monitoring role for the Commission is appropriate in relation to the topic under review.

For further information please contact the Scrutiny Team on 0116 4546340

To be completed by the Member proposing the review		
1.	Title of the proposed scrutiny review	Scrutiny Review of 'Adult Social Care Workforce Planning: Looking to the Future'
2.	Proposed by	Cllr Melissa March, Vice Chair of Adult Social Care Scrutiny Commission
3.	Rationale Why do you want to undertake this review?	<p>Leicester has an ageing population who are living longer but often with complex comorbidities and ill health in later life.</p> <p>We have three times the national average of working age people in receipt of social care. When combined with nationally led cuts to prevention services, we have a real challenge in adult social care.</p> <p>Our care workforce is key to being able to support people to live on independence, dignity and safety, but the national crisis in adult social care workforce is deeply concerning</p>
4.	Purpose and aims of the review What question(s) do you want to answer and what do you want to achieve? (Outcomes?)	<p>The purpose of this review is to understand the adult social care workforce landscape in Leicester and what the plans are for the future, especially in light of growing needs for adult social care across our population in the city.</p> <p>The aim of the review is to gain an understanding of the perceptions of the adult social care workforce now and in the future. What gaps of people or skills might we face and what could we do to fill these.</p>
5.	Links with corporate aims / priorities How does the review link to corporate aims and priorities?	<p>This review links to Leicester City Council Adult Social Care Strategic priorities and plans, with consideration given to:</p> <ul style="list-style-type: none"> • The Care Act 2014 http://www.legislation.gov.uk/ukpga/2014/23/contents/enacted • The Better Care Fund • The Green Paper
6.	Scope Set out what is included in the scope of the review and what is not. For example which services it does and does not cover.	<p>The review will explore and identify 'what the perceptions are locally' to include:</p> <ul style="list-style-type: none"> • Workforce demand, capacity and forecasting • Financial resources and impacts • Training and staff development opportunities • IT initiatives and innovations • Risks and benefits to the service in planning a workforce for future need. <p>The review will not attempt to look at every area of the workforce but will identify key areas of high demand.</p>

7.	<p>Methodology Describe the methods you will use to undertake the review. How will you undertake the review, what evidence will need to be gathered from members, officers and key stakeholders, including partners and external organisations and experts?</p>	<p>The review evidence gathering will include:</p> <ul style="list-style-type: none"> • What are the major and smaller providers doing in relation to workforce planning; competing with others and addressing the skills gaps? • Engaging the views of staff to identify key issues and their ideas • How are we working with our local education providers e.g. Colleges, FEs, training, apprenticeships, and employment hubs. • What is the impact of Brexit/ restrictions on recruitment? • Best practice and supporting research reports
	<p>Witnesses Set out who you want to gather evidence from and how you will plan to do this</p>	<p>Evidence gathering will include potential witnesses, such as:</p> <ul style="list-style-type: none"> • Executive leads for Adult social Care and Jobs and Skills • Relevant adult social care service providers e.g. domiciliary care providers. • LCC Lead Executive Members • Adult Social Care staff • Local Education and Training providers • Adult Skills and Learning, LCC • Other Stakeholders?
8.	<p>Timescales How long is the review expected to take to complete?</p>	<p>6 months</p> <p>September - Scope to be agreed October to January - task group to gather evidence February – task group to prepare report of findings March – final review report to be presented</p>
	Proposed start date	October 2019
	Proposed completion date	March 2020
9.	<p>Resources / staffing requirements Scrutiny reviews are facilitated by Scrutiny Officers and it is important to estimate the amount of their time, in weeks, that will be required in order to manage the review Project Plan effectively.</p>	<p>The review can be conducted within the resources of the scrutiny team. It is estimated a total of three weeks of collective time over the proposed period will be required to support the review and prepare the report.</p>
	<p>Do you anticipate any further resources will be required e.g. site visits or independent technical advice? If so, please provide details.</p>	<p>No outside technical advice is envisaged to be needed. Potential site visits e.g. care homes</p>

10.	<p>Review recommendations and findings</p> <p>To whom will the recommendations be addressed? E.g. Executive / External Partner?</p>	<p>ALL recommendations will be directed to the City Mayor and Executive lead.</p>
11.	<p>Likely publicity arising from the review - Is this topic likely to be of high interest to the media? Please explain.</p>	<p>It is expected that this review will generate medium media interest and the Lead Directors, the Executive lead and the council's communications team will be kept aware of any issues that may arise of public interest.</p>
12.	<p>Publicising the review and its findings and recommendations</p> <p>How will these be published / advertised?</p>	<p>There will be a review report that will be published as part of the commission's papers on the council's website.</p>
13.	<p>How will this review add value to policy development or service improvement?</p>	<p>The review hopes to set out clearly the council's preparations and commitment to workforce planning and development.</p>
To be completed by the Executive Lead		
14.	<p>Executive Lead's Comments</p> <p>The Executive Lead is responsible for the portfolio so it is important to seek and understand their views and ensure they are engaged in the process so that Scrutiny's recommendations can be taken on board where appropriate.</p>	<p>I am pleased to support this review. I am particularly interested in any recommendations the task group may have on raising the status of the caring professions across communities in the city to aid long term workforce planning.</p> <p>Cllr Sarah Russell Deputy City Mayor, and Executive Lead for Social Care and Anti-Poverty</p>
To be completed by the Divisional Lead Director		

15.	<p>Divisional Comments</p> <p>Scrutiny's role is to influence others to take action and it is important that Scrutiny Commissions seek and understand the views of the Divisional Director.</p>	<p>Lead Director to complete this section</p> <p>Very supportive of ASC Scrutiny undertaking this T&F Review, as the future of the social care workforce continues to be a challenge nationally in terms of increasing demand for services and thus a need for increasing numbers of staff; high turnover and 'drop out' rates; and perceptions about the value of the role and career progression. A focus on local/City issues, perceptions of the challenge locally and the ideas, options and solutions that local organisations and employers can bring to improving future recruitment, retention and succession planning would be helpful in our approach as a commissioner and major employer in the workforce.</p>
16.	<p>Are there any potential risks to undertaking this scrutiny review?</p> <p>E.g. are there any similar reviews being undertaken, on-going work or changes in policy which would supersede the need for this review?</p>	<p>A correlation between the funding of care services and employee wage rates may be made and an overly simple solution identified that the Council as a major commissioner needs only to increase the rate it commissions services at to solve the challenges. Whilst there is no doubt a connection between rates of pay and recruitment and retention, there are other factors that play into the current challenges, and there is no one simple solution.</p>
17.	<p>Are you able to assist with the proposed review? If not please explain why.</p> <p>In terms of agreement / supporting documentation / resource availability?</p>	<p>Officers from SC&E will be able to develop a delivery plan for the T&F, engaging with the wider market, providing data and analysis.</p>
Name		Steven Forbes
Role		Strategic Director, Social Care and Education
Date		09/09/2019
To be completed by the Scrutiny Support Manager		
18.	<p>Will the proposed scrutiny review / timescales negatively impact on other work within the Scrutiny Team?</p> <p>(Conflicts with other work commitments)</p>	<p>It is anticipated that there will no adverse impact on the scrutiny team's work, to support this review but it must be anticipated that there may need to be some prioritising of work done during the time of this review.</p>

	Do you have available staffing resources to facilitate this scrutiny review? If not, please provide details.	The review can be adequately support by the Scrutiny Team as per my comments above.
	Name	Kalvaran Sandhu, Scrutiny Support Manager
	Date	09/09/2019

Leicester City Council Scrutiny Review

Scrutiny inquiry into
***‘The Underachievement of ‘Black Caribbean’
and ‘White British Working-Class’ pupils of
secondary school age in Leicester’.***

A Review Report of the Children, Young
People and Schools Scrutiny Commission
31 October 2019

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Children, Young People and Schools Scrutiny Commission - Task Group Members:

Councillor Mohammed Dawood (Chair)
Councillor George Cole (Vice-chair)
Councillor Elaine Pantling
Councillor Sue Hunter
Councillor Ted Cassidy

Chair's Foreword

There can be no doubt that the greatest gift a parent can give their child is a good education.

“Education is a powerful way of inspiring young people and I would like to see British schools put the values of respect and fairness at the heart of the curriculum”- Baroness Lawrence, April 2019.

The issue of ‘Underachievement of White British Working-Class and Black Caribbean (see section 4.6 for definitions of these terms) pupils in secondary education’ is complex and deep-rooted. The intention of this review is not to resolve what is a recurring problem, but to continue to highlight the issues and barriers faced by these two vulnerable groups. Deficits in aspiration; low expectation, school curriculum, disengagement from mainstream political process; loss of identity and deprivation are just some of the challenges that contribute to this complex problem.

It is recognised that the inability of successive government policies, and of decision makers to address the lack of academic progression in relation to Black Caribbean pupils over many decades has become an intergenerational problem that challenges government policies on equality for all. This can also be said of White British Working-Class pupils, which as a challenge has gained increasing prominence over the last decade.

We considered several areas that have formed the basis of the review, namely the educational landscape nationally and locally; the challenges experienced, and recommendations for the future. It is recognised that the academies agenda is transforming the educational landscape which in the long term will have an influence on attainment and academic success, however it is too early to predict the impact on the two groups being reviewed. However, the outcomes for children and young people in the city is still of great importance to the Local Authority.

In conclusion, it is evident that leadership and staff in secondary schools are hardworking and committed. We were impressed with their passion to support underperforming pupils, made more challenging because of limited budgets; stretched resources and an increase in numbers of pupils with complex issues.

A massive thanks to community individuals, schools, lead officers, youth workers and task group colleagues involved in the review, their contribution has been informative and valuable.

Councillor Mohammed Dawood

Chair, Children, Young People and Schools Scrutiny Commission

1. Executive Summary

Background to the Review and Key Findings

1.1. In 2014 Leicester City Council submitted evidence to the House of Commons Select Committee Inquiry on the underachievement of White British pupils in Leicester City. [House of Commons - Underachievement in Education by White Working-Class Children - Education Committee files](#) .

1.2. An extract from the evidence states:

'In parts of Leicester white working-class culture is characterised by low aspirations and negative attitudes towards education. The city faces many social challenges which affect the life chances of pupils; there is low achievement amongst white working-class boys; family-related issues play a key part in determining attainment outcomes; and the gaps in attainment widen through the key stages up to age 16 and beyond'.

1.3 In 2018 the Children, Young People and Schools Scrutiny Commission carried out a task group review and heard that similar issues relating to White British Working-Class persisted. A similar pattern of underachievement among Black Caribbean pupils has also persisted.

1.4 Leicester performance data for key stage 4 (KS4) in 2015/16 shows progress and attainment for White British and Black Caribbean pupils was well below average in key performance indicators (KPIs). This is a contrast to other groups in the city e.g. Indian, Black African, and other Asian. This is evidenced in the Leicester City Council annual education performance reports. <http://www.cabinet.leicester.gov.uk:8071/documents/s76854/Annual%20Education%20Performance%20ReportFIN.pdf>

1.5 Department for Education (DfE) national ethnicity data reinforces the underachievement at secondary school level key stage 4 of White British working-class and Black Caribbean pupils, this is evidenced in national DfE performance reports [2015 to 2016 DfE ethnicity data key stage 4.pdf](#). **In addition, review work carried out by Lambeth Council shows a similar position to that in Leicester. The Lambeth research findings show:**

- The reasons for the underachievement of Black Caribbean pupils are wide-ranging and complex. Seven key factors were identified as main reasons for persistent underachievement in English schools:
 1. Headteachers' poor leadership on equality issues
 2. Institutional racism
 3. Stereotyping
 4. Teachers' low expectations
 5. Curriculum barriers and relevance
 6. Lack of diversity in the work force
 7. Lack of targeted supporthttps://www.lambeth.gov.uk/rsu/sites/www.lambeth.gov.uk/rsu/files/black_caribbean_underachievement_in_schools_in_england_2017.pdf
- The good practice findings showed that Key Stage 2 and GCSE results have improved significantly in the case study schools, despite

a national trend of underperformance. There were a number of reasons why Black Caribbean pupils were doing well and key features and success factors included:

1. Headteachers' excellent leadership on diversity and equality issues.
2. Effective teaching and learning
3. Use of a relevant inclusive curriculum
4. Parental engagement
5. Link with the community
6. The work of learning mentors in supporting Black Caribbean families
7. Church and community support and guidance
8. A clear stand on racism
9. Diversity in the school workforce
10. Celebration of cultural diversity
11. Effective use of pupil voice

https://www.lambeth.gov.uk/rsu/sites/www.lambeth.gov.uk/rsu/files/the_achievement_of_black_caribbean_pupils_-_good_practice_2017_0.pdf

- The reasons for underachievement of White Working-Class pupils is a perceived lack of aspiration amongst parents for their children's future and a lack of engagement in their schooling, the failure of the National Curriculum to reflect adequately the needs of White British Working-Class pupils. It is also perpetuated by factors such as:

1. Economic deprivation
2. Feelings of marginalisation within the community exacerbated by housing allocation
3. A lack of community and school engagement
4. A perception that their identities are not being affirmed in school
5. Low literacy levels and parental low aspiration of their children's education.

https://www.lambeth.gov.uk/rsu/sites/www.lambeth.gov.uk/rsu/files/Raising_the_Achievement_of_White_Working_Class_Pupils-School_Strategies_2010.pdf

- The good practice findings showed that there are a number of reasons why White Working-Class pupils and other groups are doing well in schools, despite low attainment at entry and challenging socio-economic circumstances in the area served by case study schools. Key features and success factors include:

1. Strong and inspirational leadership by the headteacher
2. High expectation for all pupils
3. An inclusive curriculum that raises aspiration and meets the needs of the White Working-Class
4. Close links with parents and increasing community support
5. Effective use of data and rigorous monitoring systems
6. Good and well-targeted support for White Working-Class pupils
7. Effective support for language development

8. Good support for the transition between primary and secondary
9. Celebration of cultural diversity and a strong commitment to equal opportunities.

https://www.lambeth.gov.uk/rsu/sites/www.lambeth.gov.uk.rsu/files/Raising_the_Achievement_of_White_Working_Class_Pupils-School_Strategies_2010.pdf

- 1.6 The task group heard that White British Working-Class pupils and Black Caribbean pupils who are underachieving at secondary school are likely to face a combination of disadvantages – at home, in school, or through personal circumstances, examples relate to:
- Attending a less well-performing school e.g. Ofsted ratings ‘requires improvement’ or ‘inadequate’ (*although it is recognised that schools rated ‘inadequate’ are required to become academies – evidenced in paragraph 6.7 & 6.8*)
 - Access to targeted support and supplementary learning opportunities
 - Assessed as having special education needs or complex needs
 - Parental and school engagement issues
 - School attendance and /or behaviour issues
 - Background and /or ethnicity e.g. poverty, discrimination; racism; bullying
 - Low expectations by teachers and aspirations on the part of pupils
 - Access to early intervention services from support agencies e.g. health and wellbeing, safeguarding or special needs assessment services.
- 1.7 Schools’ provision has changed radically with many schools having become academies. The task group identified that it can be confusing to understand the governance; lines of management and responsibility for schools and that it would be helpful for both elected members and parents to have a better understanding of the Council’s role and approach to monitoring and influencing performance outcomes particularly in relation to academies.
- 1.8 School budgets and provision for youth activities in the city are facing severe challenges which impact on young people and schools. The task group identified that schools are experiencing increasing numbers of pupils with low attainment and complex needs. We ask that the council executive address these funding gaps, and or look into alternative funding options.
- 1.9 The task group identified that the reasons for persistent pupil absence in a couple of city secondary schools can be varied and complex e.g. identified higher levels for white working-class boys. Persistently absent are those who have 10% of more absence, data shows that the number of city secondary pupils classed as persistent absentees in Autumn and Spring 2016/17 is 2,851 pupils. The task group praised the council’s Education Welfare Team who work closely with schools and with families using a range of methods to motivate parents and children to encourage and improve attendance.

- 1.10 Youth workers are a valuable resource for secondary schools. We identified that youth workers have a wide experience of how to approach young people facing challenging issues. We believe youth workers are ‘informal educators’ well placed to support schools to work with underachieving pupils.
- 1.11 The task group identified that support and encouragement for Black Caribbean parents and families would enable them to be more proactive in their children’s education through participation on school governing bodies; parents’ associations, local churches and through collective networking with other parents. The task group identified a range of further work to be explored to support raising achievement for Black Caribbean pupils (*listed in recommendations section*).
- 1.12 New approaches to better engage parents with schools and to be more closely involved in their children’s wellbeing and learning journey should be explored for example this could include involving youth workers; mentors; parenting skills; free supplementary learning and alternative pathways.
- 1.13 The task group felt that “as a city we need to create a culture of much higher expectations for young people in all our schools, in our society and community, and in partnership with parents”. The task group felt that joint working locally and nationally was a positive approach that could be considered through for example the sharing of knowledge, guidance and toolkits.

GOOD PRACTICE IN SCHOOLS

- 1.14 Secondary schools have the drive to support underachieving pupils. There are a wide range of approaches and programmes to help raise aspirations and improve self-esteem, as well as academic intervention. Examples include:
- Flexibility of courses for students
 - Aspirational learning
 - Vocational routes
 - Access to role models and business leaders
 - Investing in teachers and quality of teaching
 - Better engagement with feeder schools
- 1.15 The task group identified many areas of good practice by secondary schools, this is expanded on below:

Good Practice identified in Leicester Secondary Schools

- 1.16 Secondary schools have demonstrated ambition and drive in their efforts to support underachieving pupils. The task group were informed by the schools

they visited and the staff they spoke to of a wide range of approaches and programmes to raise aspirations and improve self-esteem as well as academic intervention, some examples that were provided are:

- Flexibility of courses for students - To offer students more flexibility in choices of courses and encouragement to follow their interests in a way which engages them in learning e.g. health and beauty, construction skills or a 'pick and mix' of vocational courses. More curriculum options that provide high quality vocational opportunities linked to strong progression routes and include curriculum-related activities such as trips and visits to businesses, charities, or cultural venues etc.
- Aspirational learning - '*Best Self*' and '*Positive Future Selves*' initiatives for students to take control and write about their life journey and aspirations (making it real). This helps them to respect themselves and others, develop and display independence, resilience, leadership, positive attitude and self-management skills.
- Vocational routes - Vocational routes are providing good opportunities for pupils. The task group recognised this as good practice approach and believe that more can be done to prepare children for the world of work, whether that is through a vocational or academic route.
- Inviting role models and business leaders – Inviting into school role models (ex-students or celebrities) to talk about their experiences to motivate students to believe in themselves to achieve better. Inviting local sports role models and business leaders, and organising site visits to local enterprises and businesses.
- Investing in teachers and quality of teaching – The ethos is to put extra resources into training and developing teaching staff to improve quality of lessons. This is already helping to engage students in learning. Investing in teachers and teaching the right curriculum is key to raising achievement.
- Better engagement with feeder schools – Offering primary feeder school pupils taster day sessions along with early engagement with parents, to support the transition from primary to secondary. Older pupils offering 'buddy mentor support' to new year 7 intakes. Secondary school staff and leadership teams have improved their liaison work with primary feeder schools to ensure smoother transitions e.g. earlier liaison work, and pupils visiting initiatives e.g. sports events

- School measures in city schools to promote good attendance over the last few years have included award schemes; close working with Education Welfare Officers (EWO); more extra-curricular activities; breakfast and attendance clubs; raised awareness of attendance through publicised attendance levels in Y7; peer mentoring; special learning environments and negotiated timetables for returners; introduction of first day calling; attendance panels; improvements to school ethos and facilities; individual counselling.
- Pupils value reward schemes which motivates them to do well e.g. bronze, silver and gold positive behaviour points. Schools cited how as a result the number of incidents of poor behaviour significantly reduced for all groups of pupils.

2. RECOMMENDATIONS

The Assistant Mayor for Children, Young People and Schools and the Executive are asked to consider the following recommendations (which have been grouped into four themes) and the conclusion (page 11) as a way forward.

Theme 1: Actions for Schools

- 2.1. To request that the good practice identified by Lambeth Council be shared in Leicester. Schools and leads in education improvement to consider the research reports as an additional aid to help raise achievement. (*source:1.5, 4.7, 7.8, 8.10 & 8.21*).
- 2.2. Some schools receive Pupil Premium funding (PPF) to help raise attainment among disadvantaged students. Secondary schools should consider how this fund could be channelled to boost outcomes specifically for Black Caribbean and White British working-class students. (*source 6.8 & 6.13*).
- 2.3. Parents should be helped to understand how to interpret school performance measures, as this would encourage them to support their children, and assist them with school selection choices. (*source:8.6*)
- 2.4. Schools should consider new approaches to strengthen relationships with Black Caribbean and White British working-class parents and families to support their children's progress. (*source: 6.15 & 7.22*).
- 2.5. Schools and School Governing bodies should be encouraged to recruit Black Caribbean and White British working-class governors to help parents, community and schools break down barriers and influence pupil performance strategies. (*source:7.24*)

- 2.6. Schools be encouraged to (source:7.15 & 7.16 & 7.17)
- a. Involve Black Caribbean teachers at leadership levels and education performance forums
 - b. Recruit and support the career progression of Black Caribbean teachers.
 - c. Provide additional support to Black Caribbean trainee teachers. Schools should consider the use of the Stephen Lawrence Charitable Trust handbook to help pupils develop the skills and confidence to challenge racism and discrimination and to embrace inclusion.
- 2.7. Schools should consider the use of the Stephen Lawrence Charitable Trust handbook to help pupils develop the skills and confidence to challenge racism and discrimination and to embrace inclusion.
([Stephen Lawrence resources web link](#)) (source:6.13)
- 2.8. Schools and the Council to consider key impacts of the council's Early Help Strategy in supporting raising achievement for Black Caribbean and White British Working-class pupils. (source: 6.22)

Theme 2: Actions for Council Officers

- 2.9. The task group recognised that youth workers are a valuable resource who may be able to help secondary schools to address the challenges and issues facing Black Caribbean and White British working-class students who are underperforming. Whilst recognising the financial constraints facing this service, consider possible ways this experience can be shared or used including a possible pilot approach (source 1.8, 6.14 & 6.15).
- 2.10. The council should set out clearly to elected members, parents and other key stakeholders how it engages with and influences the performance outcomes of pupils attending all schools, including academies, in the city. (source: 6.7b).
- 2.11. Good school attendance is vital and pupil absences can lead to educational and societal problems, consider a city-wide campaign to raise awareness about the links between good school attendance and grades / prospects. (source:8.16).
- 2.12. That good practice within higher-performing secondary schools be identified by education service improvement leaders and shared to support and mentor lower-performing secondary schools in the city. The Children, Young People and Schools Scrutiny Commission would welcome a report on the work being done and future proposals. (source: 6.13a & 7.31).

Theme 3: Actions for Elected Members

- 2.13. Elected members be encouraged to: (source: 6.7a)
- a) Regularly visit schools within their wards to better understand the challenges faced by schools, and issues impacting on young ward citizens and the wider community.
 - b) Become school governors to work closely with schools on improvement measures, strategies and better engagement, and to influence performance outcomes for students.

Theme 4: Further work to be explored

The following are possible areas to explore further in tackling this complex challenge and which may assist in providing new insights and in identifying other solutions, whilst recognising that any further work may be constrained by availability of resources both within the Council and schools.

- 2.14. The task group were aware that Leicester City Council and other employers have had success in encouraging and supporting apprenticeships and alternative pathways for disadvantaged young people and NEETs in the city. To explore further how employers can provide guidance and support to Black Caribbean and White British working-class young people. (source: 6.20)
- 2.15. The task group identified that there is a lack of Black Caribbean community support networks for young Black Caribbean's in the city. We suggest that a 'mapping exercise' in partnership with the community be explored. (source: 7.26).
- 2.16. The task group identified that secondary school choices and allocations is likely to impact on performance outcomes for Black Caribbean pupils. We suggest that this be explored further, for example allocations data for 1st, 2nd, or alternative secondary school places compared with other cohorts. (source: 7.11).
- 2.17. Analysis of turnover rates and findings from exit interviews for Black Caribbean teachers and trainees in Leicester be explored further. (source: 7.16).
- 2.18. New approaches to be explored in partnership with the community to encourage Black Caribbean parents to boost their children's learning opportunities e.g. supplementary learning. (source: 7.27).
- 2.19. The task group identified that good parenting skills are the building blocks to help disadvantaged families in the city. To explore new approaches to support parents who feel isolated and disengaged with schools for example as shown by the Lambeth research case studies. (source: 7.20, 7.22 & 8.16).

- 2.20. Schools and communities in partnership with the council to explore new approaches to reconnect pride and celebration with White British working-class and Black Caribbean history and culture. (source:7.25 & 8.14).
- 2.21. The task group suggested that De Montfort University and Leicester University be approached to explore possible programmes and support they could offer to Black Caribbean trainees (source: 7.17).
- 2.22. The Sutton Trust (a government body) is calling for a renewed effort to close the attainment gap between disadvantaged students and their better off classmates. (source:5.3 & 5.4).
<https://www.suttontrust.com/newsarchive/white-working-class-boys-have-lowest-gcse-grades-as-disadvantaged-bangladeshi-african-and-chinese-pupils-show-dramatically-improved-results/>

The Sutton Trust recommendations included:

- Schools implement targeted improvement programmes for those students at risk of falling behind, including white working-class children.
- The government should consider incentives to encourage more highly-qualified teachers to teach in deprived schools.

We suggest that the City Mayor & Executive Lead write to the Government to call for Government support for such actions.

3. CONCLUSION

- 3.1 The problems set out in this report are complex, multi-faceted and deep-seated. Their nature pre-dates the cuts imposed on local government and education over the past decade, but those cuts have now made it harder to respond to the issue of under-achievement within the identified communities.
- 3.2 The evidence is that the issues lie within, but also outside the education system. The problems within schools are a symptom of wider issues. But schools are where the problems come together in the most dramatic way.
- 3.3 Schools therefore, should be the base within which any strategy or programme of actions should take place. However, it is recommended that the wider issues of alienation and under-performance should also come into play.
- 3.4 Therefore we suggest that two schools or academies, one working within each identified community, be asked to support the creation of a multi-agency group aimed at dealing with the full range of issues contributing to the picture this report has set out.
- 3.5 They should include input from health, public health, police, adult and children's social care, youth community engagement as well as community-based arts projects. The team should concentrate in the first instance on

working with the first cadre of children within those communities moving into the first year of secondary education. Structures could include out of hours learning, including lunch and holiday clubs.

- 3.6 The building of community support for parent-supported learning groups, of which there are examples in other communities within the city, should be pursued, if possible, with the help of those communities.
- 3.7 There are no easy solutions for the problems in these communities, and it is not suggested that this is an easy solution. But it has the advantage of being the first step in a long journey.

4. REPORT

Introduction

- 4.1 In November 2018 the Children, Young People and Schools Scrutiny Commission (CYPS) set up a task group to carry out a review into 'The underachievement of White British working-class pupils and Black Caribbean pupils of secondary age education in Leicester City'.
- 4.2 In Leicester City the education performance reports 2016 to 2018 highlight trends of underachievement at Key Stage 4, for White British Working-Class and African Caribbean pupils as shown in ethnicity data charts at Appendix A.

Purpose of review

- 4.3 To explore and begin to understand the complex issues and barriers that impact on the underachievement of Black Caribbean and White British working-class pupils, with a focus on secondary age, key stage 4 level.

Method of review

- 4.4 The approach taken by the task group was to gather evidence from invited witnesses plus a small sample of secondary schools in the city. The evidence taken has been anonymised. Evidence came from:
- research reports, media articles and council reports
 - education performance data and reports
 - A small sample of secondary schools in the city (3)
 - A small sample of youth workers (5)
 - A small sample of community representatives (4)
 - Lambeth Council research studies
- 4.5 The review evidence has focussed on the above, however the task group intends to share the report findings and recommendations wider at a later stage and to receive responses back to Children's Scrutiny e.g. with Education Forums; Schools Partnerships and agencies that support schools.

Definitions

4.6 The following sets out the terms used in the report and their definitions:

- *Black Caribbean*: this refers to British African-Caribbean people who are residents of the United Kingdom whose ancestors were primarily indigenous to Africa
- *White British Working-class*: King's College London recently adopted a definition of 'white working class' developed by Lambeth Council (Lewis and Demie, 2015). According to this definition white working-class pupils are of White British declaration and have the following characteristics:
 - Parents are in skilled and semi-routine occupations
 - Parents depend on the welfare state for their income
 - All pupils eligible for free school meals or pupil premium

The Cabinet Office (2017) states: *While pupils eligible for free school meals have low attainment on average than their non-eligible peers, the impact of deprivation on White Working-Class pupils (and boys in particular) is more pronounced than in other groups.*

Lambeth Research Studies

4.7 Recent research by Lambeth Council identifies the causes for these two underachieving cohort groups and highlights good practice to help raise achievement. The task group found that the Lambeth research in many ways reflected the position in Leicester. The task group submits the two reports (links below) as valuable supporting evidence to share wider as a resource for schools; the council and partners involved in raising education achievement in Leicester. **RECOMMENDATION 2.1**

The task group is grateful to the authors of these reports for their permission to share the good practice research in this study.

- a) 'The Achievement of Black Caribbean Pupils - Good Practice' by *Feyisa Demi and Christabel McLean*.
https://www.lambeth.gov.uk/rsu/sites/www.lambeth.gov.uk/rsu/files/the_achievement_of_black_caribbean_pupils_-_good_practice_2017_0.pdf
- b) 'Raising the Achievement of White Working-Class Pupils – Barriers and School Strategies' by *Feyisa Demie and Kirstin Lewis*.
https://www.lambeth.gov.uk/rsu/sites/www.lambeth.gov.uk/rsu/files/Raising_the_Achievement_of_White_Working_Class_Pupils-School_Strategies_2010.pdf

5. National evidence

5.1 The task group recognised that many research studies and media articles relating to this review topic exists. The studies by Lambeth Council (see 2.5) stand-out as the most valuable in terms of good practice models. Other research and media articles are highlighted below and throughout the report.

5.2

The latest official figures show the scale of the challenge nationally to tackle the education attainment gap, for students from disadvantaged backgrounds. By age 19 over 164,000 students – 30% of the total cohort – had still not achieved a good standard of recognised qualifications in English and Maths. Worryingly, this includes a majority (50.2%) of all students who had been eligible for free school meals (fsm).

Source: Education Endowment Foundation 2017

(The Education Endowment Foundation is an independent charity set up to improve the educational attainment of the poorest pupils in English schools. The EEF aims to support teachers and senior leaders by providing evidence-based resources designed to improve practice and boost learning). <http://www.educationendowmentfoundation.org.uk/>

5.3 The Sutton Trust (*a foundation dedicated to improving social mobility through education*) said that it was “particularly concerning” that white working-class pupils still perform badly. Recent research by the Sutton Trust ‘[Class Differences](#)’, highlights how the academic attainment of disadvantaged pupils at 16 varies dramatically between different ethnic groups Key findings highlighted:

‘In the past 10 years certain ethnic minority (free school meals) pupils have improved substantially more than the national average on attainment at GCSE (such as Chinese, Bangladeshi and Indian), however others such as Black Caribbean and White Working-Class still struggle.’

5.4 In light of this, the Sutton Trust is calling for a renewed effort to close the attainment gap between disadvantaged students and their better-off classmates. Recommendations included that:

- Schools implement targeted improvement programmes for students at particular risk of falling behind, including white working-class children.
- Schools use evidence from the Education Endowment Foundation’s [Teaching and Learning Toolkit](#) to improve outcomes.
- The government should consider incentives to encourage more highly-qualified teachers to teach in deprived schools.
- Government and schools create more opportunities for disadvantaged ethnic groups to supplement core lessons, including through enrichment vouchers.

The task group suggest that the City Mayor & Executive Lead write to the Government to call for Government support in addressing these actions
RECOMMENDATION 2.22

5.5 Sir Peter Lampl, Chairman of the ‘Sutton Trust’ and of the ‘Education Endowment Foundation’, stated:

“The fact that Indian, Bangladeshi and Chinese pupils from poor homes are performing better than the national average is in itself a great achievement. This may reflect a strong cultural appreciation of education from which we can all learn. But it is worrying that there is such a disparity in the achievement of different ethnic groups at GCSE and particularly concerning that white working-class pupils continue to perform so poorly. [Harnessing that same will to learn that we see in many ethnic minority groups in white working-class communities should be a part of the solution to the low attainment of many boys and girls. We need a more concerted effort with white working-class boys in particular. This should ensure that every pupil, regardless of family income, gender or ethnicity has the chance to succeed](#)”.

5.6 Other research from the ‘[Social Market Foundation’s Commission on Inequality in Education](#)’ has found that poorer pupils were more likely to be affected by four teaching factors which contribute to worse educational outcomes facing a ‘cocktail of disadvantage’ – they are:

- more likely to have unqualified teachers,
- non-specialist teachers,
- less experienced teachers, and
- have a high turnover of teachers.

(The Social Market Foundation’s Commission on Inequality in Education is an independent, cross-party initiative which is examining the causes and effects of inequality in education at primary and secondary levels in England and Wales). <http://www.smf.co.uk/commission-on-inequality-in-education/>

6. Leicester City context

The source of data for this section is taken from Leicester’s demographic profile 2015:

<https://www.leicester.gov.uk/media/183446/cyp-jsna-chapter-one-setting-the-context.pdf>

6.1 Population - Leicester is a fast-growing city. Our population is estimated to be 342,627 and is forecast to rise at a faster rate than England to 404,000 by 2038. Children and young people under 20 make up a quarter of the population and 61% of the population are under 40.

6.2 Poverty - More than 34,000 children are growing up in poverty. Research by the *End Child Poverty Coalition* has laid bare the struggles facing many families in the city. The campaign has looked at deprivation rates in 650 parliamentary constituencies and found Leicester South was the 13th worst area where 40.59% of children - 12,509 - are mired in poverty. In Leicester

West 10,290 youngsters (37.4%) are living under the Government's defined poverty level and 11,642 (39.4%) in Leicester East.

Leicester City Education provision 2018

- 6.3 Primary Schools: • 56 LA maintained, • 26 Academies
Secondary Schools: • 10 LA maintained, • 9 academies
Special Schools: • 9 LA maintained, • 1 academy
Due to convert to academy status in 2018/19: • 7 primary schools,
• 6 secondary schools
- 6.4 We have 11 Multi-Academy Trusts (MATs) (with two Single Academy Trusts (SATs) and might expect about 15 MATs by the end of next academic year (2019).
- 6.5 Leicester City Council's ambition is for ALL schools in the city to be judged good or outstanding by Ofsted and to increase the attainment of young people to at least national averages. The Education Performance Service plays a lead role in this for the local authority with maintained LEA schools and has a strategy of engaging with academies and Multi-Academy Trusts to contribute appropriately to improving standards across the sector.
- 6.6 The task group were aware that the national and local landscape for education and schools is changing rapidly. Over the last few years many schools in the city have become or are converting to academy schools.
- 6.7 Minute Extract 22nd August 2017 from Children, Young People and Schools scrutiny commission, re: Annual Education Performance Report 2016, states:
- 'Councillor Russell, Lead Executive member, noted that the local authority was in a difficult position with the amount of work it could do to support schools as a result of the impact of government drive to convert schools to academy. There was ongoing work sharing best practice and it was important to identify any slippage and to have performance dialogues with schools, brokering relationships with other schools doing well and to support them with the right information and best practice.*
- With regards to the curriculum commission members were informed that as changes happened in a particular year it took time to get through to GCSE stage, so those in KS2 and KS4 at the moment were facing the challenge of meeting that change in the curriculum. It was also noted that for some GCSE's this year would see new grading.*
- In terms of academies there were now a combination of convertors and sponsor academies which by definition had poor prior attainment, although the view was that all were Leicester City Schools and so they were not separated out and the data in the report contained all children in Leicester except for those in independent schools'.*
- <http://www.cabinet.leicester.gov.uk:8071/documents/g8190/Public%20reports%20pack%20>

Children, Young People and Schools Scrutiny Commission:

Scrutiny councillors questioned whether positive outcomes for pupils had increased through academisation?

The Deputy City Mayor with responsibility for Children and Young People's Services, stated: *"Although schools in the city have converted to academies for a variety of reasons, most in the city wanted to continue to work with the Local Education Authority (LEA). This was encouraged by the LEA, although it was recognised that some academies engaged more productively than others. The welfare of students in the city is the responsibility of the council, however it did not have responsibility for student outcomes at academies in the city. The LEA has regular contact with the Regional Commissioner responsible for Academies, and in terms of engaging with academies, it depends on which chain of academies schools are part of"*.

Scrutiny councillors expressed concerns about the authority's inability to enforce any action they might deem appropriate to make improvements. Councillors raised concerns about:

- a) Where to direct people who have problems with academies relating to their children (particularly if they are unhappy with the way an academy has handled an issue or complaint).
- b) The council has responsibility for LEA maintained schools' performance outcomes of pupils. The council needs to set out clearly how it intends to engage and influence the performance outcomes of pupils attending academies. **RECOMMENDATION 2.10**

- 6.7a The task group recommend that elected members be encouraged to:
- Regularly visit schools within their wards to better understand the challenges faced by schools, and issues impacting on young ward citizens and the wider community.
 - Become school governors to work closely with schools on improvement measures, strategies and better engagement, and to influence performance outcomes for students.
 - **RECOMMENDATION 2.13**

- 6.8 The task group was aware that over the last few years some secondary Schools in the city were rated by Ofsted as *'Inadequate'* or *'Requiring Improvement'*. This is likely to impact on pupils' attainment and performance outcomes, in particular where Ofsted identified concerns about the quality of teaching, learning and assessments. *(However it is noted that 'inadequate' rated schools have become 'Academy' status' schools).*

Pupil Premium' is additional money for schools. It was introduced by the government in 2011 as a funding allocation to tackle the attainment gap for underperforming pupils. The government has since broadened out the allocation criteria to include other categories of disadvantage, such as children who are looked after by local authorities.

The Pupil Premium is a valuable focus for closing the attainment gap – but it is important schools consider how they can best use all their resources to improve the quality of teaching as this will benefit all pupils, particularly the most disadvantaged and those underperforming most.

The '*Education Endowment Foundation*' forecasts across the next five years, 2017 to 2021, GCSE attainment gap widens slightly based on Progress 8; and narrows slightly based on Attainment 8 scores. However, to help close the attainment gaps secondary schools need to take steps now to boost GCSE outcomes for their Pupil Premium-eligible pupils. **RECOMMENDATION 2.2**

- 6.9 Tables 1 and 2 below (6.12) shows key performance measures known as 'Progress 8' and 'Attainment 8' used to highlight the overall performance for Leicester Secondary Schools at Key Stage 4, GCSE results, showing Black Caribbean pupils and White British working-class pupils with low scores, and the gap widening compared to national data.

'Progress 8' is a measure of the progress children make between the end of primary school and the end of secondary school. It is designed to encourage good quality teaching across a broad curriculum. 'Attainment 8' is a measure of a pupil's average grade across a set suite of eight subjects. These measures are a type of value-added measure, which means that pupil's results are compared to the actual achievements of other pupils with similar prior attainment.

2016 to 2018 Key Stage 4 Attainment by Ethnicity

- 6.10 The progress and attainment of the following groups were well below average in all three performance indicators (Attainment 8, English Progress 8 and mathematics Progress 8):
- White British / White Other / Black Caribbean / Black Other / White/Black Caribbean / Black African and White / White and Asian / Any other mixed background / Irish / Gypsy/Roma / Travellers of Irish Heritage.
- 6.11 The progress and attainment of the following groups were above average in all three performance indicators (Attainment 8, English Progress 8 and mathematics Progress 8):
- Indian / Other Asian / Black African (exc. Somali) / Black Somali

6.12 Table 1 shows 2018 Progress 8 Score ethnicity data:

Progress 8 Score

	White British	Black African (exc Somali for LA)	Black Somali	Black Caribbean	Black Other	White/Black Caribbean	Black African and White	All Pupils
2018: Progress 8 score								
Leicester City	-0.74	0.22	0.12	-0.84	-0.22	-0.82	0.23	-0.04
National	-0.14	0.31		-0.30	0.08	-0.37	0.01	-0.02
Gap to National (All Pupils)	-0.72	0.24	0.14	-0.82	-0.20	-0.80	0.25	-0.02
2017: Progress 8 score								
Leicester City	-0.50	0.24	-0.10	-0.69	-0.04	-0.76	0.03	-0.01
National	-0.14	0.37		-0.23	0.03	-0.33	0.08	-0.03
Gap to National (All Pupils)	-0.47	0.27	-0.07	-0.66	-0.01	-0.73	0.06	0.02

Results in green highlight where attainment is better than All Pupils in Leicester.

- **The attainment of Black Caribbean pupils is low** compared to All Pupils and Nationally. The gap has widened by 0.16 from 2017 to -0.82, and is the largest gap to National of these reported ethnicities.
- **The attainment of White British pupils is low** compared to All Pupils and Nationally. The gap to National has widened by 0.25 since 2017 to -0.72.

Table 2 shows Attainment 8 Score ethnicity data:

Attainment 8 Score

	White British	Black African (exc Somali for LA)	Black Somali	Black Caribbean	Black Other	White/Black Caribbean	Black African and White	All Pupils
2018: Attainment 8 score								
Leicester City	35.1	45.7	45.0	34.0	40.8	35.5	48.8	42.8
National	46.1	47.5		39.6	43.0	41.3	46.5	46.6
Gap to National (All Pupils)	-11.5	-0.9	-1.6	-12.6	-5.8	-11.1	2.2	-3.8
2017: Attainment 8 score								
Leicester City	38.0	43.3	41.8	31.1	42.0	33.3	41.1	42.8
National	45.9	46.9		40.5	42.6	41.3	47.1	46.3
Gap to National (All Pupils)	-8.3	-3.0	-4.5	-15.2	-4.3	-13.0	-5.2	-3.5

Results in green highlight where attainment is better than All Pupils in Leicester.

- **The attainment of Black Caribbean pupils is low** compared to All Pupils and Nationally. The gap has narrowed 2.6% since 2017 to 12.6%, however it is the largest gap of these reported ethnicities.
- **The attainment of White British pupils is low** compared to All Pupils and Nationally. The gap to National has widened 3.2% since 2017 to 11.5% and it is the 2nd largest gap of these reported ethnicities (Black Caribbean pupils had the largest gap to National).

6.13 The task group were informed about valuable sources and guidance for schools to raise attainment levels, for example:

Pupil Premium - Use the Pupil Premium Awards case studies to find out how the most successful schools are spending their funding to raise disadvantaged pupils' attainment:

<http://www.pupilpremiumawards.co.uk/ppawards2015/2013>

Education Endowment Foundation - The teaching and learning toolkit currently covers 34 topics, each summarised in terms of their average

impact on attainment, the strength of the evidence supporting them and their cost: <http://educationendowmentfoundation.org.uk/toolkit/>

The Sutton Trust - Use the Sutton Trust/EEF Teaching and Learning Toolkit to identify evidence-based strategies for raising attainment: <https://educationendowmentfoundation.org.uk/toolkit/toolkit-a-z/>

Schools should consider use of the Stephen Lawrence Charitable Trust handbook to help pupils develop the skills and confidence to challenge racism and discrimination and to embrace inclusion. ([Stephen Lawrence resources web link](#)) **RECOMMENDATION 2.7**

- 6.13a The task group praised the dedication of school staff for introducing new schemes and initiatives to support pupils and raise performance. The good practice across all schools in the city should be published and shared to support less-performing schools. **RECOMMENDATION 2.12**

Youth Workers supporting young people in the city

- 6.14 The task group identified that youth workers are a valuable resource to support schools in the city. It was evident from discussions with them that youth workers in Leicester were passionate about helping young people and may be well-placed to help schools by sharing their years of experience. However, it was recognised that financial and resource constraints could make this challenge for youth services. Some examples of youth workers good practice in Leicester:

- Youth workers are informal educators - In previous years youth services were a visible service in schools which worked well and complemented the learning setting. Youth workers supported teaching staff with pupils facing challenges and issues e.g. targeted approach for boys. This approach to be re-considered as a resource within schools. **RECOMMENDATION 2.9**

- Identified that Youth Workers have ample experience of how to approach young people facing challenging issues – an example given: *one of the successful tools used is a 'route-map' which is a solution-based method to enable young people to think about basic issues and problem-solving e.g. housing, money advice, wellbeing.*

- 6.15 The task group recommend that the role and experience of youth workers in supporting underachieving Black Caribbean and White British Working-Class pupils be considered as a positive idea to be taken forward. **RECOMMENDATION 2.9**

Exclusions and Absences

6.16

“Police Commissioners across the country have written to the Prime Minister saying pupils both formally and informally excluded are being “sucked into criminality”, and that cuts to school funding and youth services mean that “interventions” for youngsters in need are not happening. The letter also called for unofficial exclusions, known as off-rolling, to be outlawed”.
Source: BBC News Website 2019

6.17

‘There is a strong correlation between pupil absences and attainment’ according to the Department for Education (DfE). [Black Caribbean pupils are disproportionately likely to face temporary or permanent exclusion from school \(DfE 2018\)](#). Exclusion rates nationally from 2009/10 to 2015/16 for Black boys was high at 52.7% per 1,000 and mixed or multiple ethnicity 31.0 per 1,000. The reasons behind high exclusion rates are varied and complex.

6.18

The task group noted that exclusion rates in Leicester are on the whole well below national rates.

A Recent Ofsted inspection report at secondary school stated: that the proportion of pupils excluded had continued to reduce, although this was still higher than the national average. Leaders, along with the help of governors, have worked hard to improve communication and relationships with families and this has been successful in reducing the number of exclusions. Ofsted stated: ‘the school is aware of our concerns about the over-representation of boys among those that have been excluded. The introduction of your internal exclusion unit is helping to target pupils, and early indications from your current records give cause for cautious optimism. Fixed-term exclusions have been high in the past but are reducing as a result of new systems for managing behaviour. There have been no permanent exclusions for several years.

6.19

The task group heard from two schools in the city that persistent pupil absence is an issue and could be for other schools also. The impacts of persistent absence that were cited included the impacts on a school’s reputation, ability to meet targets, lowered school attainment as well as an unsettling effect on staff morale. According to the council’s Education Welfare Service children who are persistently absent are those who have 10% or more absence data shows that the number of city secondary pupils classed as persistent absentees in Autumn and Spring 2016/17 is 2,851 pupils.

The task group identified other factors that contribute to underachievement of young people.

6.20 In Leicester the proportion of NEETs (Not in Education, Employment or Training 16-19-year olds) is falling but remains significantly higher than England. Some of the challenges that people identified in discussion with the task group were:

- Barriers to work including. a need for basic skills, lack of a bank account, email address and NI number; a need for interview skills, and basic health & safety awareness. Many young people are not confident and give up when sent forms need to be filled in.
- Work experience was popular and helped introduce young people to the world of work and build skills and confidence. Due to limited funding and resources, schools find it hard to support and encourage work experience programmes.
- The task group were aware that Leicester City Council and other employers have had success in encouraging and supporting apprenticeships and alternative pathways for disadvantaged young people and NEETs, and therefore there may be an opportunity to explore further how employers can provide guidance and support to Black Caribbean and White British working-class young people.

RECOMMENDATION 2.14

A recent Ofsted inspection in city secondary school identified positive and creative approaches to help pupils – evidence of this was heard by the task group.

“The careers advice and guidance offered to pupils within the school are impressive. The school’s concept of the ‘positive future self’ is a core value and that pupils ‘don’t always understand that they are writing their life story’ with the decisions that they make in school. The school recognises that a barrier for many of the pupils is the ability to look outside the community and to understand the many possibilities that exist. To support pupils in making well-informed choices, the school has ensured a curriculum that includes subject-specific careers advice in each year group.

“Every pupil is involved in a two-week work placement. Each pupil receives an individual interview to support them as they continue their education beyond Secondary School. The school employs a ‘futures adviser’ to work with the more challenging pupils, so they can develop the skills they need for future learning and widen their experiences. Leicestershire Cares, a local charity, provides pupils with the opportunity to refine their employability skills”.

6.21 The task group were aware of other contributing factors that can impact on the underachievement of young people e.g. vulnerable young people can be enticed into illegal activities, drugs and gangs. Young people are more likely to be disadvantaged with parents who have behavior issues, mental ill health or are in the justice system.

According to Leicester Children and Young People JSNA 2016,
www.leicester.gov.uk/JSNA :

- In Leicester one in seven 5 to 15year olds has Special Educational Needs.
- Many younger people live in deprivation, 9,3666 Leicester pupils are eligible for free school meals (2,792 in secondary education).
- There is a higher registration for mental health services in the most deprived areas of Leicester, 10% of children between 5 and 15 have a mental health disorder.
- **Childhood mental illness can lead to significant distress and poor outcomes in educational attainment and employment prospects.**
- It is estimated that between 3,220 and 6,210 young people aged 15-19 years in Leicester have a mental health condition.
- Parents with conditions affecting their behaviour or mental health can contribute to children underachieving at school.

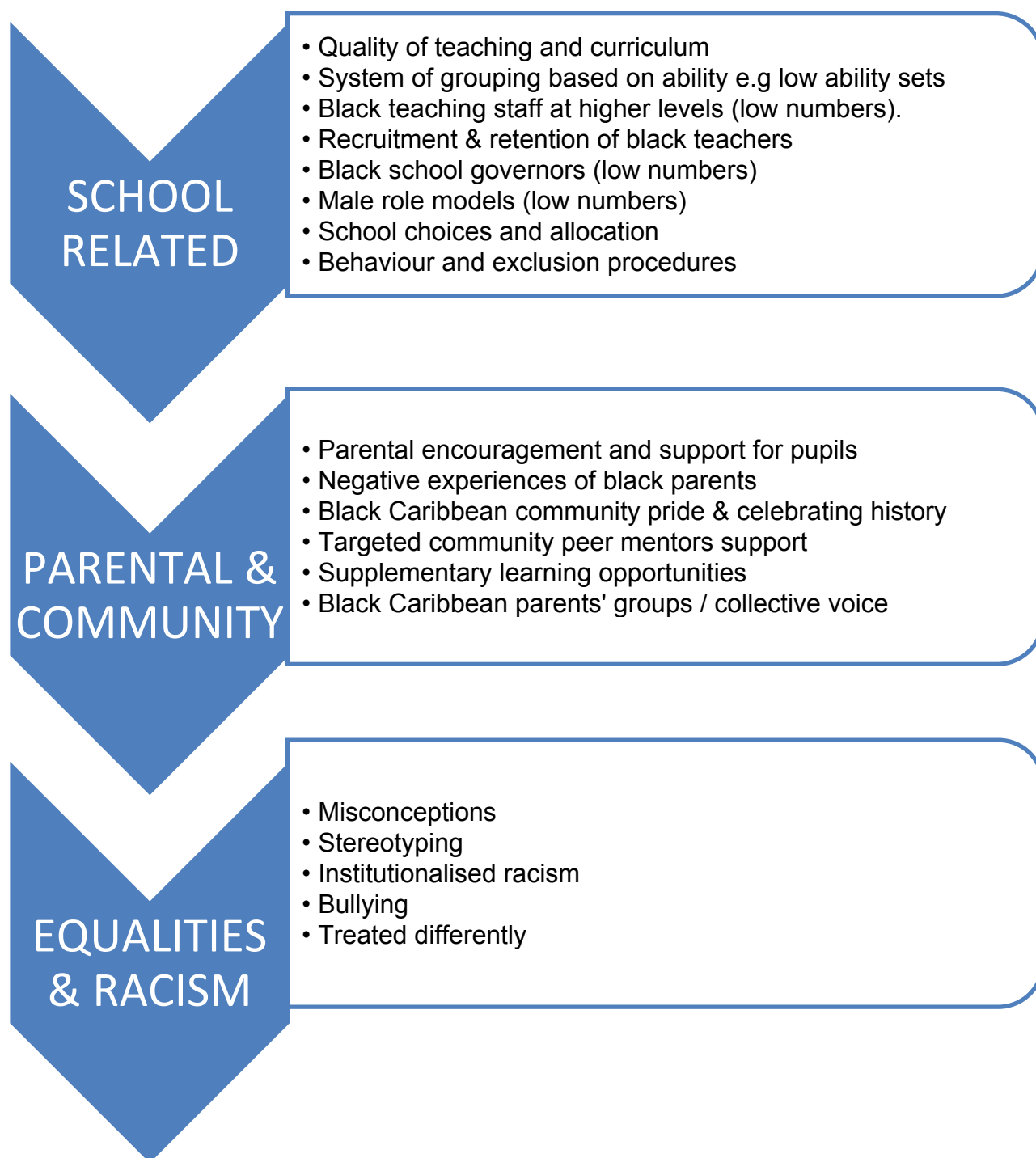
Schools identified behavioural issues; learning difficulties; mental health concerns that need to be addressed (early intervention is essential) within the education system. The task group were informed the city council Psychology Service continues to provide a free service to schools in respect of both statutory and non-statutory functions. However, if schools feel additional resource is needed this can be accessed by buying additional support. The Task Group heard from one school how the demand they have in terms of this service is far greater than the local authority free resource and therefore it does require them to buy additional resources which is an added pressure on school budgets.

- 6.22 Schools and the Council to consider key impacts of the council's Early Help strategy in supporting raising achievement for Black Caribbean and White British Working-class pupils. **RECOMMENDATION 2.8**

SECTION TWO

7. Black Caribbean pupils – challenges and contributing factors to underachievement

7.1 Table 3 – The table below summarises examples of some of the factors which may impact on Black Caribbean pupils' underachievement. The task group identified these through research reports and information gathered from individuals and schools during the review.



LOW ATTAINMENT OF BLACK CARIBBEAN PUPILS

- 7.2 Black Caribbean pupils – and boys in particular – tend to fall behind their peers as they progress through school (*Cabinet Office, 2017*). Furthermore, the gender attainment gap between Black Caribbean boys and girls is one of the largest for any BME group. This is described (*Demie 2017*) as a ‘real and persistent’ national challenge.
- 7.3 Brent Council’s recent research report, [*‘Improving Outcomes for Black Caribbean Boys’*](#) identified that Black Caribbean boys were over-represented across a range of indicators, including low educational attainment; youth offending, school exclusions, and those not in education, employment or training between the ages of 16-18 (NEETs).
- 7.4 Impact of ‘Windrush’ generation and their children:

Baroness Floella Benjamin OBE gave an inspirational talk to school children and Leicester community on the positive impact of the Windrush generation, and their offspring, in the worlds of politics, business, music and food. Lady Benjamin said that a national Windrush Day is to be commemorated each year on 22 June. ‘I think a special day would be important for schools so that children know why Caribbean people came to live here and what the Windrush generation has done for this country’.

February 2019 article by Dr Patricia Walker, professor at University of West London: ‘The Windrush descendants need our support in school – three, possibly four, generations on, their descendants should be thriving at school but sadly this is not the case. In 2018, 50% of black Caribbean pupils achieved a standard pass, compared to 69% of pupils. Among FSM pupils, 40% of black Caribbean pupils achieved a standard pass, slightly below the 46% figure for white British FSM pupils.

Nationally, Progress 8 for Black Caribbean pupils is below average (-0.1), particularly for boys (-0.5).

- 7.5 In Leicester the gap in attainment for Black Caribbean pupils has been increasing, especially from the transition from primary to secondary KS3 / KS4 upwards. This can impact on their progress through to year 11 e.g. lowering their expectations.

7.6 **Table 4 below shows Attainment of Black Caribbean pupils in Leicester secondary education is particularly low.** The attainment gap has also widened 8.7% points since 2016 to 29.9% which is the largest gap of these ethnicities.

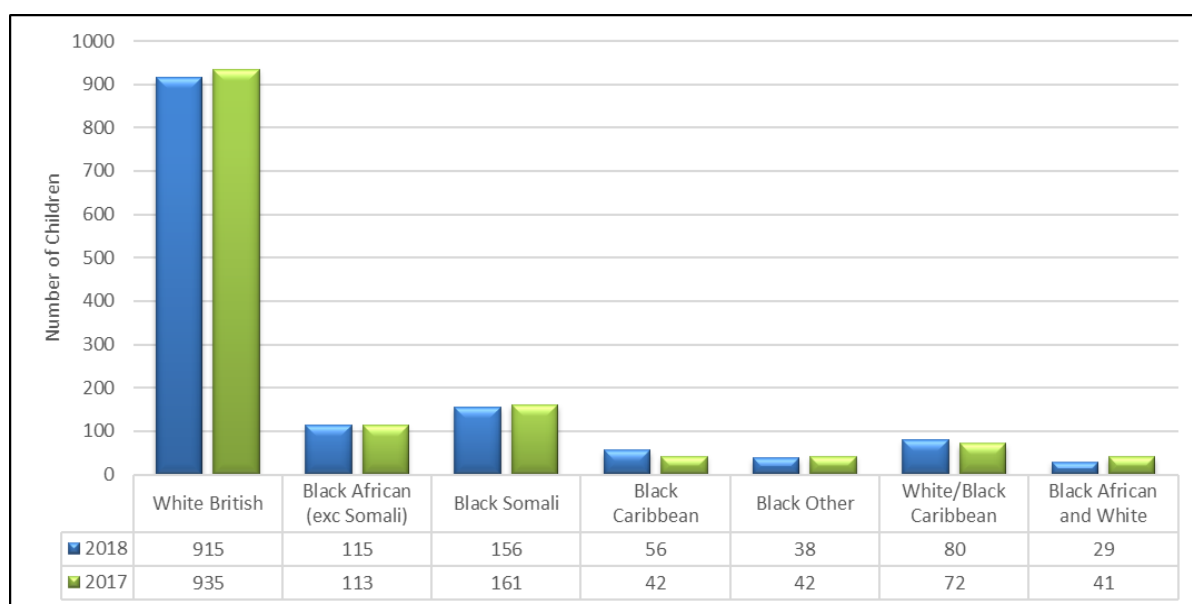
% of English & Maths Strong Pass

	White British	Black African (exc Somali for LA)	Black Somali	Black Caribbean	Black Other	White/Black Caribbean	Black African and White	All Pupils
2018: % of English & Maths Strong Pass								
Leicester City	25.6	31.3	42.3	21.4	31.6	17.5	37.9	36.3
National	42.7	44.3		26.9	33.2	31.4	41.1	43.5
Gap to National (All Pupils)	-17.9	-12.2	-1.2	-22.1	-11.9	-26.0	-5.6	-7.2
2017: % of English & Maths Strong Pass								
Leicester City	27.5	36.6	35.6	11.9	26.2	18.3	29.3	35.6
National	42.1	43.5		28.7	32.1	31.1	42.8	39.6
Gap to National (All Pupils)	-12.1	-3.0	-4.0	-27.7	-13.4	-21.3	-10.3	-4.0

Results in green highlight where attainment is better than All Pupils in Leicester.

- The attainment of White/Black Caribbean pupils in particular is low. The attainment gap to National has also widened 4.7% since 2017 to 26.0%, which is the largest gap of these reported ethnicities.
- Black Caribbean pupils attainment gap to National has narrowed by 5.6% since 2017, this is the biggest % improvement of these reported ethnicities.

7.7 **Table 5 below shows Number of Pupils at the end of Key Stage 4 in each academic year 2017 and 2018.**



- **Number of Black Caribbean students went up 33.3% from 2017**
- Number of Black African & White students went down 29.3% from 2017
- Number of White/Black Caribbean students went up 11.1% from 2017

Lambeth Council research

7.8 'The Achievement of Black Caribbean Pupils; Good Practice' by Dr Feyisa Demie, provides school case studies and methods of success factors in driving school improvement and raising attainment. This is submitted by the task group as best practice supporting evidence for schools, Leicester city council and agencies in Leicester to take forward. **RECOMMENDATION 2.1**

7.9 There is extensive research over decades which identifies the most significant factors that lead to successful outcomes for Black and African Caribbean pupils in schools include:

- Effective leadership to ensure that achievement gaps are narrowed.
- Raising aspiration and ambition for pupils at all levels
- High quality teaching, learning and assessment, and early intervention and support for pupils who are underachieving, or are at risk of underachievement.

School Choices and Allocations can hinder progress

7.10 The school that pupils attend impacts on individual performance. Good and outstanding schools in the city are oversubscribed and for some parents their preferred 1st or 2nd choice of secondary school is not always available.

An example given to the task group indicated:

'that some black Caribbean parents were experiencing difficulties when their preferred 1st/ 2nd choice of secondary schools were not available e.g. due to the high demand for high performing schools or due to catchment areas in the city. The difficulty for some parents is having to accept an alternative school offered that could be of a lower performance 'Ofsted rating' standard than would have preferred'.

7.11 The task group believes this issue could be explored further to better understand the data and trends of school choices and school allocations for Black Caribbean pupils across the city, to determine how many pupils receive their 1st, 2nd or alternative choices and what impact this may therefore have on attainment. **RECOMMENDATION 2.16**

Black Caribbean teaching staff in schools

- 7.12 The task group were informed through a review of national research reports, evidence from national teacher unions and surveys along with anecdotal evidence that there are low numbers of black BME teaching staff in British schools. The task group has referenced some examples:

“Black teachers seem to be leaving the profession at higher rates than their white counterparts, and some experience discrimination e.g. through performance management; through fair pay” – (*anecdotal evidence*)

“Black teachers are more likely to live in deprived areas and work in challenging schools with least desirable working conditions” – (*anecdotal evidence*)

- 7.13 National reports referenced in relation to the challenges faced by black (BME) teachers in British schools:

The Runnymede Trust ‘Visible & Invisible Barriers: Impact of Racism on Black Teachers’ link to report:

<https://neu.org.uk/media/2936/view>

Extract:

Overall, the BME teachers’ survey and interviews revealed that there are large differences in perceptions and career progression among BME teachers, and that more importantly, discrimination based on race is one of the more significant and deep-rooted factors that affect the experience of teaching and career progression for BME teachers. Differences in experiences in school and career progression are particularly marked for Black Caribbean and Black African teachers in comparison to other minority ethnic groups. Age, length of experience in teaching and geographical location were also important factors influencing the experience of BME teachers in primary and secondary schools.

NASUWT The Teachers’ Union re: BME Teachers in the Education System in England 2016 ‘Visible Minorities, Invisible Teachers’, link to report:

<https://www.nasuwat.org.uk/uploads/assets/uploaded/6576a736-87d3-4a21-837fd1a1ea4aa2c5.pdf>

Extract of report highlights 2016 survey results, for example:

- twice the proportion of BME teachers’ reported they had experienced discrimination in the workplace in the last 12 months.

- 75% of BME teachers have considered leaving the teaching profession, proving that the retention of teachers is a problem.

1) NUT EQUALITY CONFERENCES SECTION Sunday, 27 March 2016
IMPACT OF GOVERNMENT POLICIES ON RACE EQUALITY - MOTION 36
Conference is further concerned that the scaling back of equalities legislation and the Public Sector Equality Duty will prevent workplaces from being held to account about unfair policies and practice which are detrimental to Black teachers.

Conference notes that Black teachers continue to experience:

1. Discriminatory employment and management practices in schools, which impact on the recruitment and promotion of Black teachers and their representation in positions of leadership and influence; and
2. High levels of workplace bullying and the misuse and abuse of capability procedures which impact on performance related pay and staff retention.

Above NUT motion extract from:

NUT Annual Conference 2016 Equality Conference Section (page 57):

<http://www.teachers.org.uk/sites/default/files2014/nut-final-agenda-2016.PDF>

NUT: Black Teachers Union Conference 2015: Motion submitted:

<https://www.teachers.org.uk/sites/default/files2014/btc-2015-report-website-version.pdf>

- 7.14 Lambeth research identified that diversity of staff is needed as one way to raise achievement and case studies are provided to support this.

GOOD PRACTICE IDENTIFIED

An example of one multi-academy trust that is proactively collecting ethnicity data of all staff in their schools to map out the ethnicity of teaching staff, in order to identify gaps and take action.

- 7.15 The task group were aware that in Leicester schools all senior and leadership staff have open and equal access to all forums and decision-making groups. The task group agreed to further explore this issue to better understand the trends and journey of Black Caribbean staff in senior / higher leadership levels in Leicester schools, as this data is captured by individual schools.
RECOMMENDATION 2.6

Recruitment and Retention of Black Caribbean Teachers

- 7.16 The task group heard that more needed to be done to recruit and support new black trainee teachers. An element of competitiveness and power imbalance can exist in some schools, which impacts on the retention of black staff. The task group identified that further work was required to explore the turnover rates for newly qualified Black Caribbean staff and trainees and exit interviews. **RECOMMENDATION 2.17**
- 7.17 The task group suggested that De Montfort University and Leicester University be approached to explore possible programmes and support they could offer to Black Caribbean trainees. **RECOMMENDATION 2.21**

Black Caribbean male role models

- 7.18 The visibility and guidance of black Caribbean male role models and mentors within school settings is essential for black pupils to build confidence and pride in themselves.

Task group heard evidence from youth workers who explained that multiple factors could impact on Black Caribbean boys, making them more susceptible to becoming involved in crime. These include the influence of poverty, lack of male role models and disengagement with education.

The above factors and the impact of having a criminal record can severely curtail future employment prospects (Stacey, 2018).

Parental and family support for Black Caribbean pupils to be encouraged

- 7.19 Education does not begin and end in the classroom. The learning process stretches way beyond the school gates, and children whose parents encourage them, help with homework and get involved with school events are the most likely to excel.
- 7.20 The task group heard that in some cases parents can feel disengaged from their children's education if they themselves had negative experiences of school and this can result in poor engagement or refusal to engage with schools and teachers.
- 7.21 However, it is important to note that sometimes families' aspirations are not 'low' but different to those traditionally supported by schools. *Professor of Critical Race studies at the University of Birmingham emphasised that pupils from black backgrounds "tend to have higher than average aspirations – and are very motivated to achieve in school" 2018.*

Lambeth research (page 165) shows:

The high achievement of the black Caribbean pupils has been achieved due to a level of trust that has been established between staff and parents, often this is because parents see the diversity of staff employed by the school and they feel confident that their children will not only be treated fairly but that they will have positive role models to aspire to.

- 7.22 Schools have an important role to build strong, constructive relationships with parents and families and involve them in their children's raising achievement journey. [ParentKind](#) **RECOMMENDATION 2.4**

School Governing Bodies – to encourage more Black Caribbean parents to engage with school governance

- 7.23 When parents are involved with their children’s schools, they can become much better informed about and involved in their children’s education and progress. The task group recognised that engaging more black Caribbean school governors is an essential part of closing the gap which can exist between schools and Black Caribbean parents.
- 7.24 Leicester City Council does not hold ethnicity data on city school governors. The schools and their governing bodies are responsible for recruiting them. However, the LA provides support and guidance via ‘on-line centre’. The council also encourages schools to register governor vacancies with national and local recruitment organisations such as ‘Governors for Schools’ and ‘Inspiring Governance’.

*“Schools should be actively encouraged to have a diverse mix of school governors from all backgrounds. Black governors are the missing link between parents, community and schools to breaking down barriers and to support Black Caribbean pupil performance and wider issues”.
Schools in the city need to do more to raise awareness amongst Black Caribbean parents and the community to actively recruit them to the role of school governor. **RECOMMENDATION 2.5***

To encourage community pride and support for black Caribbean history and culture

- 7.25 There are now 2nd and 3rd and possibly 4th generations of the Black Caribbean community in the city. Leicester prides itself on the diverse range of celebratory events held in the city such as ‘Black History Month’ and the ‘Caribbean Carnival’. Additional programmes and events and awareness-raising of Black Caribbean history and culture (in ‘positive images’ and stories) would broaden the knowledge of the younger generation. There were suggestions made around the possible need for a more balanced curriculum in schools to provide students with a better reference point and knowledge of black history whilst recognising that the curriculum is very much defined by the Department for Education. The Task Group suggest that schools and communities in partnership with the council explore new approaches to reconnect pride and celebration with Black Caribbean history and culture. **RECOMMENDATION 2.20**

- 7.26 The task group heard there was a lack of Black Caribbean community support / networks for young Black Caribbean's within Leicester. The task group identified that further work was required to explore what is available within the black community network e.g. black churches, community groups such as WISP, and what additional support and guidance can be offered e.g. through mentoring and education support. The task group suggested that a 'mapping exercise' in partnership with the community be explored by the Council although this would require appropriate resources to be identified. **RECOMMENDATION 2.15**

GOOD PRACTICE IDENTIFIED

Task group were informed of youth activities provided by black churches which has helped young people to have positive outcomes and identity to their culture; helped with pastoral and education support and with peer mentor guidance. This positive approach needs to be replicated and enhanced within the black voluntary and community sector network. **RECOMMENDATION 2.15**

- 7.27 Leicester City Council performance data shows that other communities e.g. Black Somali community and Indian communities perform better than Black Caribbean pupils. Many communities have created learning support provisions within their own community. The task group suggested that new approaches be explored in partnership with the Black Caribbean community to encourage parents to boost their children's learning e.g. supplementary learning opportunities. **RECOMMENDATION 2.18**

GOOD PRACTICE IDENTIFIED

The ethos of the Somalia parents who have settled in Leicester have created their own learning opportunities for their children's needs, for example up to 80 students attend community education provision most Saturdays in the St. Matthews area of the city.

Misconception and Stereotyping

- 7.28 Misconceptions and stereotyping are common in society and mean black pupils may be labelled as trouble makers or treated differently to non-black pupils (this can be a bigger issue for black boys at secondary school as they can feel they receive harsher punishments when incidents have taken place).

Bullying

- 7.29 Bullying can occur in school and schools have anti-bullying policies. Bullying can occur on the grounds of race and contribute to black pupils feeling demoralised and marginalised. **The task group were informed that the city council supports schools to address bullying in schools and have developed a [new charter on 'Peaceful Places' to support this work.](#)**

Good Practice identified: An example of a secondary school in the city giving priority to tackle concerns about bullying:

Leaders took quick action by introducing a new system for referring and monitoring these concerns. Staff have worked actively to improve anti-bullying strategies. An anti-bullying leader has been appointed and has led developments in all areas of the school. A team of 15 pupils has been appointed as anti-bullying ambassadors to support staff in promoting the anti-bullying message and supporting other pupils where potential concerns may arise.

The emphasis is on prevention and support and there is a clear understanding, throughout the school that bullying will not be tolerated. Pupils said they felt safe in school and that bullying was now rare. They reported that when incidents did occur staff dealt with them quickly and effectively. Pupils said the school was friendly and welcoming. Older pupils recognised the improvements that had been made. Although the picture was now positive leaders were not complacent and were keen to maintain focus on this important aspect of the school's work.

Institutional racism

- 7.30 All teachers and schools are expected to have high expectations of all students. In society institutional racism does exist (consciously or unconsciously) and this can contribute to black pupils being treated differently.

Good practice and raising achievement
Research in 2018 analysed underachievement of black Caribbean children, suggesting ways of combatting it such as:

- *Enhancing pupils' mental health,*
- *Working and better engaging with parents*
- *Access to high-quality early years provision*
- *Raising teachers' expectations*
- *Recruiting a diverse workforce in schools e.g. more black teachers*
- *Encouraging peer support*
- *Organise supplementary schools*
- *Wider sharing and positive enrichment of black history and contribution of black people in society.*

Source: [LKMco, an education and youth development 'think and action tank'](#)

- 7.31 The task group recognised schools are striving to address issues of underachievement for all pupils, however it felt that more swift action needed to be taken to raise the achievement for Black Caribbean pupils. The task group believe that the good practice within higher-performing secondary schools in the city should be identified by education services improvement leaders and be shared to support and mentor lower performing secondary schools in the city. The Children, Young People and Schools Scrutiny Commission would welcome a detailed report setting out the work being done and future proposals. **RECOMMENDATION 2.12**

SECTION THREE

8. White British Working-Class pupils – challenges and contributing factors to underachievement

"In parts of Leicester the white working-class culture is characterised by low aspirations and negative attitudes towards education" Source: Leicester City Council evidence to House of Commons Select Committee inquiry 2014.

Background

- 8.1 For many years the educational underachievement of White British working-class pupils has been a national and local concern, with the attainment gap widening as children move from primary through secondary school.
- 8.2 In 2014, Leicester City Council submitted written evidence to a *House of Commons Select Committee inquiry into 'Underachievement in Education by White Working-Class Children'*. This enquiry identified white working-class students as the lowest-performing in their peer group.
- 8.3 Leicester City Council's evidence in 2014 identified these key issues:
- a) Leicester City faces many social challenges which effect the life chances of pupils locally
 - b) Gaps in attainment for White British pupils begin to develop as early as Key Stage 1.
 - c) These gaps often widen through the subsequent key stages up to age 16 and beyond.
 - d) There is low achievement amongst white working-class boys in Leicester.
 - e) Family-related issues play a key part in determining attainment outcomes for white working-class pupils.

Current position

- 8.4 In 2019, five years after the above review, evidence showed:

'the difference in progress of White British disadvantaged pupils compared with other pupils nationally remains wide. More work is still required to ensure that the proportion of disadvantaged pupils who reach the required standard by the end of key stage 4 increases further.'

Ofsted inspection report city secondary school.

8.5 Appendix A charts performance data for KS4 and shows:

- a) The low achievement of White British working-class pupils in Leicester still exists.
- b) The Attainment 8 Score of White British pupils is low compared to all pupils and nationally. The gap to national has widened 3.2% since 2017 to 11.5% and it is the 2nd largest gap of these reported ethnicities.
- c) The Progress 8 Score of White British pupils is low compared to all pupils and nationally. The gap to national has widened by 0.25 to 2017 to -0.72.
- d) Data indicates significantly worse attainment at GSCE than the national average.

8.6 Task group members believe there is a lack of awareness by members and parents of school league tables and the measures used to show performance and trends. Parents should be helped to understand how to interpret school performance measures, as this would encourage them to support their children, and assist them with school selection choices.

RECOMMENDATION 2.3

For example, there has been some criticism from some head teachers who claim that:

"The way secondary school league tables in England are devised is unfairly stigmatising schools in white working-class areas". One measure used for comparing schools known as 'Progress 8' has been criticised as being unfair and skewed against schools serving deprived white communities."

What are the challenges White Working-Class (fsm) pupils face?

8.7 Many factors contribute to the educational underachievement of White Working-Class pupils. These are wide ranging and complex, with some relating to the home environment while others are connected to in-school practices and wider social issues and engagement within the community.

8.8 Table 6 demonstrates the challenges that are likely to contribute to the Underachievement of White British Working-Class Pupils.

Table 6 is a summary of examples of one or more factors that are likely to impact on White Working-class pupils underachieving. The task group identified these through research reports and information gathered during the review

Poverty and Social Class identified as deeper-rooted problems

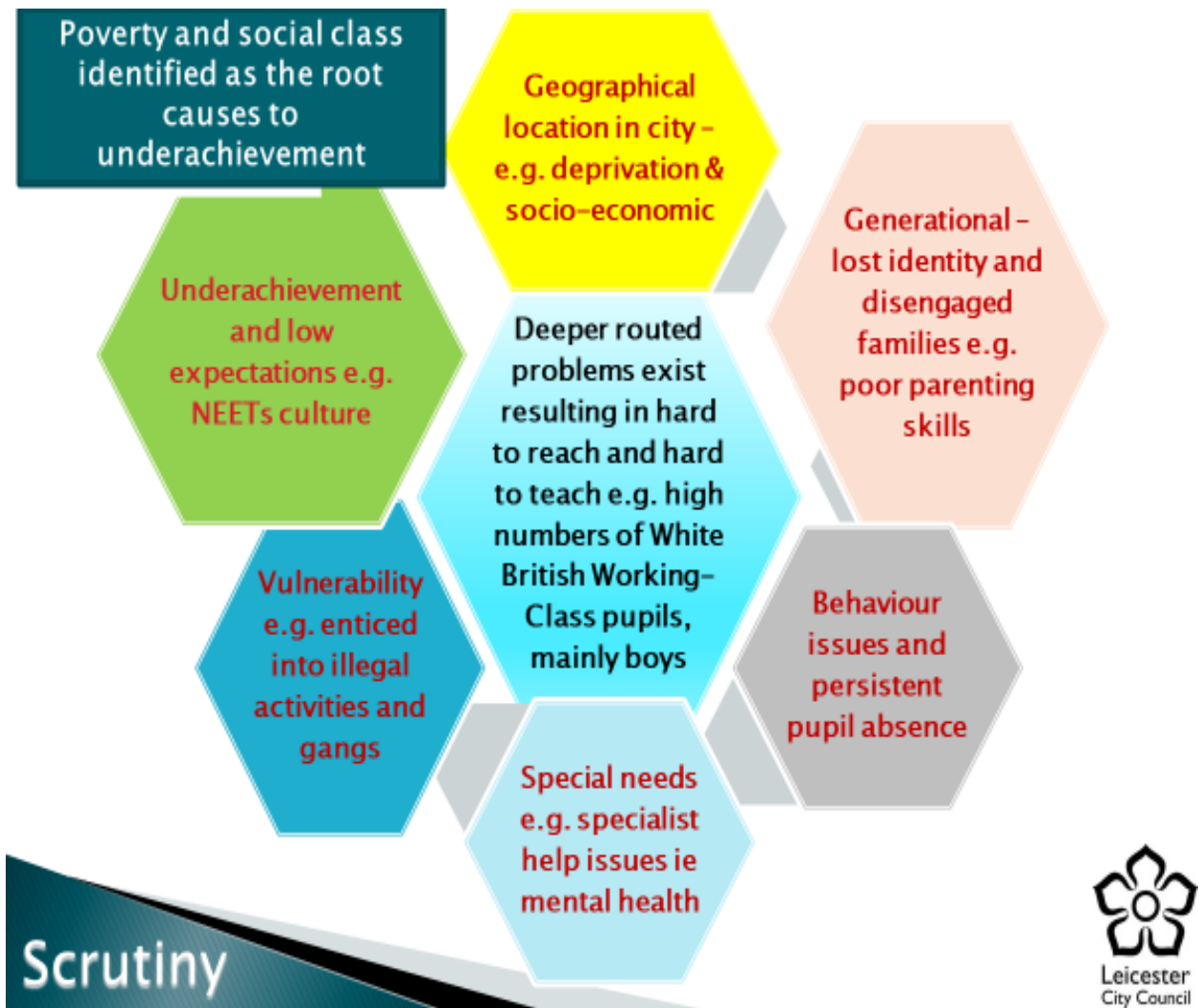


Table 6

Poverty and social class can contribute to other issues facing some parents in the city e.g. low income, low morale and struggling daily to provide the basics such as food, housing etc.

8.9 According to 2017 research by the 'End Child Poverty Coalition' more than 34,000 children are growing up in poverty in Leicester. The research found

that in Leicester West 10,290 youngsters (37.4%) are living under the government's defined poverty level.

8.10 According to research by Lambeth Council: '*Raising the Achievement of White Working-Class Pupils – Barriers and School Strategies*' (by Feyisa Demie and Kirstin Lewis): -

'Social Class, poverty and attainment are issues that research has highlighted as a central concern (the identification of White Working-Class pupils underachievement is complicated by the lack of identification of white working-class pupils within national data). Broadly, white working-class pupils are found within the wider definition of White British. However, due to a lack of widely available data on white working class, a number of studies focussed on students 'who can be reasonably described as White British and who come from economically poorer families who tend to do less well than any other groups'. The free school meals variable is often used as a proxy measure for the extent of social deprivation in pupils' backgrounds and has been linked to underachievement in a number of studies.

8.11 Recent DfE data confirms the relative low attainment of pupils who are entitled to free meals. Only 32% of White British FSM pupils achieve the threshold of 5 or more GCSEs including English and Maths'.

8.12 Recent research by *The Sutton Trust* identified that there was nothing more important for promoting social mobility in schools than access to the best teaching. Great teachers in top performing schools have the most positive impact on the disadvantaged pupils who need it most. But too often those from less well-off homes (and working-class parents) do not have access to best schools and the best teachers. Who gets into highly successful schools matters, because these students are more likely to go to a top university and get into jobs in the most sought-after professions.

8.13 Location (geography and deprivation) of where pupils' live impacts on their upbringing, lifestyle and attitudes to school. We know White British working-class pupils in Leicester have been underachieving for many years. Specific areas of the city e.g. New Parks, Braunstone and Beaumont Leys - have a higher proportion of young people from disadvantaged white working-class backgrounds and are recognisable for issues relating to low attainment and special needs from primary age level upwards.

➤ Evidence: Leicester Children and Young People's Health and Wellbeing Survey 2016 identified: *White British, most deprived, free school meals and poor wellbeing are significantly more likely to report their area as not a good place to live (analysis by demographic group, deprivation and*

geography has highlighted areas most deprived living in the North West, South and West of the city).

- Evidence: Examples of consistently higher-achieving secondary schools are Rushey Mead and Soar Valley which have a higher proportion of students of Asian background (evidence shows many of these pupils have positive family support networks and supplementary learning from an early age).

Generational issues for White British Working-Class families

In some parts of Leicester's deprived areas e.g. Braunstone and New Parks, families in poverty have resided in one place / area of the city for many years or all their lives and some can become disengaged. The task group heard examples of some of the complex and deep-rooted issues that can make it more challenging to help families and young people:

- Lack of aspiration or the ethos to do well. In some cases, this pattern of low aspiration and low attainment follows in the footsteps of their parents
- Complex issues in the day to day lives of families such as drug use, poor quality of housing, and poverty. These issues can impact on children as they may not have the social skills to understand the competitiveness of what goes on in schools / school environment and classroom environment.
- Disadvantaged and disengaged families that have either lost their way or feel forgotten by society (this combination of poverty and 'lost identity' combined with no work prospects allows far right-wing groups to prey on poor communities).

"We seem to have lost those years when the white working-class community was seen as vibrant and ambitious e.g. fashion, rock & roll bands and large slices of mainstream culture were shaped by their tastes' – the long lineage of English pop bands such as the Kinks, the Jam, the Clash and the Smiths drew upon the energy of white working-class culture". (Evidence to the task group).

- 8.14 The Task Group suggest that schools and white working-class communities in partnership with the council explore new approaches to reconnect, revive and raise awareness through learning and celebration events.

RECOMMENDATION 2.20

8.15 Behaviour issues and persistent pupil absence are contributing factors to the underachievement of White British working-class pupils.

Task group evidence included:

- Lack of respect and discipline in school / classroom environment impacts on schools:
- Behaviour issues affect performance and learning and is disruptive to other students.
- Teachers feel under pressure and stressed with class sizes too big and a lack of respect from some pupils.

Persistent Absence

8.16 Schools praised the council's Education Welfare Service. Some schools felt they needed extra help where numbers of persistent pupil absences are increasing – as there are strong links between attendance and attainment.

The task group heard that most school non-attendance relates to white working-class disadvantaged pupils in city schools (some are unable to and some are unwilling to attend). Some schools reported that it was particularly difficult to halt the habit of low attendance or persistent absence from primary to secondary school level. Key concerns raised with the task group included:

- Low attendance / persistent absence of a pupil is likely to impact on siblings from the same family;
- Becomes more prominent at KS4 (as per national data);
- An increase in anxiety-related (and mental health) conditions likely to warrant CAMHs intervention;
- Penalty notices / attendance panels are a deterrent (but schools referenced that some parents ignore these). Some schools want more severe (or effective) penalties.
- Some schools struggle to support parents due to cuts in targeted youth support and early help.

The task group identified that good parenting skills are building blocks to helping disadvantaged families in the city and suggest exploration of new approaches to support parents who feel isolated and disengaged with schools for example as shown in the Lambeth research case studies.

RECOMMENDATION 2.19

The task group were aware of the Education Welfare Service working with schools and providing excellent guidance. The task group agreed that a city-wide information campaign which would raise the profile about the link between good attendance, grades and prospects / careers (the importance of attending school regularly needs to be reinforced and publicised) should be considered. **RECOMMENDATION 2.11**

Exclusions

8.17 This can be an issue at secondary school level although there have been very few exclusions in the city. Main findings were that:

- All schools required to have Behaviour policy / codes and Absence policies.
- Boys are more likely to be excluded
- Non-attendance at school was either by choice or because of illness or exclusion – and impacts on learning, attainment and schools' performance.
- Schools are reluctant to exclude pupils except in exceptional circumstances and once all other available options have been exhausted.

8.18 It was recognised that the home environment can contribute to pupil behaviour and underachievement. Children and young people are likely to benefit from rules and routine, and these need to remain consistent in and out of the home.

Family Relationships

8.19 Public Health England identified (2014) *'that children and young people who perceive that they have good communication and are bonded with an adult are less likely to engage in risky behaviours. Parents who provide supervision, nurturing and involved with their adolescents' activities and learning are promoting a safe environment in which to explore opportunities'*.

8.20 The task group recommends that schools in Leicester consider the Lambeth research school case studies as good practice in raising aspirations and achievement of White Working-Class pupils. **RECOMMENDATION 2.1**

8.21 The task group also wish to highlight these key features and successes to raising achievement of White Working-Class pupils as identified in the Lambeth research report *'Raising the Achievement of White Working-Class Pupils – Barriers and School Strategies'* (by Feyisa Demie and Kirstin Lewis):

- Strong and inspirational leadership by the headteacher
- High expectations for all pupils
- An inclusive curriculum that raises aspiration and meets the needs of White working class
- Close links with parents and increasing community support
School case study examples that helped to engage parents a) numeracy and literacy workshop to make games that they take home to play with their parents, b) family learning projects for White working-class parents which are not necessarily curriculum based.
- Effective use of data and rigorous monitoring systems
In the case study schools, the *'use of data for school improvement'* was a strength. One of the core elements of school success in raising achievement is a robust focus on tracking and monitoring individual pupil progress and achievement. Pupils who are not on track with their learning

are highlighted and interventions put in place, e.g. booster classes, pupil groupings, additional support including one to one.

- Good and well targeted support for White Working-Class pupils
- Effective support for language development
- Good support for the transition between primary and secondary
- Celebration of cultural diversity and a strong commitment to equal opportunities.

8.22 In 2014, Sir Michael Wilshaw attributed the underachievement of poor white children to a "poverty of expectation", and in particular the low expectations of others: *"Poverty of expectation bears harder on educational achievement than material poverty, hard though that can be. And these expectations start at home. Children from disadvantaged backgrounds very often have high ambitions, especially when they're young. But the odds against achieving them can worsen with age. All too often there comes a point at which expectations shrink. They don't see their elder siblings or friends going to university, so they think it's not for them. Or no-one in their household is in paid work, so they don't expect to get a job. But where the family is supportive and demanding then in my experience the child is much more likely to succeed ... the job of schools is made so much easier, or so much harder, by the expectations that families have for their children. **So as a society we have to create a culture of much higher expectations for young people, both in our homes and in our schools***

8.23 Members of the task group endorsed this statement and recommended that "as a city we need to create a culture of much higher expectations for young people in all our schools, in our society and community, and in partnership with parents". The task group felt that joint working locally and nationally was a positive approach that could be considered e.g. knowledge exchange / toolkit approach.

9. Financial, Legal and Other Implications

Financial Implications

None identified

Martin Judson, Head of Finance, Leicester City Council

Legal Implications

There does not appear to be any legal implications (from an education perspective).

Suraiya Ziaullah, Solicitor, Leicester City Council

Climate Change Implications

None identified.

Equality Implications

Under the Equality Act 2010, public authorities have a Public Sector Equality Duty (PSED) which means that they have a statutory duty to pay due regard to the need to eliminate unlawful discrimination, harassment and victimisation and any other conduct prohibited by the Act, to advance equality of opportunity between people who share a protected characteristic and those who don't and to foster good relations between people who share a protected characteristic and those who don't. This on-going duty is not only relevant to the work of local authorities, but to schools and public sector organisations such as the NHS.

Protected Characteristics under the Equality Act 2010 are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

The report details a scrutiny inquiry into the underachievement of White Working-Class and African Caribbean pupils in secondary education. The underachievement of these groups would indicate that there is not currently equality of opportunity in education (caused by a number of different factors) which impacts furthermore on the opportunities that those pupils will have access to in the future. As the report focuses on the ethnicity of those pupils, race is certainly a relevant protected characteristic, however the report also looks at how different identities such as gender, disability (in particular mental ill health) and socioeconomic status can interact with race to cause additional disadvantage. In addition, those pupils who are underachieving may also have other protected characteristics and any further work arising from the recommendations consider this.

Whilst the primary focus of the report is pupils, there are also potential implications arising from the report recommendations for teachers, school staff and governors. Some potential issues in terms of the recruitment and retention of black teachers have been outlined within the report. This will benefit from further exploration, in order that actions can be identified which advance equality of opportunity for not only teaching staff but also pupils for the reasons outlined within the report. Positive action is permissible under the Equality Act 2010, and, therefore, once the appropriate data has been identified and analysed there are likely to be ways in which under representation and low retention may be addressed.

However, there is a distinction between positive action which is lawful and positive discrimination which is not, which any further work in this area will

need to take into consideration. The positive action provisions of the Equality Act can also be applied to measures taken to advance equality of opportunity for pupils, where there is evidence of specific barriers. Positive action provisions under the Equality Act 2010 allow schools to target measures that are designed to alleviate disadvantages experienced by, or to meet the particular needs of, pupils with particular protected characteristics. Such measures will need to be a proportionate way of achieving the relevant aim. The provisions would also apply to any further actions taken to improve job prospects for white working-class people who are not in employment, training or education provided they are implemented in line with the requirements of the Equality Act 2010.

Overall, the recommendations outlined within the report are likely to have positive equalities impacts in terms of the achievement and attainment of White working class and African Caribbean pupils. However, in the event that the recommendations are taken forward equalities will need to be a key consideration of further work.

The equalities team can offer specialist support and advice at the appropriate point where required, particularly where any further work arising from the recommendations is likely to require an Equality Impact Assessment.

Hannah Watkins, Equalities Manager ext. 37 5811

10. Appendix

Appendix A - Key Stage 4 Attainment by Ethnicity – Summer 2018

11. Acknowledgements

With thanks and acknowledgement to those who provided evidence to this review. Thanks to Lambeth Council and research lead author Dr Feyisa Demie for giving permission to us to use the research reports.

12. Officer to Contact

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Overview Select Committee
Draft Work Programme 2019 – 2020

Meeting Date	Topic	Actions Arising	Progress
20 Jun 19	1) Tracking of petitions 2) Implementing the City Mayor’s Manifesto Update 3) Questions to City Mayor 4) Revenue Budget Monitoring Outturn 2018/19 5) Capital Budget Monitoring Outturn 2018/19 6) Income Collection April 2018 - March 2019 7) Review of Treasury Management Activities 2018/19 8) Statutory Guidance on Overview and Scrutiny in Local and Combined Authorities 9) Scrutiny Work Plan 2019-20	4) A number of queries related to the finance reports to be answered via email. 8) A report on the implications of this report to come back to scrutiny. 9) Smart City Strategy to be added to OSC agenda.	4) Emails being actioned 8) Added to Nov 9) Added to Jan
19 Sep 19	1) Tracking of petitions 2) Questions to City Mayor 3) Revenue Budget Monitoring P3 4) Capital Monitoring Report P3 5) Equality Strategy and Action Plan – Update 6) Scrutiny Commission’s Work Programmes: <ul style="list-style-type: none"> • NS Task Group Scoping Document 		
28 Nov 19	1) Tracking of petitions 2) Questions to City Mayor 3) Draft Local Plan – Pre-Consultation Update 4) Revenue Budget Monitoring Period 6 5) Capital Monitoring Report Period 6 6) Income Collection Performance 7) Treasury Performance 8) Scrutiny Commission’s Work Programmes: <ul style="list-style-type: none"> • EDTT Task Group Scoping Document • ASC Task Group Scoping Document • CYPS Scrutiny Review Report 		

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Appendix I

Meeting Date	Topic	Actions Arising	Progress
12 Feb 20	1) Tracking of petitions 2) Questions to City Mayor 3) Draft General Fund Revenue Budget 2020/21 4) Workforce Profile 5) Smart Cities Report 6) LCC's Position on Statutory Guidance on Overview and Scrutiny in Local and Combined Authorities 7) Draft Scrutiny Annual Report 2018/19		
5 Mar 20	1) Tracking of petitions 2) Questions to City Mayor 3) Local Plan Consultation 4) Treasury Strategy 2019/20 5) Investment Strategy 6) Revenue Budget Monitoring P9 7) Capital Monitoring Report P9		
30 Apr 20	1) Tracking of petitions 2) Questions to City Mayor		

Forward Plan Items

Topic	Detail	Proposed Date
Workforce initiatives relating to the Equality Strategy and Action Plan	Follow-on work from the September ESAP report	November 2019/January 2020
Digital Transformation		
Health and Wellbeing Strategy		
Prevent Strategy		
Homelessness Strategy		
Emergency Planning		
Revenue Budget Monitoring Outturn 2019/20		June 2020
Capital Budget Monitoring Outturn 2019/20		June 2020
Income Collection April 2019 - March 2020		June 2020
Review of Treasury Management Activities 2019/20		June 2020

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