

EXECUTIVE

Date:	Wednesday 3rd December, 2025
Time:	5.00 pm
Venue:	Mandela Room

AGENDA

1. Welcome and Fire Evacuation Procedure

In the event the fire alarm sounds attendees will be advised to evacuate the building via the nearest fire exit and assemble at the Bottle of Notes opposite MIMA.

2. Apologies for Absence

To receive apologies for absence.

3. Declarations of Interest

To receive any declaration of interests.

4. Minutes - Executive - 8 October 2025

5 - 16

To receive the minutes of the previous meeting.

5. Minutes - Executive Sub-Committee for Property - 19 November 2025

17 - 18

To receive the minutes of the previous meeting of the Executive Sub Committee for Property.

6. Announcements from the Mayor

To receive any announcements from the Mayor.

7. Questions from Members of the Public (if any)

To receive questions from members of the public.

8. Questions from elected Members (if any)

To receive questions from elected Members.

9. Matters referred from Scrutiny or Council (if any)

To consider reports of Overview and Scrutiny Board following the Call-In process or Council following the Budget setting process.

OVERVIEW AND SCRUTINY BOARD

To consider any final reports from Scrutiny Panels.

10. Final Report of the Place Scrutiny Panel - Empty Properties 19 - 34

*Executive report for decision.
Scrutiny report to note.*

THE MAYOR

11. Corporate Performance Quarter Two 2025/2026 35 - 72

Report for decision.

12. Council Plan 2026/27-29: Outcomes Refresh 73 - 88

Report for decision.

DEPUTY MAYOR AND EXECUTIVE MEMBER - EDUCATION AND CULTURE

13. SHiFT Programme Progress Update 89 - 94

Report to note.

EXECUTIVE MEMBER - ADULT SOCIAL CARE

14. Domestic Abuse Strategy 2025-2028 95 - 134

Report for decision.

EXECUTIVE MEMBER - FINANCE

15. Revenue and Capital Budget - Forecast Year-end Outturn position at Quarter Two 2025/26 135 - 184

Report for decision.

16. Calculation of Council Tax Base for 2026/27 185 - 196

Report for decision.

17. Treasury Management Mid-Year Review - 2025/26 197 - 212

Report to note.

EXECUTIVE MEMBER - DEVELOPMENT

18. Cemetery Provision - Middlesbrough 213 - 228

Report for decision.

19. Any other urgent items which in the opinion of the Chair, may be considered.

Charlotte Benjamin
Director of Legal and Governance Services

Town Hall
Middlesbrough
Tuesday 25 November 2025

MEMBERSHIP

Mayor C Cooke (Chair) and Councillor I Blades, T Furness, P Gavigan, L Henman, J Rostron, J Ryles, P Storey and N Walker

Assistance in accessing information

Should you have any queries on accessing the Agenda and associated information please contact Scott Bonner, 01642 729708, scott_bonner@middlesbrough.gov.uk

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EXECUTIVE

A meeting of the Executive was held on Wednesday 12 November 2025.

PRESENT: Mayor C Cooke (Chair) and Councillors I Blades, T Furness, P Gavigan, L Henman, J Rostron, J Ryles and N Walker

ALSO IN ATTENDANCE: D. Hodgson (Local Democracy Reporting Service).

OFFICERS: S Bonner, C Benjamin, M Brown, G Field, L Grabham, R Horniman, A Humble and E Scollay

APOLOGIES FOR ABSENCE: Councillors P Storey

25/38 WELCOME AND FIRE EVACUATION PROCEDURE

The Chair welcomed all those present to the meeting and advised attendees of the fire evacuation procedure.

25/39 DECLARATIONS OF INTEREST

Name of Member	Type of Interest	Item/Nature of Interest
Mayor C Cooke	Non-Pecuniary	Item 14 – Tees Valley Investment Zone Memorandum of Understanding – Member of the MDC

25/40 MINUTES - EXECUTIVE - 8 OCTOBER 2025

The minutes of the Executive meeting held on 8 October 2025 were submitted and approved as a correct record.

25/41 ANNOUNCEMENTS FROM THE MAYOR

The Mayor expressed his sadness that former Councillor Morgan McClintock had stood down, stating his views were always welcomed and that he brought useful and insightful comments to Council meetings.

25/42 QUESTIONS FROM MEMBERS OF THE PUBLIC (IF ANY)

A question had been received from a Member of the public which the Mayor read out:

The problems affecting TS1 mirror that of North Ormesby, with the addition of regular street parties held and the Anti Social Behaviour issues this brings. Can North Ormesby be considered for a PSPO? If not please explain why not.

The Mayor invited the Executive Member for Neighbourhoods to respond. The Executive Member stated the Council was assessing where and when Public Space Protection Orders could be implemented in Middlesbrough and North Ormesby was being considered as part of that process. The Council and partners had a range of tools and powers that could be used to address Anti-Social Behaviour, and residents were advised to report any incident of crime and ASB to the relevant agencies e.g. the police or neighbourhood wardens.

The Mayor added that there had been a change in legislation regarding alley gates. As such the Council was exploring ways to gate alleyways which may assist with Anti-Social behaviour.

NOTED.

25/43 **QUESTIONS FROM ELECTED MEMBERS (IF ANY)**

None.

25/44 **MATTERS REFERRED TO EXECUTIVE FOR RECONSIDERATION FROM SCRUTINY OR COUNCIL (IF ANY)**

None.

25/45 **REPORTS FROM THE OVERVIEW AND SCRUTINY BOARD OR A SCRUTINY PANEL**

None.

25/46 **DELIVERY AGAINST THE CONTINUOUS IMPROVEMENT PLAN - PROGRESS UPDATE**

The Mayor submitted a report for Executive's consideration. The purpose of the report was to set out progress in delivering the Continuous Improvement Plan to ensure the Council could articulate its ongoing commitment to continuous improvement and capture activity that had been undertaken to deliver that commitment.

In March 2025, Council considered the final reports of both the Local Government Association (LGA) Corporate Peer Challenge team and the Middlesbrough Independent Improvement Advisory Board (MIAB).

Both of those reports were hugely positive, recognising the improvements the Council had made over the previous two years on its improvement journey. They also contained a series of recommendations, designed to ensure the Council maintained an outcome focussed commitment to the principles of its continuous improvement journey as it transitioned from a period of intervention.

The plan also continued to track delivery of actions arising from the External Assurance review undertaken by Grant Thornton as part of the Exceptional Financial Support (EFS) application. It also included an actions arising from the Care Quality Commission inspection of Adult Social Care services.

A copy of the Continuous Improvement Plan and its status as of October 2025 was appended to the report. The Plan continued to evolve as actions were delivered and follow up actions were identified where necessary.

There were 49 actions within the plan. In June 2025 it was reported that 16 had been completed. Since that time a further six had been completed, bringing the total number of completed actions to date to 22. Two new follow up actions had been added since the Plan was last reported. The first new action would track the launch of arrangements to bring in external expertise to manage the Council's commercial property portfolio, following completion of market testing. The second new action built on completion of recruitment of additional capacity to support Members submitting Councillor Gateway inquiries. It would track delivery of an improvement plan to strengthen the system and respond to feedback from Councillors who were using it.

The Mayor stated that the Council was working hard to implement the actions contained in the Plan as part of the improvement journey. Thanks were expressed to all those involved in the Council's improvement journey.

OPTIONS

The Council could choose to maintain multiple documents capturing continuous improvement activity. However, this would have been an inefficient approach and would have reduced Members ability to see a comprehensive overview of the Council's ongoing activity in relation to continuous improvement.

ORDERED that Executive approve the updated Continuous Improvement Plan.

AGREED that Executive note the progress made in delivering the commitments within the continuous Improvement Plan.

REASONS

Having a Continuous Improvement Plan that captured all strategic continuous improvement activity provided Members and Officers with a comprehensive overview of improvement activity within the organisation as part of a framework of assurance reports. The plan ensured the Council was tracking this type of activity within one document. Successful delivery of continual improvement activity would improve the Council's ability to deliver against its Council Plan ambitions.

25/47

REPROVISION OF LEVICK COURT

The Executive Member for Adult Social Care submitted a report for Executive's consideration. The purpose of the report sought Executive approval to reprofile Levick Court that would ensure that a high-quality respite/short breaks service would be provided for residents and would ensure sustainability within the workplace.

In 2010, discussions began with the Tees, Esk and Wear Valley Mental Health Trust (TEWV) and the Levick Trust regarding the relocation of existing respite services from the Council's provision at 4 St. Paul's Road and TEWV's Bankfields Court, Eston, to a new site of the former Levick House Care Home on land owned by the Levick Trust.

Construction commenced in 2011 to develop a 16-bed respite unit for adults aged 18 - 64, alongside 20 Older Person's Housing apartments. These apartments, intended to replace the previous care home on the site, were designed to meet the housing needs of older people in Middlesbrough. North Star Housing took on responsibility for managing the apartments as well as the building's repairs and maintenance.

However, in 2012, as the site neared completion, TEWV withdrew from the project, citing concerns about the ongoing revenue funding required to operate their element of the service. Their withdrawal also resulted in the loss of a £500,000 capital contribution, even though the building had been designed to meet clinical standards in line with their requirements. Following TEWV's withdrawal, the Council proceeded to move its respite service from St. Paul's Road and repurposed the remaining capacity at Levick Court to provide residential care. This facilitated the relocation of permanent residents from St. Paul's Road, and the service opened later in 2012.

Levick Court, operated directly by Middlesbrough Council, offered both residential and respite facilities for adults with learning disabilities aged 18 to 65. Historically the unit comprised of eight residential and eight respite beds. It had been operational for over a decade. During that time, the age profile of residents had increased, with the average age being around 60 years and some residents nearing 65. The facility was originally developed for a younger, working-age group, with a staffing model based on residents spending much of the day accessing community services. Staffing was therefore modelled on staff presence in mornings and evenings. As such the staffing model had not been able to accommodate individuals with increased daytime needs.

Respite care was vital for adults with learning disabilities and their families. It provided essential breaks, reduced carer stress, and improved the wellbeing of both carers and those receiving care. Respite services could help maintain family relationships, promote independence, and reduced the likelihood of long-term or permanent care placements.

However, demand for the service had declined in recent years, and the unit currently operated at around 37% occupancy. In some cases, Continuing Health Care (CHC) funding had supported the service to sustain capacity for individuals with complex needs, ensuring that appropriate placements remained available when required.

During the COVID-19 pandemic, the service was temporarily closed, leading to a loss of income from both user contributions and CHC-funded placements. Since reopening, revenue had only partially recovered, and a significant service redesign had been undertaken. Social care demand projections indicated that only eight respite beds would be required to meet future needs. Given the current low occupancy levels and high unit costs, Levick Court had been identified as a service in need of substantial transformation.

To meet the objectives of the transformation programme, alternative delivery models were considered, and included:

An option appraisal was undertaken to determine the future of Levick Court. Currently, on average 20 clients access respite services at Levick Court on a regular basis, with support ranging from 20 to 88 nights per year. Four of these clients received some level of health funding toward their care. The service currently employs 22.4 full-time equivalent (FTE) staff, including 3.09 FTE vacancies.

- Developing an all-age short breaks provision, potentially merging with children's respite services.
- Creating an integrated health and social care respite service.
- Full closure of Levick Court.

The Mayor stated he was pleased Levick court was to remain open. He also stated that when the Council had sufficient financial capacity it could achieve positive outcomes. The Mayor expressed his thanks to all those involved in the creation of the report.

OPTIONS

A number of options were explored before considering engagement with the Integrated Care Board which included:

- **Remaining as is, however, was not financially viable.**
- **Work with children's services to explore respite – this was not viable to the capital investment required to modify the building due to the requirements around CQC and OFSTED.**
- **Working with a private organisation to deliver services – this was not financially viable.**

ORDERED the Executive:

- 1. Approve the provision of health respite services at Levick Court, subject to the closure of the Most Suitable Provider (MSP) process being conducted by the Integrated Care Board (ICB).**
- 2. Approve the revised fees and charges schedule for Adult Social Care, as outlined in Appendix one of the report.**

REASONS

The proposed revised model would deliver the efficiencies identified within the Adult Social Care Transformation Programme and would make best use of an existing asset. More importantly, it would ensure the ongoing delivery of short breaks and respite care at a local level, while fostering greater collaboration between health and social care partners. This approach aimed to deliver improved outcomes for residents and their families.

25/48

MIDDLEHAVEN HOUSING

The Executive Member for Development submitted a report for Executive's consideration. The purpose of the report sought approval to appoint Capital and Centric as the Council's development partner to lead the regeneration of Middlehaven and develop proposals for the area up to RIBA Stage 4.

Middlehaven was the key regeneration area in Middlesbrough, with the potential to transform the economic prospects of the town, and provide new communities for people to live in. Its proximity to, and influence on, the town centre made it vitally important that the development of Middlehaven was taken forward successfully.

The development of Middlehaven had been underway for some time and had seen a number of projects on site in recent years including:

- Completion of Boho X, the 60,000 sq ft headquarters of Double 11
- Outwood Riverside secondary school scheduled to be complete by Spring 2027

- Completion of the TTE technical training facility in March 2025

The ongoing investment in Middlesbrough Railway Station and Exchange Square also provided a much improved gateway into the area. Middlehaven was, however, most notably home to the fastest growing tech cluster outside of London within the Boho Zone, with innovative companies providing hundreds of digital jobs, serving clients including Microsoft and Sony.

The growth of the digital sector had been rapid and expansive, but risks being limited by a lack of available urban living options for young professionals who were not seeking the traditional suburban product available in the rest of the town. Unless a housing offer developed at the same pace as the sector, highly trained and highly sought after young people will potentially seek accommodation elsewhere.

It was therefore critical to the future success of the town that Middlehaven was developed.

The Executive Member for Development stated that previous initiatives to develop Middlehaven had been piecemeal, but this now needed to have a joined up approach. However, there was also a need to exercise caution to ensure the development of Middlehaven was robust.

The Executive Member for Children's Services agreed that while some caution should be exercised this was an exciting development for Middlesbrough and would be a significant boost to both the Middlehaven area and the town centre generally.

The Mayor stated he was confident about the development, and that it presented an opportunity to support Middlesbrough's next industry. The Mayor also stated the decision had been reached using robust governance and financial procedures and he was excited to see how communities could be involved.

The Mayor stated that for initiatives such as this it was important that all key stakeholders, such as Teesside University, were involved in the process as much as possible.

OPTIONS

The Middlehaven site was identified in the Mayoral Development Corporation – Consultation report that was endorsed by Executive on the 22 February 2023.

The previous proposal to transfer a number of Council assets over to the MDC had been paused by the Secretary of State due to wider concerns over the governance of mayoral development corporations.

In the absence of a decision by the Secretary of State, the proposal from Capital and Centric presented an opportunity to progress the comprehensive development of the site.

The Council could elect not to proceed with the appointment of Capital and Centric and the £3.6m Towns Fund allocation could be re-purposed for urban living initiatives across the town, but the redevelopment of Middlehaven would not proceed unless significant investment could be secured.

ORDERED that Executive:

- 1. Approve the appointment of Capital and Centric as the Council's development partner to lead the regeneration and development of Middlehaven.**
- 2. Approve the use of £3.6m from the Towns Fund grant allocation for Urban Living and Placemaking to develop designs up to RIBA Stage 4 to enable the procurement of a main contractor.**
- 3. Delegates authority to the Section 151 Officer (in consultation with the Director of Regeneration) to agree any variations to the proposals within the overall budget allocation.**

REASONS

The redevelopment of Middlehaven was needed to address several critical challenges faced by the town and its surrounding areas, which were common to many towns and cities across the north.

These included:

- a) A lack of high-quality urban housing that appeals to a broad demographic, particularly young professionals and families.
- b) Underused land with limited visual and economic contribution to the town.
- c) A population decline, and in particular, the out migration of economically active individuals, resulting in reduced discretionary spending and local investment.
- d) Highly trained or qualified young people leaving the town and not returning.
- e) The need for the Council to generate additional income streams, such as enhanced Council Tax receipts will be greatly enhanced by the development of Middlehaven.

Addressing these challenges required a bold, collaborative approach to urban regeneration. Middlehaven's development would capitalise on the area's proximity to major transport links, its rich history, and its potential as a cultural and economic hub.

Capital and Centric had a track record of delivering award-winning developments that demonstrated their ability to combine expertise in creating a masterplan vision, with a commitment to long term community creation and curation. Their appointment as development partner for Middlehaven could positively impact residents and visitors for generations to come.

Uniquely, Capital and Centric were both a Development Partner and End User who would be invested in the area to ensure the sustainability of the site in the long-term.

This contrasted with previous proposals, which were to act solely as the Council's Development Partner.

25/49

2025/26 TRANSPORT AND INFRASTRUCTURE CAPITAL PROGRAMME UPDATE

The Executive Member for Environment and Sustainability submitted a report for Executive's consideration. The purpose of the report was to gain approval for the funding allocations and to outline the delivery progress of the approved schemes.

Middlesbrough Council received City Region Sustainable Transport Settlement funding via Tees Valley Combined Authority.

The 2025/26 allocations were:

- £1.065m for Integrated Transport
- £2.339m for Highways Maintenance
- £0.750m additional DfT resurfacing grant

The total proposed programme (including Council funding) was £8.436m. The Scheme-level detail and financial breakdown was outlined in Appendix one of the report while progress against schemes was outlined in Appendix 1A of the report.

The Mayor expressed his thanks to all involved in the continuing delivery of the programme.

OPTIONS

Re-assessing the project proposals was not recommended. They had been identified using a robust scoring matrix and the prescribed funding criteria; to ensure effective and prudent allocation of resources. Reassessing proposals at this stage would have undermined the integrity of this established process and introduced significant delays to a time-sensitive delivery programme. With 75% of schemes progressing on schedule and 25% experiencing only minor delays, detailed in Appendix 1A, the current approach remained the most efficient and strategically sound.

Doing nothing was also not recommended. Failing to approve the updated funding allocations and associated programme management arrangements would jeopardise timely delivery, reduce the Council's ability to respond flexibly to delivery risks, and

would have potentially resulted in underspend or clawback of CRSTS funding. The infrastructure programme required forward planning and financial approval to secure contractor capacity, align delivery windows, and remain compliant with grant conditions. Delaying approvals would have impeded progress and risk non-delivery of schemes that were essential to maintaining the highway network and improving active travel infrastructure

ORDERED that Executive:

1. Approve the continued allocation of CRSTS funding across both Highways Maintenance and Integrated Transport workstreams, noting that 75% of schemes were currently on programme (RAG: Green) and a further 25% were experiencing minor delays (RAG: Amber) but remained deliverable within the current or next financial year
2. Approve the implementation of mitigation measures for schemes at risk of delay or underspend — particularly those in the Carriageways, Structures & Bridges, and Stainton Way Phase 2 schemes — to ensure continued alignment with CRSTS grant conditions, avoid clawback risk, and maintain the Council's ability to meet statutory obligations.

AGREED that Executive

1. Note the progress to date on the delivery of the 2025/26 Capital Programme funded through the £4.154m City Region Sustainable Transport Settlement (CRSTS) grant, as detailed in Appendices 1 and 1A of the report.
2. Note ongoing programme management flexibilities, allowing officers to reprofile or reallocate approved funds where appropriate to support accelerated delivery of shovel-ready schemes or respond to emerging priorities.

REASONS

This update was necessary to ensure continued effective management of the CRSTS programme, considering delivery progress reported at Q2 (Appendices 1 and 1A of the report). While most schemes remained on track, a few key infrastructure maintenance and cycle infrastructure works were experiencing moderate delays which required Executive awareness and mitigation planning.

Without formal approval of revised profiles and proactive mitigations, the Council risked underspending the allocated CRSTS funds within the required grant periods.

The updated recommendations ensured that the authority remained compliant with grant conditions and maintained credibility with our funding partners.

Key programme risks had been identified in a small number of areas, notably:

- Carriageways and Structures & Bridges: Delivery delayed due to ongoing contract/legal issues. Completion is now forecast for Q1 of 2026/27.
- Stainton Way Phase 2 and Ormesby Beck: Minor delays due to ward-level consultation and resourcing gaps earlier in the year. Mitigations proposed include carrying forward delivery into next financial year, accelerating delivery of 'Green' rated schemes, and utilising contingency allowances for inflation or emergent issues.

While the overall programme remained strategically aligned and financially balanced: with a total funding envelope of £8.436m comprising £4.154m CRSTS and £4.282m Council funding, detailed at Appendix one of the report, the scale and complexity of schemes, combined with the need for formal approval of CRSTS allocations, meant the decision fell within Executive responsibility under Section 6.38 of the Executive Scheme of Delegation.

Understanding (MoU) with Tees Valley Combined Authority (TVCA) governing the operation of the Tees Valley Investment Zone - Middlesbrough Site and associated programme.

On 20 February 2025, Regulations were laid before Parliament that created the Tees Valley Investment Zone - Middlesbrough Site for 24 years from 1 April 2025 as a designated area for the purposes of the local retention of non-domestic rates.

The Regulations referenced a map of the Site, which in part included an existing designated area, Tees Valley EZ Growth Extension: Middlesbrough historic quarter.

It covered an area with Shepherdson Way as its most eastern extent, the River Tees near to Durham Street at its most northern, North Road adjacent to the Hartington interchange at its eastern and Waverley Street at its most southern. A location map was included in Appendix two of the MoU, located at the end of Section one.

The Regulations also record the initial baseline established for the purpose of determining additional business rates income, which was £5,131,673. The effect of the Regulations and the MoU was that any sum over this amount would be retained to be shared for the purpose of reinvestment in the Tees Valley Investment Zone programme, with 50% being paid to the TVCA and 50% held by the Council.

The existing designated area would cease to exist in April 2041, at which time the portion within the Site would be included for the purposes of calculating additional business rates. The initial baseline income from the portion was £1,730,615 and, so rather than the Council continuing to retain its share of rates income that it might then have received from April 2041, the amount of additional income would be calculated by reference to the overall combined baseline of £6,862,288 and shared for reinvestment in the Tees Valley Investment Zone programme until March 2049.

The baseline was finalised in January 2025, before detailed arrangements had been shared around the allocation for retained business rates. Investment Zone funding was not yet deployed, so it could reasonably be concluded that any growth that there may have been in the 2025/26 financial year could not be attributed to the existence of the Zone, but that growth would nevertheless be retained. The MoU would require allocation of any sum to the Zone programme and sharing with TVCA.

OPTIONS

Do nothing. whilst it was possible that increased business rates income may have been received without entering into the MoU, the substantial gain for the town represented by the government funding provided through the Investment Zone would be lost.

The terms of the MoU had been modified so far as possible in discussion between Council officers and TVCA. The scope of the original proposals to government made by TVCA meant that limits existed to the extent of change that was possible without jeopardising the provision of the funding that is available.

ORDERED that Executive:

- 1. Approves the reinvestment of additional business rates income due to the Council, generated from growth within the Tees Valley Investment Zone - Middlesbrough Site, only in meeting the needs of the Priority Sectors. This approval was subject to assurances, required from TVCA, around the decision-making processes for projects the TVCA was responsible for.**
- 2. Delegates authority to the s151 Officer to finalise and authorise the draft Memorandum of Understanding (MoU) with the Tees Valley Combined Authority (TVCA)**

AGREED that Executive notes the Council's engagement in delivering the Tees Valley Investment Zone programme.

REASONS

The decision was required as a pre-requisite to Central Government providing £80m of

funding available to the Tees Valley Investment Zone. If the Council was unable to enter into a MoU with TVCA, the funding would not be available to promote growth in the town.

It was a key decision that impacted on two or more wards and would likely have financial consequences totalling more than £250,000.

25/51

TS1 PSPO EXTENSION - CONSULTATION RESULTS

The Executive Member for Neighbourhoods submitted a report for Executive's consideration. The purpose of the report was to seek Executive approval for the request to extend the Public Space Protection Order (PSPO) that covers the TS1 area. The current PSPO will expire on 25th November 2025.

PSPO's could be determined by a Local Authority where it was satisfied that two conditions were met:

- a) It was likely that activities in a public place within the Authorities area had, or would have, a detrimental effect on the quality of life of those in the locality.
- b) The effect of those activities was, or was likely to be, of a persistent or continuing nature: as such as to make the activities unreasonable and that the effect of likely effect of the activities justified proposed prohibitions.

A PSPO did not have effect for longer than three years, however it could be extended more than once if required.

The current PSPO prohibited a list of actions within the designated area. The prohibited actions were listed in the report and included:

- Drinking Alcohol in public
- Littering
- Begging
- Skate boarding, using scooters, skates or bikes (including mechanically propelled bikes or vehicles) in such a way as to be a nuisance to others or cause damage to property
- Spitting
- Urinating or defecating
- Gangs of more than three causing harassment alarm or distress
- Verbal abuse and threatening and intimidating behaviour Dog control (including dogs to be required on leads, dog fouling and having control of more than four dogs)
- Rummaging in bins
- Appropriating monies for charitable or other purposes without a licence including asking members of the public to sign up to schemes.

To extend the PSPO Executive needed to be satisfied, on reasonable grounds, that the extension was necessary to prevent the occurrence or recurrence of the detrimental activities or to prevent an increase in the frequency or seriousness of those activities.

The current PSPO came into effect on 26 November 2022 for a period of three years. It would therefore expire on 25th November 2025.

The formal consultation on the extension of the PSPO ran for a two-week period starting on 03/10/2025 until 17/10/2025. The consultation was publicised via local media links as well as being prevalent on the Council's website. Letters were also sent to all key stakeholders and posters were displayed in public buildings alongside prominent signage displayed in various locations.

The results of the consultation showed there was strong support for an extension of the PSPO. The total number of respondents was 77. The makeup of the respondents was detailed in the report.

OPTIONS

Not to extend the PSPO. This was not recommended as there was still a high level of crime and antisocial behaviour in the TS1 area and the current Order gave powers to the Local Authority to act regarding the prohibited behaviour. If the order was not made the activities would reoccur or would increase in frequency or seriousness to the detriment of the community and the public.

ORDERED that Executive approve the request to extend the Public Space Protection Order (PSPO) that covered the TS1 area for a further three years from the 25 November 2025

REASONS

The current PSPO expired on 25th November 2025.

The consultation supported the extension of the PSPO in the TS1 area for a further three years

It was felt the content of the report provided enough information to satisfy Executive, on reasonable grounds, that the extension was necessary to prevent the occurrence or recurrence of the activities prohibited or restricted in the Order or to prevent an increase in frequency or seriousness of those activities if the Order was to expire.

25/52

WARM HOMES: LOCAL GRANT – HOME ENERGY EFFICIENCY IMPROVEMENT SCHEME

The Executive Member for Neighbourhoods submitted a report for Executive's consideration. The purpose of the report sought approval for the Council to take part in the Warm Homes Grant Scheme which would enable eligible residents to access funding to make their homes warm and safe to inhabit.

The government had committed to partnering with combined authorities as well as local and devolved governments to deliver insulation measures and other improvements such as solar panels, PV batteries and low carbon heating.

Their aim was to cut bills for families, reduce fuel poverty, and reduce carbon emissions in support of its net zero 2050 target.

The Warm Homes: Local Grant scheme was a government-funded scheme delivered by local authorities that would take the first steps to delivering on the ambitions of the Warm Homes Plan. It would provide grants for energy performance upgrades and low carbon heating to low-income households living in the worst quality, privately owned homes in England to achieve energy bill savings and carbon savings.

Middlesbrough Council, in partnership with Darlington Borough Council, Redcar and Cleveland Borough Council and Stockton on Tees Borough Council had been awarded Warm Homes grant funding of £13.9m. The scheme aimed to improve the energy efficiency rating of around 700 homes in the Tees Valley.

The four local authorities had been developing the Tees Valley scheme to ensure the requirements for administering the grant funded scheme were met. The scheme would be delivered by a single private energy provider, chosen through the NEPO framework, and who had a proven track record of delivering energy efficiency schemes. The provider would use its own workforce and local trades to identify properties that would benefit from home energy improvements, assess what energy efficiency measures could be made to dwellings and carry out works to improve energy efficiency rating to EPC 'C' or above.

By working with an energy provider, who had extensive knowledge and experience delivering home energy improvements, this enabled a more streamlined, cost-effective and manageable delivery of the scheme. A turnkey provider could handle the complexities of delivering this large-scale programme of home improvements, deliver consistent services, address technical issues and supply issues effectively, as well as provide a single report on the delivery of scheme to consortium members.

Should the delivery of the grant scheme be managed by the local authorities granted funding,

this would have significantly increased the demand on resources in each authority and as such may have led to the scheme not being viable.

There were three ways that properties could be approved for energy efficiency improvement works. These were:

- i. The household lived in a valid postcode that fell within eligible income deciles 1-2 of the Indices of Multiple Deprivation. The report stated that properties in Income Deciles 1-2 of the Indices of Multiple Deprivation in Middlesbrough were predominantly in postcode areas TS1, TS2, TS3, and TS4.
- ii. The household was in receipt of a specified means-tested benefit.
- iii. The household's gross annual income was below £36,000 (or the equivalent) 'after housing costs' threshold for their household composition.

Darlington Council would coordinate and manage the grant funding on behalf of the consortium members. Middlesbrough Council's Public Protection Service would performance manage the grant usage in Middlesbrough and report this to the Director of Environment and Community Services.

The Mayor stated this was an important initiative and the Council had not played a role in housing for some time. He also stated there was a need for residents to have a decent standard of housing.

OPTION

Not to approve Middlesbrough's involvement in the delivery of the Warm Homes: Local Grant scheme. This decision was not recommended due to the benefits the scheme would bring to low-income households and the investment in housing stock in Middlesbrough.

Many local authorities had taken a consortium approach when applying for grant funding for local home improvements. This approach enabled authorities to benefit from economies of scale, maximise the amount of grant funding that could be awarded, effectively engage with a single turnkey provider and deliver the scheme on a large scale. Darlington Council had developed considerable experience in the delivery of home energy improvement schemes, alongside Stockton on Tees and Redcar & Cleveland. By joining with these Councils it had enabled Middlesbrough Council to offer a home energy improvement scheme that would benefit local people, particular those in low-income households.

ORDERED that Executive:

1. Approves the Council taking part in Warm Homes: Local Grant Scheme.
2. Approves entry into associated agreements in relation to the grant.

AGREED that Executive:

1. Notes that the scheme will be delivered by Darlington Borough Council on behalf of Middlesbrough Council.
2. Notes that the Public Protection service will performance manage the grant usage of the scheme in Middlesbrough and report this to the Director of Environment and Community Services.

REASONS

The proposed recommendation supported the Council's ambition to achieve a healthy place. To improve the energy efficiency of properties occupied by low-income households and properties that had substandard energy performance ratings.

The grant would improve energy performance in private residential dwellings to reduce fuel poverty and the health risks associated with poor energy protection, including risks linked to damp and mould. It would also make houses more cost-efficient to heat and create more sustainable dwellings.

CONSIDERED.

None.

All decisions except the decision relating to item 15 (TS1 PSPO Extension – Consultation Results) will come into force after five working days following the day the decisions were published except unless the decisions become subject to the call in procedures.

The decision relating to item 15 (TS1 PSPO Extension – Consultation Results) will come into force immediately as it was considered under urgency provisions.

EXECUTIVE SUB-COMMITTEE FOR PROPERTY

A meeting of the Executive Sub-Committee for Property was held on Wednesday 19 November 2025.

PRESENT: Mayor C Cooke (Chair) and Councillors I Blades, T Furness, L Henman, J Rostron, P Storey and N Walker

OFFICERS: K Allan, S Bonner and A Johnstone

APOLOGIES FOR ABSENCE: Councillor J Ryles

24/15 DECLARATIONS OF INTEREST

Name of Member	Type of Interest	Item/ Nature of Interest
Cllr N Walker	Non-Pecuniary	Item 3. Cllr Walker submitted a proposal as Ward Cllr for Hemlington. As such abstained from the vote.

24/16 MEMBERS SMALL SCHEME ALLOCATIONS

The Executive Member for Finance submitted a report for the Executive Sub-Committee's consideration.

The purpose of the report was to consider applications submitted by Members for the small scheme allocation, which allowed each ward to submit one application for grant funding of up to £15,000 to deliver improvements as part of the capital programme. Where project costs exceeded this limit, match funding from relevant service areas was sought.

Eleven applications, covering the wards of Acklam, Ayresome, Berwick Hills and Pallister, Coulby Newham, Hemlington, Kader, Marton East, Marton West, Newport, Nunthorpe, and Trimdon, had been received and subsequently assessed by Council Officers to determine suitability, affordability, and deliverability. Following assessment, two projects were identified as undeliverable, as outlined in Table 2 of Appendix 1. Members noted that it would be useful to have further details on which areas within each ward would be impacted.

The supported schemes primarily focused on highway improvements and environmental enhancements, including traffic calming measures, zebra crossings, footpath connections, park refurbishments, speed signs, litter bins, and CCTV installations. All supported schemes were recommended for approval, and most had confirmed match funding from service areas such as Highways, Middlesbrough priority fund, and Environment.

The review of submitted schemes indicated that a total of £143,400 was requested across all proposals. Of this, £113,400 was requested for supported schemes, representing the majority of submissions, with match funding contributions totalling £99,050, including £89,050 for the proposed approved schemes.

In contrast, schemes that had not been supported had requested a combined total of £30k, with an indicative cost of £40k. These proposals had included ANPR cameras, which were not considered appropriate for Council use, and a pedestrian crossing that was located outside of the Council's adopted highway. Although some match funding had been identified, these schemes had not been recommended for approval. Members discussed that it would be useful to review the two applications that were not approved and the rationale behind these decisions at a future Executive meeting, as the report appeared contradictory. It stated that ANPR cameras were not appropriate for council use; however, it also indicated that further investigation would be undertaken regarding data protection.

Members discussed the application timeframe and following consultation with the Section 151 Officer, it was suggested that the bidding period for the next financial year should take place

between November and the end of January to enable potential schemes to be programmed into the capital programme for the following financial year. It was proposed the report be amended to include this suggestion.

Thanks were expressed to both Members and Officers for their contributions to the process.

The Mayor proposed that an update be provided to Executive regarding those submissions that had not been successful and how they could be progressed going forward.

The Executive Member for Neighbourhoods arrived at the meeting following the debate and abstained from the vote.

OPTIONS

The Council had the option not to approve the funding however this was not recommended as the proposals had been assessed by Officers for suitability and were deemed as acceptable improvements. Those that were not suitable had been omitted, and the value of those proposed to proceed are within the available funding allocation.

The Mayor conducted a vote on the proposed amendments to the report.

ORDERED that the Sub Committee for Property:

1. Approve an amendment to the report reflecting that the next round of bidding take place between November and January to allow schemes to be approved for the start of the new financial year.
2. Receive an update regarding those submissions that had not been successful on this occasion and how they could be progressed going forward.

The Mayor conducted a vote on the substantive decision.

ORDERED that the Sub Committee for Property:

1. Approve the eligible Members' Small Scheme project allocations, following applications from Members and assessment by Council Officers.

REASONS

The recommendations ensured the appropriate use of the Members' Small Scheme grant and empowered Councillors to deliver meaningful improvements within their wards. The approved schemes confirmed that the overall budget had not been exceeded. A more structured bidding process would enable officers to programme the work with sufficient notice. Providing additional information and rationale would give Members and residents clarity on why certain applications had been rejected.

24/17

ANY OTHER URGENT ITEMS WHICH IN THE OPINION OF THE CHAIR, MAY BE CONSIDERED.

None.

The decision will come into force after five working days following the day the decision was published unless the decision becomes subject to the call in procedures

MIDDLESBROUGH COUNCIL	
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Report of:	Andrew Humble – Dir. of Finance and Transformation (s151 Off.) Richard Horniman – Dir. of Regeneration Geoff Field – Dir. of Environment and Community Services
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Relevant Executive Member:	Cllr Nicky Walker - Executive Member for Finance Cllr Theo Furness - Executive Member for Development Cllr Peter Gavigan Executive Member for Environment and Sustainability
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Submitted to:	Executive
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Date:	3 December 2025
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Title:	Final Report of the Place Scrutiny Panel - Empty Properties
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Report for:	Decision
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Status:	Public
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Council Plan priority:	A successful and ambitious town
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Key decision:	No
Why:	Decision does not reach the threshold to be a key decision

Subject to call in?	Yes
Why:	Non-Urgent Report

Proposed decision(s)	
That Executive:	
• APPROVES the Empty Properties Action Plan at Appendix 1. • NOTES the additional demand on resource and cross-departmental collaboration required for successful delivery.	

Executive summary	
This report seeks approval for the response and actions proposed following receipt of recommendations referred to the Executive by the Overview and Scrutiny Board at a meeting on 30 July 2025 aimed at reducing the number of empty properties across the borough. The recommendations are designed to enhance housing availability, mitigate urban decline, and contribute to broader regeneration objectives. Not all of the recommendations are to be taken forward, at least initially, as the objectives overall	

would not be served and the action suggested could be counter-productive to existing service delivery.

The implications of the proposed recommendations have been thoroughly assessed by relevant Council officers and are outlined in detail within the Action Plan at Appendix 1.

Purpose of this report and its contribution to the achievement of the Council Plan ambitions

1.1 This report references the findings and recommendations from the Scrutiny Panel review of empty properties and sets out an Action Plan for approval, in response.

1.2 It contributes to the Council Plan ambitions by supporting housing regeneration, improving neighbourhoods, and encouraging investment in the local area.

Our ambitions	Summary of how this report will support delivery of these ambitions and the underpinning aims
A successful and ambitious town	• <i>Supports regeneration by bringing long-term empty properties back into productive use.</i> • <i>Enhances housing availability to meet local demand and attract inward investment.</i> • <i>Contributes to neighbourhood renewal, improving the town's appeal to residents and businesses.</i>
A healthy Place	• <i>Reduces urban blight and improves environmental quality through reuse and regeneration.</i> • <i>Promotes healthier living environments by tackling dereliction and associated anti-social behaviour.</i> • <i>Encourages inclusive growth by addressing housing inequality.</i>
Safe and resilient communities	• <i>Improves community safety by reducing the prevalence of neglected and unsecured properties.</i> • <i>Enables better use of enforcement powers to address unsafe or problematic buildings.</i> • <i>Supports temporary accommodation solutions for vulnerable residents, including care leavers.</i>
Delivering best value	• <i>Maximises council tax recovery and reduces financial losses associated with long-term vacancies.</i> • <i>Aligns with strategic housing objectives and ensures efficient use of existing resources.</i> • <i>Encourages cross-departmental collaboration to deliver sustainable outcomes.</i>

2. Recommendations

2.1 That the Executive:

APPROVES the Empty Properties Action Plan at Appendix 1.

NOTES the additional demand on resource and cross-departmental collaboration required for successful delivery.

3. Rationale for the recommended decision(s)

3.1 The Place Scrutiny Panel's review of the Empty Properties Strategy resulted in a series of recommendations requiring formal consideration. In response, a comprehensive Action Plan has been developed, outlining proposed measures that now require Executive approval to proceed.

3.2 The recommendations of this report are underpinned by the strategic imperative to address the growing number of long-term empty properties, which adversely affect housing supply, neighbourhood vitality, and the Council's financial resilience. The proposed actions are designed to promote reoccupation and align with broader housing and regeneration objectives.

3.3 Properties that remain vacant for extended periods contribute to reduced housing availability and can adversely affect the Council's financial position. In the absence of targeted intervention, the Council faces the risk of continued financial losses and missed opportunities to revitalise neighbourhoods and increase the supply of available housing.

4. Background and relevant information

4.1 In 2024, the Place Scrutiny Panel initiated a review of long-term empty properties in response to growing concerns regarding the increasing number of vacant residential and commercial buildings across the borough. These properties were identified as contributing to neighbourhood decline and reducing the availability of housing.

Accordingly, the Panel established the following Terms of Reference:

- To understand the current position with regard to empty domestic and commercial properties in Middlesbrough and the efforts the Council is making to address the various associated issues.
- To investigate the Council's responsibilities and enforcement powers in respect of empty properties.
- To investigate what work has been undertaken with third party providers to refurbish and re-let empty properties.
- To investigate what work has been undertaken to bring empty commercial properties back into use.

- 4.2 The review was informed by cross-service collaboration, drawing on evidence and expertise from officers within Resident and Business Support, Enforcement, Legal, and Regeneration. This multi-disciplinary approach ensured a comprehensive understanding of the challenges and opportunities associated with long-term empty properties.
- 4.3 The review culminated in a series of draft recommendations aimed at enhancing the Council's strategic and operational capacity to manage and reduce the number of empty properties.
- 4.4 The findings and draft recommendations were considered, endorsed and referred to the Executive by the Overview and Scrutiny Board at a meeting on 30 July 2025.
- 4.5 Prior to submission, the recommendations were subject to detailed review by relevant service areas. This process informed the development of a robust Action Plan, which sets out a coordinated response and provides a framework for implementation, subject to Executive approval.

5. Ward Member Engagement if relevant and appropriate

- 5.1 Ward members have not yet been formally engaged or invited to review the responses set out in the Action Plan, beyond their initial contributions to the development of the Place Scrutiny Panel report. Further engagement with ward members will be explored during the implementation phase to ensure the Action Plan remains aligned with local priorities.

6. Other potential alternative(s) and why these have not been recommended

- 6.1 The rationale for adopting alternative approaches in certain instances has been detailed within the action plan.

7. Impact(s) of the recommended decision(s)

The recommended actions are expected to deliver improvements in neighbourhood conditions, expand the availability of housing, and generate additional revenue for the Council through increased council tax contributions. It is acknowledged that implementation may have resource implications, which will be subject to further detailed assessment.

Topic	Impact
Financial (including procurement and Social Value)	The initiative presents opportunities to deliver Social Value through the regeneration and productive reuse of long-term vacant properties, contributing to broader community and economic development objectives. As far as can be determined, the actions required can be delivered within existing resources and without a requirement for procurement.

Legal	Increased use of enforcement powers (e.g., CPOs, Demolition Orders) will require legal oversight and compliance with statutory frameworks. Policy changes may require formal approval and consultation.
Risk	These may include • legal challenges from property owners • reputational, if enforcement is perceived as unfair • financial, if sums billed are not collected • operational, if resources are insufficient to deliver actions.
Human Rights, Public Sector Equality Duty and Community Cohesion	Actions must be compliant with equality duties and human rights legislation. Reuse of properties may support community cohesion by reducing blight and improving neighbourhoods.
Reducing Poverty	Bringing properties back into use may increase access to affordable housing and temporary accommodation, supporting vulnerable groups and reducing housing-related poverty.
Climate Change / Environmental	Reuse and regeneration of existing buildings can reduce environmental impact compared to new builds. Demolition and redevelopment must consider sustainability and waste management.
Children and Young People Cared for by the Authority and Care Leavers	Improved access to housing, including temporary accommodation, may benefit care leavers and young people in need of stable living arrangements.
Data Protection	Data matching and property intelligence must comply with data protection regulations, including secure handling of personal and property-related information.

Actions to be taken to implement the recommended decision(s)

Subject to formal approval, the proposed actions will be incorporated into the Housing Transformation Programme. Responsibility for leading and coordinating delivery will rest with Resident & Business Support. Progress will be monitored through established governance mechanisms to ensure alignment with strategic objectives and accountability for outcomes.

Action	Responsible Officer	Deadline
Implement the Empty Property Action Plan	As set out in the Action Plan	As set out in the Action Plan

Appendices

1	Empty Properties Action Plan
2	

Background papers

Body	Report title	Date
Overview and Scrutiny Board (Item 25/14)	Final Report of the Place Scrutiny Panel - Empty Properties	30 July 2025

Contacts: Emma Dorgan, Janette Savage
Email: emma_dorgan@middlesbrough.gov.uk
Janette_Savage@middlesbrough.gov.uk

**PLACE SCRUTINY PANEL
EMPTY PROPERTIES**

SCRUTINY RECOMMENDATION	PROPOSED ACTION	POST TITLE	BUDGET COST	TIMESCALE
A) Introduce a charge of 100% Empty Property Council Tax Premium after year 1 instead of year 2 which it is currently.	Action/Response: The Executive welcomes any ideas and suggestions that could bring empty properties back in to use and whilst this is an option that the Council could consider, the preference would be to embed the empty property strategy and associated actions, tracking the impact prior to making any further changes. By doing so, provides the service with an opportunity to track each individual improvement as it is introduced. Actions linked to the strategy (this list is not exhaustive). • Explore opportunities for private leasing scheme, tenant finder schemes and social letting. • Explore partnership working with local registered providers. • Develop links with internal and external agencies, letting agents and responsible landlords. • Progress with enforcement options, such as CPO, Empty Dwelling Management Orders and Enforced Sales, Charging Orders.	Head of Resident & Business Support		Review by 30 December 2026

	Once embedded the service intends to review the effectiveness/gaps balanced against the resource/level of impact to determine appropriate next steps that would support a reduction in empty properties, one of which may lead to a review of the empty property premium. Maintaining the current two-year period at this time remains the most balanced and pragmatic approach to achieving the intended policy outcomes. Evidence suggests that an increased charge does not necessarily lead to re-occupation, rather the reliance on other Council Tax Legislation means the premium can't always be applied. Furthermore, whenever a premium charge is to end or be removed an inspection is carried out to confirm circumstances and, though the additional dwellings involved would amount to less than 20% of the total that are empty, the resource required to continue to verify occupation or furnishing would likely incur additional cost.			
B) Impose the maximum premium for properties which have been empty for 10 years or more.	Action/Response:			

	The Executive welcomes any suggestions that could bring more properties back into use and has considered options around long term empty properties, however they tend to be very complex and changing this aspect of the current approach is unlikely to yield the desired outcome. The Council is continuing to review all options as part of its 'new' Empty Property Strategy and would be happy to reconsider this option once the strategy has been embedded and the Council understands its effectiveness and gaps (see item A above for the extended rationale).	Head of Resident & Business Support		Review by 30 December 2026
C) Ensure that all enforcement powers available to the Council such as Completion Notices and Demolition Orders in relation to empty properties are utilised where appropriate and justify any failure to do so.	Action/Response: Use of Completion Notices for new-build properties is already embedded within the Investigations team's standard operating procedures. Enforcement powers are applied/used based on circumstances/suitability and on a case-by-case basis Whilst Demolition Orders are a power that already exists this power carries limitations to such situations like Category 1 Hazards, examples of which are structural collapse, asbestos, explosions, and situations	Strategic Business Manager/ Investigations and Enforcement Operations Manager	Within existing resources	Continuing

	that can lead to serious injury, although this list is not exhaustive. A combined list of powers already exists. Cases are assessed to determine the most suitable course of action/intended outcome and progressed accordingly. (Also see item F below).			
D) Produce a database of derelict empty properties and report annually to the Executive and/or the Place Scrutiny Panel.	Action/Response: To develop a report for presentation to the Executive and/or Place Scrutiny Panel, summarising insights from the Information which is held. Information is held in multiple systems. A dashboard will be developed using Power BI, to summarise the current position into one central point. This is a future planned enhancement and is an action within the Empty Property Action Plan.	Head of Resident and Business Support Investigations and Enforcement Operations Manager/Head of Neighbourhoods/ Head of Strategic Housing.	Within existing resources	31 August 2026
E) Review empty properties across the town by carrying out data matching using the electoral register, council tax list and business rate list.	Action/Response: The Executive welcomes all suggestions of options for use of data to improve outcomes. The Council's Customer theme within the Transformation Programme is exploring improved use of data to achieve better outcomes, which			

	includes this element through the single use of data. At this time, the Service already uses a more accurate data set which is contained within the NEC system. Note: A further enhancement to this action is a key project within the Customer Transformation Programme - 'single view of the customer'. This is an emerging project that will gather information to form a single view, negating the need for residents to engage/report/inform the Council multiple times. It is intended that this project will strengthen data matching opportunities.			
F) Make greater use of Compulsory Purchase Orders for residential properties and smaller commercial properties such as small shops below flats. For commercial properties investigate schemes such as the High Street Rental Auctions scheme.	Action/Response: There are many enforcement powers/tools available to and used by the Council to undertake enforcement linked to bringing properties back into use. CPOs and the auction scheme are two of the many tools that can be used (Empty Property Strategy Enforcement Powers). Enforcement powers are assigned on suitability of circumstance and on a case-by-case basis to ensure the best possible outcome and with a clear focus on reducing the number of empty	Strategic Business Manager – Resident & Business Support	Within existing resources	Continuing

	properties. Nb. OSB were informed that should the Council acquire properties through a compulsory purchase order, the responsibility of the property falls to the Local Authority as does any risk, repairs, payment of Council Tax or Business Rates, therefore it is important that the powers given to the Local Authority are used appropriately and provide the intended outcome. The support of the scrutiny panel was welcomed when this was considered by the panel some time ago and the service have already implemented changes to support this recommendation prior to this being formalised. As the recommendation has already been implemented and noting this will continue to evolve and reviewed by officers it is proposed that this recommendation be closed.			
G) Explore how the Selective Landlord Licensing Scheme can be made into less of a deterrent to letting out empty properties, by allowing landlords to pay the Selective Landlord License fee over 60 monthly payments instead of up front. Also by providing a waiver of future	Action/Response: Fees charged are less than council tax demanded on empty dwellings and this should be an incentive of itself to let. The Selective Landlord License fee covers the cost of administering the scheme e.g. issuing licences and the			

payments if the landlord sells the property.	enforcement of licence conditions, housing standards and reducing ASB associated with rented properties. The fee is calculated on the salary, administration, training and legal costs required to deliver the scheme. The owners of all private rented properties in the scheme's area are required to pay the fee when the scheme commences. The fee is split into two equal payments. The initial payment is 50% of the fee which covers the cost of processing their application and the initial administration of the scheme. The second fee payment covers the ongoing administration and enforcement of the scheme: inspection visits, collation of documentation, and enforcing ASB and Housing Act legislation. This second payment can be paid by instalments over a period of between 3 and 12 months depending on the number of properties being licensed. Allowing owners to pay over a longer time period such as 60 months could make it difficult to manage the budget and ensure that the income is achieved to cover the cost of the scheme. There is a greater risk that owners would default on their payments and there would be additional resource costs in ensuring that all the payments are up to date. Considerable input is already			
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	put into ensuring properties are licensed and recovering unpaid part fees would become an enforcement matter which would require additional resource and could divert officers from the delivery of the scheme. If the income is not achieved to cover the cost of the scheme, then this will become a pressure on the Council's budget.			
H) Encourage Social Housing Providers to demolish uneconomical properties that cannot be brought back into use or encourage them to sell to other developers or owner occupiers and to reinvest any money generated into their current stock.	Action/Response: Engage with registered providers to facilitate discussions and contribute to the development of formal guidance concerning asset disposal and reinvestment. This is one of the actions contained in the Empty Property Action Plan – see item A above.	Head of Strategic Housing	Within existing resources	31 March 2027
I) Investigate if CPOs can be issued for unsafe buildings so that they can be demolished by the Council and associated costs passed onto the owner.	Action/Response: Work collaboratively to reflect on relevant legal and safety considerations and explore potential approaches for addressing concerns around unsafe properties.	Head of Strategic Housing	Within existing resources	30 June 2026
J) Explore ways of getting long-term empty properties back into use through affordable rents/full market rents or owner occupation as well as social rent.	Action/Response: Identify and develop pathways and incentives to support reuse across different tenure types	Head of Strategic Housing	Within existing resources	30 September 2026
K) Investigate if empty social housing properties that are difficult to let could be	Action/Response:	Head of Strategic Housing	Within existing resources	31 March 2026

used by the council to provide temporary accommodation.	Engage with RPs to explore suitability of properties for temporary accommodation use			
L) Explore all possible channels of funding and work with more developers, social housing providers and private landlords to bring empty properties back into use, including office to residential conversions.	Action/Response: Map potential funding sources and foster collaborative opportunities with relevant stakeholders	Head of Strategic Housing	Within existing resources	31 March 2026
M) Explore alternative ways of dealing with non-residential empty properties that have been taken out of the rateable value ratings where the owner shows no intention of developing the property. Seek to ask Government to change rules on the rating system so not to be exploited/abused by landlords.	Action/Response: Review broader policy themes and identify any areas that may benefit from further dialogue or external engagement, whilst also continuing with discussions with the Valuation Office Agency who are responsible for the rating list. For Government changes, this will likely fall to Executive who may wish to consider any representation they would want to make to Central Government regarding this point.	Head of Resident & Business Support	Within existing resources	30 June 2026

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MIDDLESBROUGH COUNCIL

Report of:	Chief Executive, Erik Scollay
Relevant Executive Member:	The Mayor, Chris Cooke
Submitted to:	Executive
Date:	3 December 2025
Title:	Corporate Performance Quarter Two 2025/2026
Report for:	Decision
Status:	Public
Council Plan priority:	All
Key decision:	No
Why:	Decision does not reach the threshold to be a key decision
Subject to call in?	Yes
Why:	All Executive decisions that are non-urgent are subject to call in.

Proposed decision(s)

That Executive:

- approves proposed changes to the Executive actions, detailed at Appendix 1
- approves the proposed changes to the Council Plan 2024-27 supporting workplan actions, detailed at Appendix 3
- notes delivery status of the Council Plan 2024-27 supporting workplan, detailed at Appendix 2
- notes the progress and position of the corporate performance disciplines, including activity within the Transformation Portfolio
- notes the Strategic Risk Register, at Appendix 4

Executive summary

This report advises the Executive of progress against corporate performance at Quarter Two 2025/26, providing the necessary information to enable the Executive to discharge its performance management responsibilities against the following performance disciplines:

- Actions pertaining to decisions approved via Executive reports
- Delivery of the Council Plan 2024-27 and associated outcome measures
- Strategic Risk Register performance
- Programme and Project management performance
- Transformation progress and performance, and
- Other matters of compliance

1. Purpose of this report and its contribution to the achievement of the Council Plan ambitions

1.1 This report advises the Executive of corporate performance at the end of Quarter Two 2025/2026, and where appropriate seeks approval of any changes, where these lie within the authority of the Executive. The primary purpose of the report is to set out how effectively the Council is delivering activity to deliver against each of the Council Plan priorities, aims and underpinning workplan activities.

Our ambitions	Summary of how this report will support delivery of these ambitions and the underpinning aims
A successful and ambitious town	13 Council Plan Workplan initiatives are supporting delivery of the Council Plan's ambitions and aims to achieve a successful and ambitious town which are reported within this report.
A healthy place	22 Council Plan Workplan initiatives are supporting delivery of the Council Plan's ambitions and aims to achieve a healthy place which are reported within this report.
Safe and resilient communities	8 Council Plan Workplan initiatives are supporting delivery of the Council Plan's ambitions and aims to achieve safe and resilient communities across Middlesbrough which are reported within this report.
Delivering best value	13 Council Plan Workplan initiatives are supporting delivery of the Council Plan's ambitions and aims to achieve safe and resilient communities across Middlesbrough which are reported within this report.

2. Recommendations

2.1 That the Executive:

- approves proposed changes to the Executive actions, detailed at Appendix 1
- approves the proposed changes to the Council Plan 2024-27 supporting workplan actions, detailed at Appendix 3
- notes delivery status of the Council Plan 2024-27 supporting workplan, detailed at Appendix 2
- notes the progress and position of the corporate performance disciplines, including activity within the Transformation Portfolio
- notes the Strategic Risk Register, at Appendix 4

3. Rationale for the recommended decision(s)

3.1 To enable the effective management of performance and risk in line with the Council's Local Code of Corporate Governance.

4. Background and relevant information

- 4.1 The Council's Scheme of Delegation gives the Executive collective responsibility for corporate strategic performance, together with associated action.
- 4.2 This report provides the necessary information to enable the Executive to discharge its performance management responsibilities, setting out progress against priority performance disciplines and other key associated items, together with actions to be taken to address any issues identified.
- 4.3 The projected financial outturn at Quarter Two 2025/2026 is presented separately to this meeting of the Executive, and so not repeated here. There are plans in development to integrate performance, risk and financial reporting for future financial years.
- 4.4 As part of continuous improvement in performance and risk management, the Council's Leadership Management Team (LMT) has implemented monthly reviews of corporate performance utilising a Directorate Performance dashboard, drawing data from a range of performance feeder systems.
- 4.5 The output from these sessions is reflected through quarterly updates to the Executive and covering in addition, progress in delivering actions agreed by the Executive, key Directorate performance issues and other performance-related matters.

Overall progress at Quarter Two 2025/26

- 4.6 The Council's performance overall at the end of Quarter Two 2025/26 saw progress towards expected performance standards, as set out in the Council's risk appetite, achieved in two of the five corporate performance disciplines.

Performance discipline	Q2 2025/26	Q1 2025/26	Expected standard	Standard achieved	Trend
Executive actions	75% (60/80)	69% (50/72)	90%	No	↑
Council Plan 2024-27 outcome measures	25% (10/40)	20% (8/40)	90%	No	↑
Council Plan workplan	97% (54/56)	88% (44/56)	90%	Yes	↑
Strategic Risk Register	95%	93%	90%	Yes	↑
Programme and Project Management	79% (34/43)	100% (17/17)	90%	No	↓

- 4.7 It should be noted that performance against Programme and Project Management for Quarter Two 2025/26, is against all programmes and projects within the overarching portfolio, which now includes transformation programmes and projects, previously reported separately.
- 4.8 It should be noted that performance against Council Plan outcomes for Quarter Two 2025/26 is measured by tracking progress against baseline key performance indicators, as outlined in the Council Plan 2024-27 and its associated workplan. It is expected that, over time, 90% of the outcome measures will be achieved.

Progress in delivering Executive actions

- 4.9 Actions agreed by the Executive to deliver approved decisions are tracked by LMT each month. If, following Executive approval, any action is found to be no longer feasible, appropriate, or cannot be delivered within the approved timescales, this report will be used to advise the Executive of such, and to seek approval of alternative actions or amended timescales.
- 4.10 At Quarter Two 2025/26, 60 of 80 live actions (75%) were reported as on target to be delivered by the agreed timescales; an improvement from the 69% reported at Quarter One 2025/26, though continuing to remain below the 90% expected standard of achievement of actions.
- 4.11 There are 15 proposed amendments to Executive actions presented for approval at Quarter Two, which are detailed at Appendix 1. It is assumed that the remainder of Executive actions will be achieved within originally approved timescales and a further update on progress against plans will be provided at Quarter Three 2025/26.
- 4.12 Of the 15 proposed amendments detailed in Appendix 1, the reasons for the proposed amendments are as follows:
- The *Middlesbrough Council Target Operating Model* report included an action relating to mapping out the next steps for implementation, delayed from 31/03/2025 to 30/09/2025 and a further delay to 31/12/2025, due to a dependency on recruiting to the Transformation lead post.
 - The *Resetting the Council's Approach to Transformation and Delivery of the Council Plan* has an action, relating to the establishment of a continuous improvement team, which is delayed from 30/06/2025 to 30/09/2025 and a further delay to 31/03/2026, due to a dependency on recruiting to the Head of Transformation post.
 - The *Disposal of land at Hemlington Grange West* report has nine actions at risk, relating to the outcome of Biodiversity Net Gain (a legal requirement of the planning process) to progress, with an overall expected delay in timescales from 14/09/2027 to 11/09/2028.
 - The *SHiFT Programme Progress Update* report has an action to provide a six-month update on progress, delayed from 30/09/2025 to 31/12/2025 due to a change of Executive Director of Children's Services.
 - The Residential and Supported Accommodation for Children in Our Care and Care Leavers Update report has an action relating to providing an update on the new approach and impact, delayed from 30/09/2025 to 31/12/2025 due to additional time required to confirm project approach and financial impact.
 - The *Environment Scrutiny Panel Waste Management Action Plan* included an action related to the provisioning, positioning and placement of bins on new developments, which is delayed from 31/07/2025 to 28/02/2026 due to awaiting the outcome of consultation with key stakeholders.
 - The *Housing Supply* report has an action relating to completing refurbishment works on Tranche 1, delayed from 31/08/2025 to 31/12/2025 due to a proposed change of approach to delivery that will be set out in a report to Executive in December 2025.

Progress in delivering the Council Plan 2024-27

- 4.13 The Council Plan is the Council's overarching business plan for the medium-term and sets out the priorities of the Elected Mayor of Middlesbrough and the ambitions for our communities and the ways in which we seek to achieve them.
- 4.14 The Leadership Team collaborated with the Mayor and the Executive to develop and shape the Mayor's priorities for the town, to inform the Council Plan 2024-27.
- 4.15 The Council Plan articulates the four priorities of the Mayor and outlines the approach that will be taken to addressing those priorities:

Mayor's Priority	Description
A successful and ambitious town	Maximising economic growth, employment, and prosperity, in an inclusive and environmentally sustainable way.
A healthy place	Helping our residents to live longer and healthier lives, improving life chances and opportunities to thrive.
Safe and resilient communities	Creating a safer environment, where residents can live more independent lives.
Delivering best value	Changing how we operate, to deliver the best outcomes for residents and businesses.

- 4.16 The underpinning initiatives and workplans which enable effective delivery of the Council Plan 2024-27 ambitions and measures of success, and the proposed performance and governance arrangements, were approved at a meeting of the Executive on 10 April 2024, and together they demonstrate a robust approach to the delivery of key priority activities across Council services.

Council Plan 2024-27: outcomes

- 4.17 Progress of delivery of the Council Plan 2024-27 is monitored via detailed milestone plans which support each initiative under the four priorities and link to success measures determining the impact upon:
- the types of businesses being established in Middlesbrough, to ensure that we attract those which will give residents access to well-paid and rewarding careers,
 - healthy life expectancy of residents of Middlesbrough, who currently experience ill-health much earlier than wealthy areas across the UK,
 - community safety, as part of our plans to reduce crime and make residents and communities feel safer,
 - progress against the Council's governance improvement journey, to provide assurance to members of the public and our partners that the services we are providing are value for money.
- 4.18 Performance management and monitoring of the Council Plan adheres to the corporate programme and project management framework where applicable and is reported to all senior managers and Members as part of this quarterly corporate

performance results report, presented to Executive for noting and decision, where applicable.

- 4.19 Performance overall against the Council Plan 2024-27 outcome measures at Quarter Two 2025/26 is reported as 8 of 40 (20%) either of an improving or static trend, against the 90% performance standard, detailed in the table below:

Outcome Status	Q2 2025/26	Q1 2025/26	Expected standard	Standard achieved	Trend
Number (%age) GREEN	8/40 (20%)	8/40 (20%)	90%	No	↔
Number (%age) AMBER	2/40 (5%)	0/40 (0%)	N/A	N/A	↑
Number (%age) RED	30/40 (75%)	32/40 (80%)	N/A	N/A	↓

- 4.20 It should be noted that trends fluctuate throughout the year, influenced by a range of factors such as seasonal variations and a time lag in published data sets being updated. The expectation is that, over time and the duration of the Council Plan, 90% of the outcome measures will be achieved, as these are outcome measures predicted over the period of the Council Plan 2024-27.
- 4.21 Current and previous outcome measures have generally focused on existing published data sets which, whilst they provide consistency and regional and national comparators, meaningful localised data and insights would be more impactful.
- 4.22 A level of strategic cohesion and planning is required to ensure delivery of all Council activity, contributes towards effective and successful delivery of the Council Plan priorities through articulation of what it is we want to achieve / impact / change (the outcomes) and how we then deliver that change (through an enabling strategy) for each Priority. Those outcomes then drive our direction and intention as a Council.
- 4.23 Outcome measures for the next iteration of the Council Plan are being developed throughout Quarter Three 2025/26 and will be derived through collaboration with services, to understand the impactful work that we as an authority have influence over in shaping and affecting.

Council Plan 2024-27: workplan

- 4.24 At Quarter Two 2025/26, performance against the Council Plan workplan is above the corporate standard of 90%, with 97% of all initiatives on target to be achieved in full, within approved timescales, with further detail provided at Appendix 2.

Status	Q2 2025/26 position	Q1 2025/26 position	Expected standard	Standard achieved	Trend
COMPLETED	50% (28/56)	36% (20/56)	90%	Yes	↑
GREEN	46% (26/56)	50% (28/56)			
AMBER	0% (0/56)	0% (0/56)	n/a	n/a	↔
RED	4% (2/56)	14% (8/56)	n/a	n/a	↑

4.25 There are two Council Plan initiatives reporting as off-track at Quarter Two 2025/26, summarised below:

- *Increase the level of grant income to support the development of new service initiatives*, is delayed from 01/06/2025 to 30/09/2025 and a further delay to 31/03/2026 due to timescales associated with recruiting to a Grants Officer post to support this initiative, impacting delivery timescales.
- *Develop a Community Capacity Building Strategy with focus on social capital and community wealth building* is delayed from 31/08/2025 to 31/01/2026, due to the strategy requiring further revision to align with NHS new 10-year plan and Local Authority Neighbourhood structures.

4.26 There are four proposed amendments to Council Plan workplan actions presented for approval at Quarter Two 2025/26 as detailed at Appendix 3. It is assumed that the remainder of Council Plan workplan actions will be achieved within originally approved timescales and a further update on progress against plans will be provided at Quarter Three 2025/26.

Strategic Risk Register (SRR)

4.27 The Strategic Risk Register (SRR) sets out the key risks which, if they occurred, could stop the Council achieving its objectives as set out in the Council Plan.

4.28 The Register also sets out control measures in place to reduce the impact and / or likelihood of a risk occurring, as well as further planned actions to manage the risk. Risks in the SRR are identified and managed by the Council's LMT in line with the Risk and Opportunity Management Policy, agreed by Executive in 2023. Progress in managing these risks is reported to the LMT monthly, with a full review of the SRR conducted on a quarterly basis.

4.29 The more volatile the risk, the more closely it must be monitored and managed. Managers are responsible for identifying and recording the countermeasures / actions required to address risks and opportunities and maintaining those details within the Council's risk management solution. Countermeasures to risk will include actions to terminate, transfer, treat or tolerate the risk. Actions in relation to opportunity will include exploitation (fully or partially) or avoidance.

4.30 The SRR contains 15 risks at the end of Quarter Two 2025/26. Risks within the SRR are scored three times, using the following table: the first score assesses the likelihood and impact of the risk occurring without any control measures in place; the second assesses the impact of the control measures currently in place; and the third sets a target for the management of the risk.

Almost Certain >80%	5	Low (5)	Medium (10)	High (15)	High (25)	High (35)
Likely 51% - 80%	4	Low (4)	Medium (8)	High (12)	High (20)	High (28)
Possible 21% - 50%	3	Low (3)	Medium (6)	Medium (9)	High (15)	High (21)
Unlikely 6- 20%	2	Low (2)	Low (4)	Medium (6)	Medium (10)	High (14)
Rare <6%	1	Low (1)	Low (2)	Low (3)	Low (5)	Medium (7)
		1 Insignificant	2 Minor	3 Moderate	5 Major	7 Extreme

Directorate Risk Registers

4.31 The SRR has a supporting suite of Directorate Risk Registers. The Council's Leadership team agrees escalations and de-escalations of risk. In addition, Directorate management teams review their risks monthly. This and other measures ensure the Council has a grip on its risk management approach.

4.32 Below is a summary position of actions taken at Directorate level during Quarter Two 2025/26, to manage risks:

Directorate Risk Register	Regeneration	Adults	Public Health	Children's Services	Environment	Finance	Legal and Governance Services
New Risks	0	0	0	3	0	1	4
New Actions	0	0	0	31	9	0	22
New Assessments	3	2	2	1	4	1	7
Deactivated Risks	0	0	2	0	0	1	1

Progress in delivering Programmes and Projects

4.33 The Council maintains a portfolio of corporate and transformation programmes and projects in support of achievement of the Council's strategic priorities.

4.34 The 'Approach to Transformation of Middlesbrough Council' report to full Council on 27 March 2024 outlined the contents of the Transformation Portfolio, which was structured around six themed programmes.

- 4.35 A further report on *'Resetting the Council's approach to Transformation and Delivery of the Council Plan'* was approved at Executive on 30 April 2025, reducing the strategic programmes from six to four; Customer, Neighbourhood, Housing and Digital which now forms the Council's Transformation Programme.
- 4.36 This will ensure the transformation portfolio is focused on delivering true transformational change, through new approaches to service delivery design, driving improved efficiencies and the implementation of effective demand management.
- 4.37 Savings initiatives are now being managed separately to ensure governance arrangements are pragmatic and proportionate.
- 4.38 Projects have been reviewed and incorporated into the Council's overarching portfolio of corporate programmes and projects and are categorised as either transformation or corporate, with progress against performance reported accordingly.
- 4.39 New monthly Directorate and Corporate Performance Boards have been established to replace the previous Thematic Programme and Corporate Transformation Boards and include monitoring the performance of progress against the delivery of all strategic programmes and projects, Executive actions and Council Plan workplan initiatives.
- 4.40 To ensure the success of the established governance framework and Board structure, key roles and responsibilities have been designated at each layer, with the Executive being the ultimate accountable body for successful delivery of the transformation portfolio in its entirety.
- 4.41 An Executive-approved governance structure ensures that projects and programmes are overseen, assured and monitored against the approved Programme and Project Management Framework in a consistent and effective way, with exceptions escalated to senior responsible officers to ensure action is taken to bring the portfolio, programmes and projects back on-track, where required and / or necessary.
- 4.42 At Quarter Two 2025/26, 79% of the total of both corporate and transformation projects within the overarching portfolio are on-track to deliver against project time, cost, scope, and benefits, which is below the expected combined standard of 90%.

Status	Q2 2025/26 position	Q1 2025/26 position	Expected standard	Standard achieved	Trend
GREEN	70% (30/43)	100% (17 / 17)	90%	No	↓
AMBER	9% (4/43)	0% (0 / 17)			
RED	21% (9/43)	0% (0 / 17)	N/A	N/A	↑

Corporate projects progress and performance

4.43 At Quarter Two 2025/26, 81% of corporate projects are on-track to deliver against project time, cost, scope, and benefits, which is below the expected combined standard of 90%.

Status	Q2 2025/26 position	Q1 2025/26 position	Expected standard	Standard achieved	Trend
GREEN	73% (27/37)	100% (17 / 17)	90%	No	↓
AMBER	8% (3/37)	0% (0 / 17)			
RED	19% (7/37)	0% (0 / 17)	N/A	N/A	↑

4.44 A further breakdown of the RAG status of corporate projects by Directorate is summarised as follows:

RAG definition	Adults		Children's		Environment		Legal and Governance		Finance		Regeneration		Portfolio total no. projects	Portfolio total % projects
	No. of projects	% of projects	No. of projects	% of projects	No. of projects	% of projects	No. of projects	% of projects	No. of projects	% of projects	No. of projects	% of projects		
Project on-track against time, scope, cost and benefit, with assured plans in place.	0	0%	3	36%	9	90%	1	100%	1	33%	13	93%	27	73%
Some risk to project time, scope, cost and benefit, with mitigation in place, or in development.	0	0%	2	25%	0	0%	0	0%	0	0%	1	7%	3	8%
High risk to project time, scope, cost and benefit, with limited scope for mitigation.	1	100%	3	38%	1	10%	0	0%	2	67%	0	0%	7	19%
Portfolio totals as no. and %	1	3%	8	21%	10	27%	1	3%	3	8%	14	38%	37	100%

Transformation projects progress and performance

4.45 At Quarter Two 2025/26, 67% of transformation projects, are on-track to deliver against the approved project timescales, costs to deliver, scope and remit, and financial and non-financial benefits, which is below the expected combined standard of 90%.

Status	Q2 2025/26 position	Q1 2025/26 position	Expected standard	Standard achieved	Trend
GREEN	50% (3/6)	N/A	90%	No	N/A
AMBER	17% (1/6)	N/A			
RED	33% (2/6)	N/A	N/A	N/A	N/A

4.46 A further breakdown of the RAG status of projects by transformation programme is summarised as follows:

RAG definition	Customer		Neighbourhood		Digital		Housing		Portfolio total no. projects	Portfolio total % projects
	No. of projects	% of projects	No. of projects	% of projects	No. of projects	% of projects	No. of projects	% of projects		
Project on-track against time, scope, cost and benefit, with assured plans in place.	2	67%	0	0%	1	50%	0	0%	3	50%
Some risk to project time, scope, cost and benefit, with mitigation in place, or in development.	1	33%	0	0%	0	0%	0	0%	1	17%
High risk to project time, scope, cost and benefit, with limited scope for mitigation.	0	0%	0	0%	1	50%	1	100%	2	33%
Portfolio totals as no. and %	3	50%	0	0%	2	33%	1	17%	6	100%

4.47 To date the focus on transformation has been two-fold; to deliver essential savings and achieve change. Moving forward and as part of the refresh of Council Plan workplan and outcomes and detailed in a report to the December Executive entitled *Council Plan 2026/27-29: Outcomes Refresh*, there will be a stronger focus on the outcomes to be delivered, which represent measurable results or impacts of contributing initiatives and activities.

4.48 Becoming outcome-focused ensures that everything the organisation does is directed towards making a measurable and lasting difference for residents, communities and businesses. An outcome-based approach provides a clear line of sight between strategic priorities, service delivery, and the changes we aim to achieve across the town. It allows us to set clear goals, measure progress and make evidence-based decisions about where to target resources and for the greater benefit. This approach supports effective performance management and continuous improvement, ensuring value for money, as well as meeting the needs of its communities.

4.49 To that end, in changing the metrics that we measure, we will change the focus of our transformation journey to something more sustainable and impactful, continuous improvement. Continuous improvement, will see the Council become more efficient,

focusing on long term projects to improve outcomes for both residents and bring about town-level change.

Project gateway approvals

4.50 Project gateway approvals are required throughout the life of a project to ensure appropriate and robust assurance and challenge has been applied to the scoping, planning, development and delivery of the necessary project documentation and delivery plans, which are monitored through the recently introduced Directorate and Corporate Performance Boards.

4.51 Delegated decision-making powers relating to proposed changes to the approved time, scope, cost and benefit of individual programmes and projects are in place, enabling those that are off-track to be brought back within agreed tolerances, as set out in the Programme and Project Management Framework (PPMF). This is with the exception of any key changes or urgent decisions that require Executive approval, which require an additional report.

4.52 In Quarter Two 2025/26, there were six project gateway approvals as summarised below:

Directorate / Programme	Project name	Gateway type	Approved
Adult Social Care	Temporary Accommodation and Support Review	Project Closure Report	Jul
Adult Social Care	Strength-based Practice	Project Closure Report	
Legal and Governance	Review of MBC Customer Relationship Manager (CRM) and Content Management System (CMS)	Project Closure Report	Aug
Legal and Governance	SharePoint	Change Control	Sep
Regeneration	Hemlington Grange West	Change Control	
Customer Programme	MBC Customer Access to Services and Single View of the Customer	Project Brief	

Progress in other corporate performance matters

Status	Q2 2025/26 position	Q1 2025/26 position	Expected standard	Standard achieved	Trend
P 1 / 2 audit actions in time	78%	73%	90%	No	↑
FOI / EIR responded to <20 days	61%	68%	90%	No	↓
% live SARs overdue	20%	16%	90%	No	↑
Information security incidents	30	27	N/A	N/A	↑
Incidents reported to the ICO	0	1	N/A	N/A	↓
% complaints closed in time	74%	80%	90%	No	↓

4.53 In addition to the above performance and risk issues, the Leadership and Management Team now review a range of other performance measures on a quarterly basis, including compliance with agreed actions from internal audits, responsiveness to statutory information requests, information security incidents and complaints.

4.54 At the end of Quarter Two 2025/26, the key points of note in matters of compliance, are:

- Five Priority Two actions from the Domestic Abuse audit of Adult Social Care and Children's Services were not completed within the expected timescales. A new lead has now been assigned to ensure these actions are delivered. Additionally, one further Priority Two action, related to the Declarations of Interests and Members' Allowances audit, became overdue on 30/09/2025 though supporting evidence has since been submitted to Veritau. All remaining actions were completed within 14 days of their due dates.
- There has been a slight decline in compliance with statutory timescales for FOI and EIR requests. Capacity challenges within services continue to be a key contributing factor to this ongoing issue. The new system, previously referenced in the Quarter Four 2024/25 report, is scheduled to go live during Quarter Three 2025/26. It is expected that the enhanced functionality and streamlined processes introduced by the system will support services in improving response times and overall compliance.
- Compliance with the legal timescales in relation to Subject Access Requests (SARs) continues to relate to a very small number of complex SARs. Capacity within the central team has now increased, this will support improving the compliance in this area.

5. Ward Member Engagement if relevant and appropriate

5.1 Not applicable.

6. Other potential alternative(s) and why these have not been recommended

6.1 The Council is required to operate a performance management framework in order to ensure delivery of its best value duty; to not do so would place the council at risk of failing in its statutory responsibility in this regard.

7. Impact(s) of the recommended decision(s)

Topic	Impact
Financial (including procurement and Social Value)	There are no direct financial implications rising from the recommendations set out in this report.
Legal	There are no legal impacts of the proposed decisions or recommendations, and they are consistent with and will promote the achievement of the Council's legal duty to achieve Best Value.
Risk	The proposed recommendations are key to and consistent with supporting delivery of the Council's strategic priorities and risks, as set out in the Council Plan.
Human Rights, Public Sector Equality Duty and Community Cohesion	The ambitions of the Council Plan set out how the Council will improve outcomes for all its residents and highlight where additional activity is required to address inequalities in outcomes that exist across groups and individuals. This approach was impact assessed as part of the development of the 2024-2027 Council Plan, which found that the plan would have a positive impact by addressing inequalities.
Reducing Poverty	The ambitions of the Council Plan set out how the Council will work with partners to support our residents out of poverty and improve community resilience to prevent people falling into poverty. Meeting this challenge is central to all of the ambitions within the Council Plan.
Climate Change / Environmental	The ambitions of the Council Plan set out how the Council will protect and improve our environment, as part of the "A healthy place" priority which focuses on improving levels of recycling, protecting and improving parks and open spaces, and improving environment standards of the town. There are no direct impacts on this theme as a result of this and performance to date is reflected in Appendix 2: Council Plan workplan; progress at Quarter Two 2025/26. Where impact on climate change and environment is considered as part of wider programmes, projects or Executive reports, these will be referenced within the detail of the report
Children and Young People Cared for by the Authority and Care Leavers	The ambitions of the Council Plan set out how the Council will respond and react to Children and Young People cared for by the authority and care leavers, across the "A successful and ambitious town", "A healthy place," and "Safe and Resilient Communities" priorities. There are no direct impacts on this theme as a result of this and performance to date is reflected in Appendix 2: Council Plan workplan; progress at Quarter Two 2025/26. Where impact on Children and Young People cared for by the authority and care leavers is considered as part of wider programmes, projects or Executive reports, these will be referenced within the detail of the report.
Data Protection	Whenever the council delivers activities and uses data to assess impact, it takes the necessary steps to ensure it complies with the requirements of GDPR in any use of personal data that is undertaken within that work.

Actions to be taken to implement the recommended decision(s)

Action	Responsible Officer	Deadline
Performance management feeder systems to be updated according to approval from Executive.	J Chapman	19 December 2025

Appendices

1	Executive actions proposed amendments at Quarter Two 2025/26
2	Council Plan workplan progress at Quarter Two 2025/26
3	Council Plan Workplan; proposed amendments at Quarter Two 2025/26
4	Strategic Risk register progress at Quarter Two 2025/26

Background papers

Body	Report title	Date
Council	The Council Plan 2024-27	08/03/2024
Council	Approach to Transformation of Middlesbrough Council	27/03/2024
Council	Transformation of Middlesbrough Council	24/04/2024
Executive	Quarter One 2024/25 Corporate Performance Report	04/09/2024
Executive	Quarter Two 2024/25 Corporate Performance Report	04/12/2024
Executive	Quarter Three 2024/25 Corporate Performance Report	05/03/2025
Executive	Middlesbrough Priorities Fund	30/04/2025
Executive	Middlesbrough Priorities Fund	16/07/2025
Executive	Quarter Four and Year End 2024/25 Corporate Performance Report	11/06/2025
Executive	Quarter One 2025/26 Corporate Performance Report	03/09/2024

Contact: Gemma Cooper, Head of Strategy, Business and Customer

Email: gemma_cooper@middlesbrough.gov.uk

Appendix 1: Executive actions proposed amendments at Quarter Two 2025/26

Executive of	Report	Action	Owner	Original Due date	Current Due Date	Proposed Revised Due Date
13/11/2024	Middlesbrough Council; Target Operating Model	Map out next steps at the Target Operating Model Thematic Board.	LGS	31/03/2025	30/09/2025	31/12/2025
30/04/2025	Resetting the Council's Approach to Transformation and Delivery of the Council Plan	Establish Continuous Improvement Team	FIN	30/06/2025	30/06/2025	31/03/2026
30/09/2025	SHiFT Programme Progress Update	Further update required on progress	CS	30/09/2025	30/09/2025	31/12/2025
31/10/2025	Residential and Supported Accommodation for Children in Our Care and Care Leavers Update	After 6 months we will provide an updated position Executive Director of Children's Services 6 months on the new approach strategy and its impact.	CS	31/10/2025	31/10/2025	31/12/2025
24/07/2025	Disposal of land at Hemlington Grange West	POS and Land Appropriation	REG	30/08/2024	30/09/2025	30/11/2025
24/07/2025	Disposal of land at Hemlington Grange West	Development Guidance	REG	25/12/2024	31/12/2025	22/02/2026
24/07/2025	Disposal of land at Hemlington Grange West	Outline Planning	REG	03/04/2025	30/09/2025	31/05/2026
24/07/2025	Disposal of land at Hemlington Grange West	Market the Site	REG	01/08/2025	01/08/2025	05/06/2025
24/07/2025	Disposal of land at Hemlington Grange West	Executive Approval to dispose	REG	29/09/2025	29/09/2025	22/09/2026
24/07/2025	Disposal of land at Hemlington Grange West	Exchange contracts with Developer	REG	02/01/2026	02/01/2026	31/12/2026
24/07/2025	Disposal of land at Hemlington Grange West	Legally Complete	REG	16/08/2026	16/08/2026	14/07/2027
24/07/2025	Disposal of land at Hemlington Grange West	Developer starts on site	REG	19/09/2026	19/09/2026	17/09/2027
24/07/2025	Disposal of land at Hemlington Grange West	First completions	REG	14/09/2027	14/09/2027	11/09/2028
04/12/2024	Housing Supply	Refurb works completed Tranche 1	REG	31/08/2025	31/08/2025	31/12/2025
30/04/2025	Environment Scrutiny Panel - Waste Management - Action Plan	To be included in the Waste policy in relation to the positioning and placement of the bins and what provision new developments need to arrange.	ECS	31/07/2025	31/07/2025	28/02/2026

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Appendix 2: Council Plan workplan progress at Quarter Two 2025/26

We will attract and grow businesses to increase employment opportunities	Q1 2025/26 position	Q2 2025/26 position
Implementation of an Economic Growth Strategy and Masterplan for the town, articulating both the aspirations of the Council and key partners and the key future investment priorities.	G	G
Expand the towns cultural offer through creation of a Cultural Masterplan, alongside exploration of external investment to ensure long term sustainability.	G	G
Increase the local economic impact of new job creation in key sectors.	R	G
Improve the range of health and employment related services offered to the public through successful delivery of the Levelling Up Partnership funds.	G	G

We will improve attainment in education and skills	Q1 2025/26 position	Q2 2025/26 position
Transform Middlesbrough's approach to delivery of learning through implementation of the Council's Education and Skills Strategy.	G	G
Improve outcomes through delivery of the Priority Education Area action plan at key stages 1, 2 and 4.	C	C
Increase parental understanding of the importance of literacy for under 5's through a programme of learning	G	C
Improve life chances by increasing children's and young people's access to high quality education through delivery of the Learning and Education Strategy.	G	C
Develop and deliver a programme of qualifications and learning to support people into / back into employment through Middlesbrough Community Learning.	G	G

We will ensure housing provision meets local demands	Q1 2025/26 position	Q2 2025/26 position
Develop and progress a new Local Plan for Middlesbrough which balances growth aspirations with the longer-term needs of the Middlesbrough community.	G	G
Continue to grow housing sites and opportunities in Middlesbrough, to enable the development of 450 units of new housing per year.	G	G
Establish a strategic leadership role for the provision of housing to ensure that the provision aligns with needs.	C	C
Increase pathways offer for homeless households that embody choice; safety and dignity and provide routes into sustainable, long-term accommodation.	R	G

We will improve life chances of our residents by responding to health inequalities	Q1 2025/26 position	Q2 2025/26 position
Boost recruitment and retention of practitioners through delivery of the childcare expansion in Early Years	C	C
Roll-out the extended childcare entitlement to increased number of children from 9months+, who have access to Early Years provision	C	C
Increase outcomes for under 5's through successful delivery of the Best Start Pathway.	G	C

Develop research architecture and attract funding, to support development of our local understanding of key issues affecting health inequalities.	G	G
Reduce health inequalities caused by excess weight, through implementation of the core Healthy Weight Declaration commitments.	C	C
Improve wellbeing in Middlesbrough through embedding a 'health in all' policies approach in all planning and transport decision-making.	G	C
Improve health literacy through delivery of a Healthy Start pilot model for prevention of ill-health in schools.	R	G
Reduce inequalities through improvements to cancer screening programmes uptake	G	G
Improve prevention services delivered in primary and secondary care to increase uptake	G	G

We will protect and improve our environment	Q1 2025/26 position	Q2 2025/26 position
Increase the levels of recycling in Middlesbrough from 30% to 38%.	G	G
Protect and improve our parks and open spaces through retention of Green Flag Status	G	G
Improve environmental standards of the town, through increased levels of environmental enforcement.	C	C

We will promote inclusivity for all	Q1 2025/26 position	Q2 2025/26 position
Strengthen our approach to supporting dementia friendly communities programme through increasing voluntary and community sector capacity	C	C
Prevent and / or delay the need for formal service provision through improved access to reliable and timely advice and information, to support independent and healthy living	R	G
Develop and implement a pilot approach to housing and support, for inclusion health groups ensure this is reflected in the Supported Housing Strategy	C	C

We will reduce poverty	Q1 2025/26 position	Q2 2025/26 position
Relaunch Welfare Strategy to support Middlesbrough's vulnerable residents who need financial assistance, advice and support	C	C

We will provide support for adults to be independent for longer	Q1 2025/26 position	Q2 2025/26 position
Increase the effectiveness of prevention through the development of more signposting and a consistent strengths-based approach to the promotion of independence at the "front door" of Adult Social Care	R	G
Increase the amount of reablement provided to reduce the need for on-going care	G	C
Develop an enhanced range of accommodation and support options for adults with a learning disability to promote independence and reduce the reliance on residential care provision	G	G

Reduce the need for on-going care through the expanded use of the Connect Service, assistive technology and digital solutions	G	C
Re-locate and expand our specialist autism Day Care service	G	C
Develop a Community Capacity Building Strategy with focus on social capital and community wealth building	G	R

We will Improve transport and digital connectivity	Q1 2025/26 position	Q2 2025/26 position
Implementation of a transformed customer model to achieve improved customer access, outcomes and savings	G	G
Improve public highways and infrastructure to support connectivity across Middlesbrough and the Tees Valley	G	G

We will promote new ideas and community initiatives	Q1 2025/26 position	Q2 2025/26 position
Introduce a neighbourhood working model to ensure Council services are more closely aligned to community needs	C	C

We will reduce crime and antisocial behaviour	Q1 2025/26 position	Q2 2025/26 position
Reduce Crime and Anti-Social behaviours across Middlesbrough through the continued working with the Community Safety Partnership	G	C
Improve the safety and health of the public and the environments in which they live and work through review of public protection policies and interventions	G	G
Implement a multidisciplinary approach (SHIFT) to increase prevention opportunities through early intervention	C	C
Work with partners to ensure safe and effective systems and processes are in place for the protection of victims of domestic abuse and their children	R	G

We will ensure robust and effective corporate governance	Q1 2025/26 position	Q2 2025/26 position
Implement and embed a Member Development Strategy and Programme to extend learning and development opportunities	G	G
Develop and implement approach to achieve organisational change through implementation of transformation portfolio of programme and projects and associated governance structure	C	C
Refresh the Information Strategy to ensure legal compliance in regard to information governance	C	C

We will set a balanced revenue budget and Medium-Term Financial Plan to restore financial resilience and sustainability	Q1 2025/26 position	Q2 2025/26 position
Increase internal residential capacity through the purchase of suitable properties	G	G
Improve recruitment and retention of social worker related posts through more targeted and effective marketing	G	C
Maximise grant opportunities to support service delivery	C	C
Implementation of a People Strategy to underpin the Council's cultural transformation ambitions and financial stability	C	C
Increase sales and maximise rental income of the Council's asset portfolio to ensure financial sustainability and promote economic growth	G	G
Remodel the Council's Planning Service to reflect increasing demand and complexity, address recruitment and retention difficulties, and deliver improved customer service	G	C
Complete new delivery model for Procurement and Contract Management across Council services	R	G
Increase level of grant income to support development of new service delivery initiatives	R	R
Retender pensions administration service, to ensure value for money for fund and scheme members	C	C
Implementation and review effectiveness of demand and cost modelling forecast, for high-spend areas to feed into MTFP assumptions	C	C
Review of Children's and Young People placements, including processes and procedures to ensure robust decision-making and allocation	C	C

Key:	
C	Complete
G	On-track
A	Some slippage
R	High risk of deliverability
U	Undeliverable

Appendix 3: Council Plan Workplan; proposed amendments at Quarter Two 2025/26

Initiative	Owner	Original Due Date	Current Due Date	Reason for (R) / Impact (I) of delay	Proposed Due Date
CP-PH-09 Develop a Community Capacity Building Strategy with focus on social capital and community wealth building	FIN	31/08/2025	31/08/2025	(R) The strategy requires further revision to align with NHS new 10 year plan and Local Authority Neighbourhood structures. (I) No impact other than timescales	31/01/2026
CP-FIN-02 Increase the level of grant income to support the development of new service initiatives	FIN	31/03/2025	30/06/2025	(R) There was a delay in recruiting to the Grants Officer post to support this initiative which has impacted upon delivery timescales. (I) No known adverse impact. A 2025/26 year-end report on grant activity will be produced.	31/03/2026
CP-ASC-08 Work with partners to ensure safe and effective systems and processes are in place for the protection of victims of domestic abuse and their children	ASC	31/03/2025	31/10/2025	(R): Delay due to awaiting feedback from the Domestic Abuse Partnership to inform the Domestic Abuse Strategy 2025-2025 (scheduled to go to Executive for approval November). (I): 3mth delay to delivery of strategy	31/01/2026
CP-REG-01 Implementation of an Economic Growth Strategy and Masterplan for the Town, articulating both the aspirations of the Council and key partners and the key future investment priorities	REG	31/03/2026	31/03/2026	(R): Delay due to change in approach to ensure strategy is co-designed with key external stakeholders. (I): 2mth delay to delivery of strategy	31/05/2026

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Appendix 4: Strategic Risk register progress at Quarter Two 2025/26

Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-01	Failure to Maintain a balanced budget and MTFP	Failure to set a legal and balanced annual budget and to maintain a sustainable Medium Term Financial Plan (MTFP) The Council is required to set a legally balanced revenue budget by 11 March in advance of each forthcoming financial year. Failure to achieve this objective will require the s151 Officer to issue a statutory s114 Notice to the Council. The Council has a best value duty to set and maintain a sustainable and balanced Medium Term Financial Plan including maintenance of its reserves position to demonstrate financial resilience to be able to respond to unforeseen and complex financial challenges presented by the wider economic environment.	35	21	21	Director of Finance and Transformation
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date
- Responsibility and Accountability for Financial Management reinforced by Accountability Agreements for all Directors - Monthly budget monitoring, forecasting, and tracking of savings delivery by Directors with accountability to the Interim CEO through LMT and development and delivery of financial recovery plans to control within approved budget - Monthly budget challenge sessions chaired by Director of Finance for all Directorates to enable development of insight, understanding and wider collaboration of colleagues in order to address significant financial risks. - Timely briefing of Mayor and Executive Members on significant financial challenges with agreement for action. - Quarterly budget challenge sessions chaired by the Executive Member for Finance & Governance to engage Executive Members.			Development of balanced 2024/25 Budget and MTFP to 2026/27	Director of Finance and Transformation	Director of Finance and Transformation; Chief Executive	11-Mar-2024
			Refresh of the 2025-26 MTFP process	Andrew Humble		28-Jul-2024
			Failure of the Recover, Reset, Deliver Transformation Portfolio	Chief Executive		31-Mar-2025
			Failure of the Recover, Reset, Deliver Transformation Portfolio to identify further savings	Chief Executive		31-Mar-2026
			Monthly budget monitoring to be put in place	Director of Adult Social Care and Health Integration; Director of Children's Care; Director of Children's Services		31-Mar-2024
			MOU surrounding agency costs as a region to be implemented.	Director of Children's Care		30-May-2025

- Monthly monitoring of income budgets, council tax and business rates collection rates and debt levels. - Update MTFP ahead of Council Planning and budget setting process for 2024/25. - Implementation of budget management Power BI dashboard over Business World financial management system in order to improve accessibility of financial information for Directors, Heads of Service and Budget Manager. - Implementation and expansion of purchase to pay compliance dashboards for use by Directors, Heads of Service and Budget Managers to drive increase in compliant procurement in relation to retrospective ordering, on vs off contract spend and use of purchase cards	Monthly budget monitoring to be put in place	Director of Adult Social Care and Health Integration; Director of Children's Care	✓	31-Mar-2024
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Code	Risk Description		Original Score	Current Score	Target Score	Managed By
Page 60 60-02	Volatility in the demand, complexity and cost of children's social care.	The risk that demand and cost of and children's social care continues to escalate on the scale experienced in 2024/25, is the single biggest risk to the Councils financial viability. More financially sustainable solutions for meeting social care needs of children need to be secured with urgency to ensure delivery within the approved budget for 2025/26.	 35	 28	 21	Director of Children's Care; Director of Children's Services; Chief Executive
Current Mitigation		Future Mitigation	Responsible Officer		Director	Target Date
Children's input - Weekly activity data through Chat reports/ data - Monthly financial monitoring with Finance BP - Development of demand model - Placement review has taken place to manage costs associated with young people. - MOU surrounding agency costs as a region to be implemented in April 2025. - Recruitment and retention strategy reviewed to increase permanent staff within the local authority. - Transformation of Children's Services underway. - Access to grants being followed up.		Weekly placements panel to be put place for high cost placements	Director of Adult Social Care and Health Integration; Director of Children's Care	✓	Director of Children's Care; Director of Children's Services; Director of Education and Partnerships	30-Jun-2023
		Review Placements Manager post	Claire Walker	✓		29-Feb-2024
		Monthly budget monitoring to be put in place	Director of Adult Social Care and Health Integration; Director of Children's Care; Director of Children's Services	✓		31-Mar-2024
		MOU surrounding agency costs as a region to be implemented.	Director of Children's Care	✓		30-May-2025

Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-03	Volatility in the demand and cost of adult's social care	The potential for underlying demand and cost pressures to arise in adult social care presents a significant risk to the Council's overall financial viability and measures must be put in place to manage within approved budget.	 35	 10	 9	Director of Adult Social Care and Health Integration
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date
Local Government settlement Budget Management process Contract management processes Savings programme in place Demand model in place Monthly demand reported to DMT - activity not just finance			Monthly budget monitoring to be put in place	Director of Adult Social Care and Health Integration; Director of Children's Care 	Director of Adult Social Care and Health Integration; Adult Social Care and Public Health Senior Managers ; Chief Executive	31-Mar-2024
			Develop a demand model, which monitors performance across activity demand and unit costing, to understand 'current state.'	Director of Adult Social Care and Health Integration; Dee Evans; Victoria Holmes 		31-Mar-2026
			Develop a forecast model, which uses the 'current state' model, to predict activity demand and financials across Adults Social Care in the next 1/2/5 years.	Dee Evans; Victoria Holmes 		31-Mar-2026
Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-04	Unlawful decision by the Council	If the Council took a decision that was unlawful then there is a risk of legal challenge or regulatory action that could damage its reputation and its financial position.	 35	 10	 6	Director of Legal and Governance
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date
Council constitution and supporting policy framework Corporate policies and procedures Compliance checks across key areas including HSE, Risk etc, covering the corporate governance framework Standard report formats Statutory officer posts to oversee governance Annual Governance Statement assessment process Internal and external audit processes Refreshed whistleblowing policy Legal and finance report clearance process Regular review of the Council Constitution.			Refresh the committee report format	Ann-Marie Johnstone 	Director of Legal and Governance; Chief Executive	31-Jul-2023
			Review the report development process	Ann-Marie Johnstone 		31-Jul-2023
			Complete delivery of the Corporate Governance Improvement Plan	Ann-Marie Johnstone 		31-Mar-2025
			Progress report on improvement against the Best Value Notice by the independent Board considered by Council	Ann-Marie Johnstone 		31-Mar-2024

	Progress report on improvement against BV notice considered by Executive	Ann-Marie Johnstone			30-Sep-2024
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Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-05	Serious accident or death occurred as a result of failure to comply with Health and safety legislation and regulations	If a serious accident or death occurred as a result of failure to comply with Health and safety legislation and regulations then this could result in financial and reputational damage and individual prosecutions of staff.	 35	 15	 10	Chief Executive
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date
Comprehensive suite of Health and Safety policies and procedures. Mandatory and complimentary Health and safety training for all Council staff. Dedicated HSE Advisor team Incident investigation system (My Compliance) to learn from incidents. HSE intranet page with important HSE information Audit schedule Service area audit schedule HSE steering group Fire Management System implemented across Council premises.			Fire Safety Management Policy Statement	Director of Regeneration; Gary Welch 	Director of Legal and Governance; Director of Regeneration; Chief Executive	31-Jul-2023
			CEO to produce H&S Statement of Intent for the Council.	Chief Executive; Gary Welch 		31-Jul-2023
			Risk from reinforced autoclaved aerated concrete (RAAC) collapsing in maintained schools or other Council assets	Director of Regeneration; Richard Horniman 		31-Mar-2025
			Implementation of service area audits by the health and safety unit to give further assurance of sound HSMS within directorates.	Gary Welch 		31-Mar-2025

Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-07	Unable to recruit and retain key staff	If the Council is unable to recruit and retain key staff , then this could impact on its' ability to deliver critical services which could cause harm to people and could result in government intervention.	 15	 9	 3	Director of Legal and Governance
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date
Benchmarking salaries against other local authorities and similar roles in other disciplines to remain competitive. Work/life balance system such as agile working, 9 day fortnight, collaboration areas etc. Advertising roles on multiple platforms such as LinkedIn and other social networking sites with the aim of reaching target audience.			Benchmark grades and salaries against NE local authorities	Kerry Rowe 	Director of Legal and Governance; Chief Executive	31-Jul-2023
			Review recruitment process	Nicola Finnegan 		31-Oct-2023
			Create new people and cultural transformation strategy	Nicola Finnegan 		31-Oct-2023
			review the people strategy after the first year of implementation	Nicola Finnegan 		30-Apr-2025
			Recruitment of Chief Executive and S151 Officer	Director of Legal and Governance 		31-Mar-2025
			Track delivery of first quarterly report to LMT on delivery against People Strategy	Nicola Finnegan 		31-Jul-2024
			Recruit a suitable Director of Children's Services or Interim Director of Children's Services	Nicola Finnegan 		31-Aug-2025

Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-08	Fail to ensure an approach to cyber security that meets good practice standards as set out by the National Cyber Security Centre and other bodies	If the Council fails to ensure a sound approach to cyber security (technology, processes and awareness), then this could result in a cyber-attack which disrupts service delivery, increases risks to service users and incurs significant financial costs to respond to and recover from an attack.	 35	 14	 10	Director of Legal and Governance; Lynsey Zipfell
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date

• Annual ICT health checks (Internal and external penetration testing). • Compliance with PSN and PCI standards. • Internal scanning as new systems go live. • Robust defence systems including firewalls, content filtering and endpoint protection. • Robust 60 day patching and maintenance cycle. • Test complete and continue to test. • Health check recommendations reviewed and implemented. • Membership of North East WARP and CiSP. • Use of Protective DNS. • Robust backup regime, including off-line tape backups to ensure recovery. • Cyber Incident Response (CIR) partner and contract in place. • Infrastructure inspections carried out quarterly to minimise disruption to service delivery.			Director of Legal and Governance; Chief Executive	
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Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-09	Corporate Governance arrangement not fit for purpose	If the Council's Corporate Governance arrangements are not fit for purpose and appropriate action is not taken to rectify this at pace , this could result, censure from the Council's auditors within a public interest report that would damage the Council's reputation and/or in government formal intervention including removal of powers from officers and members and direction of council spend.	 15	 10	 9	Director of Legal and Governance
Current Mitigation		Future Mitigation	Responsible Officer		Director	Target Date
External reports commissioned on Corporate governance and findings reflected within a Corporate Governance Improvement Plan Improvement Board in place		Revised the Complaints Procedure	Leanne Hamer	✓	Director of Legal and Governance; Chief Executive	15-Jul-2025
		Community Engagement policy and approach to be developed	Marion Walker	▶		30-Nov-2025

Detailed improvement plan in place that has delivered a range of changes to corporate governance processes Annual Governance Statement process and supporting action plan. Draft AGSs in place for both 2023/24 and 2025/26 Regular reports to Audit Committee on aspects of corporate governance to provide assurance	Ensure the Company is fully liquidated during 2025/26.	Justin Weston			31-Oct-2025
	Review of the Internal Audit function	Director of Finance and Transformation			30-Sep-2025
	Develop the detailed delivery plan	Gemma Cooper			30-Sep-2023
	Progress report from MIIAB to Council by end March 2024	Ann-Marie Johnstone			31-Mar-2024
	Progress report from MIIAB to Executive by end July 2024	Ann-Marie Johnstone			31-Jul-2024
	Continue to implement a scheme of sub-delegations where appropriate to further improve governance around officer delegated decisions.	Director of Legal and Governance			30-Sep-2025
	Seek an LGA Corporate Peer Challenge review within the next two years to provide an external review of the Council's corporate governance arrangements.	Director of Legal and Governance			25-Jan-2025
	Continue to be addressed by the Corporate Governance Improvement Plan and the sec 24 action plan put in place to respond to the statutory recommendations of the EA and the governance weaknesses identified by CIPFA, Government and the Council itself.	Chief Executive			31-Mar-2025
	A robust officer scheme of delegations and sub-delegations is required to ensure effective, appropriate and timely taking of decisions that can be taken by officers. (20/21 action). This will be addressed following the review of the constitution in 2024.	Director of Legal and Governance			30-Sep-2025
	Refresh the Information Strategy during 2024.	Ann-Marie Johnstone			31-Oct-2025
	In 2024/5 the Council will continue to deliver against its improvement plan and move towards BAU practices that provide assurance to government that the Council is maintaining a culture of good governance.	Chief Executive			31-Mar-2025

	Development of a Workforce Plan to ensure staff at all levels have the skills and capabilities to be successful in their roles	Nicola Finnegan	✓		31-Mar-2025
	Complete the first annual review of the People Strategy	Nicola Finnegan	✓		30-Apr-2025
	Complete recruitment process for all interim appointments in a Leadership Management Team position	Nicola Finnegan	✓		31-Mar-2025
	Complete the first annual review of the Member Development Strategy to assess effectiveness and impact on culture and compliance	Ann-Marie Wilson	✓		30-Nov-2024
	Commence reporting annually on how the Audit Committee has complied with CIPFA good practice, discharged its responsibilities, and include an assessment of its performance. The report should be available to the public.	Director of Legal and Governance; Ann-Marie Johnstone	▶		31-Oct-2025
	Review current governance arrangements for Audit Committee and make recommendations in relation to inclusion of co-opted independent members for Committee consideration	Director of Legal and Governance	✓		31-Oct-2025
	The Council will refresh its approach to customers within a revised Customer Services Strategy that will set out how customer services will be delivered within the Council's target operating model developed within the Transformation programme	Janette Savage	✓		14-Feb-2025
	Continually review the Community Engagement policy to ensure it aligns with the wider needs of the organisation that will emerge from the Transformation Programme.	Marion Walker	▶		28-Feb-2026
	Put in place a strategic Partnerships Strategy.	Chief Executive	▶		31-Oct-2025
	Review the process for managing any changes to reports that occur between publication and meetings	Director of Legal and Governance	✓		31-May-2025

	The Council is implementing a Corporate Landlord Model as part of the transformation work. This sets out the framework for property decisions and will be formally considered by Executive prior to full adoption.	David Jamison	✓		30-Nov-2024
	A clear Asset Acquisition Policy reflecting these requirements is integrated into the Corporate Landlord Model framework that will be considered by Executive.	David Velemir	▶		17-Mar-2026
	Continue to implement the Continuous Improvement Plan	Chief Executive	✓		31-Jul-2025
	Refresh the Performance Management Policy and the supporting Performance Management Framework to embed a 'golden thread' of Performance Management from the Council Plan down to departmental level.	Director of Legal and Governance	▶		16-Dec-2025

Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-10	Negative Impact of Mayoral Development Corporation	If the Council's ambitions for town centre regeneration or the wider financial sustainability of the organisation are negatively impacted by the establishment of a Mayoral Development Corporation that would take over some of the Council's existing statutory roles. This could potentially result in a lack of investment in the town, reduction in the Council's business rates income, loss of commercial income and reduction in asset holdings affecting the Council's financial viability. Reputational damage is also possible through the incorrect discharge of responsibilities such as town planning or business rate relief.	 10	 6	 3	Director of Regeneration
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date

Council representation on the board of the MDC Pushing for no detriment clauses in the MDC constitution Engagement with TVCA on the development of future MDC projects	Heads of Terms agreed on individual asset transfers	Director of Regeneration	✓	Director of Regeneration; Chief Executive	31-Jul-2025
	Delivery of planning functions until robust alternative is in place	Director of Regeneration	✓		31-Dec-2023
	Agree robust business rates protocols	Leanne Miller; Janette Savage	✓		31-May-2025

Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-11	Failure to have strategic partnership working.	If the Council does not work with its partners to establish a strategic approach to partnership working based on principles of timely and meaningful collaboration, co-design and with common purpose to inspire and build a team beyond the council that are galvanised to deliver for the town, it is unlikely to achieve delivery of the Council plan ambitions and outcomes for our residents will not improve.	 35	 9	 10	Chief Executive
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date
Partnership governance register in place. Partnership governance annual assurance report and supporting register in place to assess the health of key partnerships. Children's Controls All partnerships contain TOR - Partners contribute. External scrutiny of partnerships. New Mayor to chair Corporate Parenting Board. Formal reporting process in place - record of discussion and decision making. Adults Controls Victim support for those within ASC who require it. Additional resources as required,			Put in place a strategic Partnerships Strategy.	Chief Executive	Chief Executive	31-Oct-2025
			Refresh of the Partnership Governance register	Ann-Marie Johnstone		31-Dec-2023

Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-12	Fail to deliver quality practice within children's safeguarding services	If the Council fail to deliver quality practice within children's safeguarding services, then this may result in further government intervention, serious harm to individuals and loss of financial control.	 35	 15	 10	Director of Children's Care; Director of Children's Services
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date
- Delivered Children's services improvement plan - Monthly performance monitoring boards in place - Review to be undertaken of Children's Care - Monthly audit activity and reports undertaken to consider the quality of practice. - Implementation of children's improvement board April 2025. - Commitment to SHiFT, to improve quality and management of practice. - Ongoing monitoring via OFSTED with an annual conversation to take place. - OFSTED future inspections to continue. - Internal audit to review working practices.			Implementation of post ILACs improvement plan	Director of Adult Social Care and Health Integration; Director of Children's Care 	Director of Children's Care; Director of Children's Services; Chief Executive	31-Jan-2024
			Creation and recruitment to the head of Quality Principal Social Work Learning and Review	Director of Adult Social Care and Health Integration; Director of Children's Care 		30-Sep-2023
			Review progress in delivery of the ILACS improvement plan to assess progress and impact of actions	Director of Adult Social Care and Health Integration; Director of Children's Care; Director of Children's Services 		30-Apr-2024
			Complete delivery of the ILACs improvement	Director of Adult Social Care and Health Integration; Director of Children's Care; Director of Children's Services 		31-Jan-2026

Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-13	Failure to deliver transformation successfully	If the Council fails to transform its service delivery model to a model that can deliver outcomes for residents at a reduced cost base, then the Council's financial position will become untenable and may result in the issuing of a S114 Notice.	 35	 15	 5	Director of Finance and Transformation; Chief Executive
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date
- PPMF in place			Failure of the Recover, Reset, Deliver Transformation Portfolio	Chief Executive 	Chief Executive	31-Mar-2025

- Transformation governance arrangements and reporting cycle agreed - Funding of £4.827m agreed by Council to fund transformation work	Failure of the Recover, Reset, Deliver Transformation Portfolio to identify further savings	Chief Executive			31-Mar-2026
	Agree the content and approach of the transformation portfolio	Chief Executive			30-Apr-2024
	First cycle of Transformation governance arrangements scheduled	Gemma Cooper			30-Apr-2024
	Develop specification for transformation resourcing	Gemma Cooper			30-Apr-2024

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Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-14	Failure to ensure effective governance of the Middlesbrough Development Corporation	If the Middlesbrough Development Corporation fails to reflect the relevant findings from the review of Teesworks governance in its structures, then there is a risk that it could fail to ensure value for money or good governance in its decision making, which will have an adverse impact on the economic vitality of the Town Centre.	35	10	10	Director of Regeneration
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date
- Teesworks report and commitment from TVCA to reflect findings in the governance arrangements of the MDC - Council representatives on the MDC Board			Refresh the Local Plan	Claire Holt	Director of Regeneration; Chief Executive	31-Mar-2025

Code	Risk Description		Original Score	Current Score	Target Score	Managed By	
SR-15	Threats to Social Cohesion and Democratic Resilience	If Communities feel disconnected and that they do not live in a safe and resilient environment that promotes the best outcomes for citizens of the town. This could lead to local flashpoints which would be damaging to community relations, the reputation and image of a multi-cultural Middlesbrough.	Probability Impact  35	Probability Impact  15	Probability Impact  14	Marion Walker	
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date	
Page 71 Internal Controls (Current Mitigations in place): - Community tension monitoring undertaken. - Community engagement undertaken. - Neighbourhood safety liaison in place. - Prevent operational group risk plans in place - Liaison with policing partners to verify validity of possible demonstrations. - Initial credibility verification through visual audits using CCTV operations and open sources. - Gatekeeping protocols with marketing and communications for potentially controversial communications - Ongoing promotion of education around disinformation and building of media literacy by partners within the local authority and via social media - Monthly meetings held with senior leadership. - Gold and Silver recovery group meetings with senior leadership teams across the organisation and partners. - Action plan developed by silver group to be reported to gold with escalations. - Community safety partnership reconstituted to provide greater strategic oversight. - MBC have secured £600k to be spent in response to community tensions as a further control.			Promote social cohesion through a dedicated local government effort, amplifying and reinforcing democratic freedoms and norms; and supporting evidence-based local cohesion initiatives.	Marion Walker		Director of Environment & Community Services; Chief Executive	30-Aug-2025
			Build resilience in local communities against extremist ideologies and narratives, including conspiracy theories and disinformation (PREVENT).	Marion Walker			30-Aug-2025
			Engage people utilising the neighbourhood model, tying in with partnership organisations, VCS, local community groups and elected members. We will work to find solutions with communities and not to them.	Marion Walker			30-Aug-2025
			Develop an early tension warning system that monitors and alerts the local authority and other key local partners about growing tensions.	Marion Walker			30-Aug-2025
			Marginalise and isolate extremist and other malign actors to prevent the mainstreaming of extremist ideologies and dangerous conspiracy theories which are causing severe harm and disruption in local areas (PREVENT).	Marion Walker			30-Aug-2025
			Respond quickly and effectively to flashpoint incidents and triggers.	Marion Walker			30-Aug-2025
			Repair relationships and engagement between local communities where they have broken down following serious conflict and flashpoint incidents.	Marion Walker			31-Aug-2026

Code	Risk Description		Original Score	Current Score	Target Score	Managed By
SR-16	Removal of the statutory override preventing the Designated School Grant (DSG) deficit from being met from general fund resources.	If the statutory override issued by central government expires as planned on 31 March 2026, without providing a national solution to the current shortfall in funding compared to demand and cost of high needs provision, this will mean that the High Needs Funding Deficit will be required to be met from the Council's general fund resources. Based upon the current projection of the DSG high needs deficit compared to the level of revenue reserves, this will result in the Council's reserves being exhausted and the Council's s151 Officer potentially being required to issue a s114 Notice. This is likely to be the case for the majority of local authorities nationally.	 15	 15	 9	Director of Education and Partnerships
Current Mitigation			Future Mitigation	Responsible Officer	Director	Target Date
- Lobbying Government to resolve the funding issue and provide a long term solution to the DSG deficit issue - Delivering DBV (Delivering Better Value) action plan. - Liaising with DoE regularly - Working with schools and settings to continuously review the funding models.			Lobbying Government to resolve the funding issue and provide a long term solution to the DSG deficit issue	Director of Finance and Transformation 	Director of Children's Services; Director of Education and Partnerships	31-Mar-2026
			Ongoing monitoring of the HNF budget	Director of Education and Partnerships 		31-Mar-2026
			Work with schools and settings to reduce the number of children and young people who are excluded.	Director of Education and Partnerships 		31-Mar-2026
			Promote greater inclusion within mainstream settings.	Director of Education and Partnerships 		31-Mar-2026
			Reduce the number of children and young people on out of area provision.	Director of Education and Partnerships 		31-Mar-2026

MIDDLESBROUGH COUNCIL

Report of:	Erik Scollay - Chief Executive
Relevant Executive Member:	Chris Cooke - Mayor
Submitted to:	Executive
Date:	3 December 2025
Title:	Council Plan 2026/27-29: Outcomes Refresh
Report for:	Decision
Status:	Public
Council Plan priority:	Delivering Best Value
Key decision:	No
Why:	Decision does not reach the threshold to be a key decision
Subject to call in?	Yes
Why:	Non-urgent Report

Proposed decision(s)

That Executive:

- approves the proposed approach and revisions to refresh the Council Plan workplan, specifically its outcomes and the changes to be effected as a result, as part of its 2026/27 refresh.
- notes that a further report will be brought forward for Executive approval, detailing the supporting Council Plan workplan (including measures and initiatives), in February 2026.
- Notes that following approval of the Council Plan workplan, supporting Service Plans and associated delivery plans will be developed and presented to Executive for approval, in March 2026

Executive summary

This report seeks Executive approval of the proposed approach and revisions to the Council Plan, as part of its 2026/27 refresh.

The Council Plan is the organisation's overarching business plan for the medium-term and is typically refreshed on an annual basis. This refresh follows a review of performance in the previous year and consideration of an outcome-driven approach to demonstrate progress and impact.

The Council Plan is part of the Council's Policy Framework and so requires the approval of Full Council, as set out in the Constitution. The Council's Budget and Policy Framework Procedure Rules provide for the Executive to draw up firm proposals on the Strategic Plan (Change Strategy) for submission to Full Council. Full Council approved the Council Plan for the period 2024-27 on 28 February 2024, which was structured around the following vision and priorities:

The vision for Middlesbrough is ***a thriving, healthier, safer and more ambitious place where people want to live, work, invest, and visit. We will support our residents to live fulfilling lives, to ensure that our communities thrive***, with the four priorities remaining, as follows:

- **A Successful and Ambitious Town:** Maximising economic growth, employment, and prosperity, in an inclusive and environmentally sustainable way.
- **A Healthy Place:** Helping our residents to live longer and healthier lives, improving life chances and opportunities to thrive.
- **Safe and Resilient Communities:** Creating a safer environment where residents can live more independent lives.
- **Delivering Best Value:** Changing how we operate, to deliver affordable and cost-effective outcomes for residents and businesses.

The vision and priorities will remain, though consideration has been given to ensure strategic cohesion and planning for effective and successful delivery of the Council Plan priorities through articulation of what it is we want to achieve, impact and change (the outcomes) and how we then deliver that change, through an enabling Council Plan workplan.

1. Purpose of this report and its contribution to the achievement of the Council Plan priorities

1.1 The purpose of this report in relation to its contribution to the Council Plan Priorities, is to outline a workplan of activities designed to deliver improved outcomes against these priorities. It also seeks to review and refine the performance indicators required to ensure that the Council can effectively monitor and measure progress.

Our Priorities	Summary of how this report will support delivery of these ambitions and the underpinning aims
A successful and ambitious town	The aims within this Priority, remain to: - attract and grow businesses to increase employment opportunities - Improve attainment in education and skills - Ensure housing provision meets local demand
A healthy place	Aims within this Priority, remain to: - improve life chances of our residents by responding to health inequalities - protect and improve our environment - promote inclusivity for all - reduce poverty
Safe and resilient communities	Aims within this Priority, remain to: - support adults to be independent for longer - improve transport and digital connectivity - promote new ideas and community initiatives - reduce crime and anti-social behaviour
Delivering best value	Aims within this Priority, remain to: - ensure robust and effective corporate governance - set a balanced revenue budget and Medium-Term Financial Plan to restore financial resilience and sustainability

2. Recommendations

2.3 That the Executive

- approves the proposed approach and revisions to refresh the Council Plan workplan, specifically its outcomes and the changes to be affected as a result, as part of its 2026/27 refresh.
- notes that a further report will be brought forward for Executive approval, detailing the supporting Council Plan workplan (including measures and initiatives), in February 2026.
- notes that following approval of the Council Plan workplan, supporting Service Plans and associated delivery plans will be developed and presented to Executive for approval, in March 2026

3. Rationale for the recommended decision(s)

3.3 To enable the Executive to approve the refresh and outcome-driven approach to the Council Plan workplan 2026/27-29 ensuring that it is reflective of major developments of the past year, and those anticipated in the coming three years whilst retaining its focus on the four priorities and existing aims.

4. Background and relevant information

- 4.1 The Council Plan is the organisation's overarching business plan for the medium-term, and is generally refreshed on an annual basis, setting out the priorities of the Elected Mayor of Middlesbrough, the ambitions for our communities and the ways in which we seek to achieve them.
- 4.2 This report proposes a refreshed Council Plan for the 2026/27-29 period articulating not only the priorities and aims of Mayor Cooke elected in May 2023, which are informed by, and responsive to the views of residents and which will need to be delivered within available resources, with a stronger focus on the outcomes which represent the measurable results or impacts of contributing initiatives and activities.
- 4.3 Becoming outcome-focused ensures that everything the organisation does is directed towards making a measurable and lasting difference for residents, communities and businesses. An outcome-based approach provides a clear line of sight between strategic priorities, service delivery, and the changes we aim to achieve across the town. It allows us to set clear goals, measure progress and make evidence-based decisions about where to target resources and for the greater benefit. This approach supports effective performance management and continuous improvement, ensuring value for money, as well as meeting the needs of its communities.
- 4.4 Residents, partners and elected members will not only understand what the Council is doing, but what differences those actions make. By defining the results we want to see, we can better communicate success and identify where further effort or collaboration is required.
- 4.5 Additionally, an outcome-focused plan encourages innovation and partnership working. Many of the challenges facing our communities - health inequalities, inclusivity, climate change, poverty, etc. - cannot be tackled by Middlesbrough Council alone. By aligning our efforts and shared outcomes, we can work more effectively with partners to achieve collective impact and deliver lasting change.
- 4.6 As a key example, a Poverty Sprint was undertaken in November 2024, which resulted in the development of an action plan, the key principles of which will be woven into the measures and metrics and activities across the Council Plan in its entirety in a report to be brought for Executive approval in February 2026.
- 4.7 One of the themes identified within the Poverty Sprint was that there were opportunities that could and should be taken to help residents access support they were entitled to but might not know about. One of the first actions that have been delivered as a result is joint with Northumbrian Water to share data that will enable residents in low-income households to be awarded a discount on their water bill where eligibility is identified, this can reduce the yearly bill by up to 40%. Sharing this information will ensure more people who are entitled to this support get access to it.
- 4.8 To that end, it is proposed that the outcomes we will focus on as a Council are:
- We will grow businesses and employment opportunities within the town
 - Attainment gaps close and increasing numbers of children and young people are working at their expected level / grade

- We will take a strategic approach to the provision of housing across the town.
- People will live healthier lives for longer, and health inequalities are reduced.
- The look and feel of the physical space in Middlesbrough will improve.
- We will be closer to our communities and involve them in decision making.
- We will reduce and alleviate the impact of poverty to improve lives and life chances for people in Middlesbrough.
- All adults will be supported through strength-based practice to live the lives they choose.
- Transport connectivity will improve, and we will promote digital inclusion.
- We will enable and support our voluntary sector and community groups.
- Residents will feel safer.
- We will be a well-run Council.
- We will set a balanced budget and medium-term financial plan.

4.9 For ease of reference, an Appendix 2 lists the current outcomes measured against national data sets, versus the proposed outcomes which will use local measures to demonstrate local progress and impact.

4.10 The element of Council Plan refresh seeking approval relates specifically to the outcomes within the Council Plan workplan. With the existing Priorities and Aims remaining in place, the revised elements will be considered by Executive for approval, rather than full Council.

4.11 The measures, metrics and initiatives to demonstrate assurance of delivery against the Council Plan, will be brought to a further meeting of the Executive in February 2026.

4.12 Supporting Service Plans and associated delivery plans will be developed and presented to Executive for approval in March 2026.

5. Ward Member Engagement if relevant and appropriate

5.1 Not applicable

6. Other potential alternative(s) and why these have not been recommended

6.1 It is imperative that the Council effectively articulates and communicates an overarching plan to direct activity across Directorates and services, towards the achievement of its priorities and ambitions.

6.2 The only other realistic potential decision would be to leave the Council's strategic activities unchanged on the assumption that they are sufficiently robust to address and achieve previously identified outcome measures. This, however, is not correct and neither would it represent an appropriate response to the needs of the town, it would detrimentally impact local communities and the business of the Council for some years ahead.

6.3 The only other feasible decisions therefore relate to the structure of the document, and its horizon (i.e., reverting to an annual plan). It is strongly in the Council's interest to plan over the medium-term, (between 3-5 years) in line with the indicative budgets over this period outlined by the Government. The proposed document achieves this whilst also providing an appropriate level of detail for all audiences on the Council's planned activity over this period.

7. Impact(s) of the recommended decision(s)

Topic	Impact
Financial (including procurement and Social Value)	The Council Plan 2026-27 and the Council's annual revenue and capital budgets are developed in parallel, to ensure full alignment between the Council's ambitions and spending plans. In outlining an achievable programme of work that delivers performance improvement within reduced resources, the Council Plan and its supporting Service Plans therefore demonstrate how the Council will deliver value for money in the medium-term.
Legal	Delivery of the Social Value Charter plays a key role in achieving the <i>Reducing Poverty</i> Aim, as part of the <i>Healthy Place</i> Priority. Implementation of the refreshed Council Plan 2026-27 will enable the Council to operate within the resources available to it, and continue to meet its various statutory duties, including the overarching Duty of Best Value.
Risk	The proposed Council Plan sets out a range of activity to address the key risks within the Council's Strategic Risk Register which have the ability to impact on the Council's ability to achieve the ambitions set out in the Council Plan. Once the refreshed Council Plan is agreed by full Council, a review of the current content will be completed, with any changes reported to Executive, as part of the quarterly performance management reports.
Human Rights, Public Sector Equality Duty and Community Cohesion	The Council Plan 2026-27 will have a positive impact on individuals and communities. It contains within it, plans to ensure that the Council has an inclusive approach for all its residents.
Reducing Poverty	The proposed Council Plan will have a positive impact on reducing poverty, subsuming actions from the recent Poverty Sprint are woven throughout the activities and measures.
Climate Change / Environmental	The proposed Council Plan will have a positive impact on climate change and the environment, with a specific priority to 'protect and improve our environment' which will focus Council activity on these areas. The Plan will set a series of measurable outcomes to be achieved against this theme.
Children and Young People Cared for by the Authority and Care Leavers	The proposed Council Plan will have a positive impact on children and young people, with a proposed priority to 'improve education and attainment' with focused activity directed at these areas. The Plan will set a series of measurable outcomes to be achieved against this theme.
Data Protection	There are no concerns that the proposed plan could impact adversely on data protection or GDPR.

Actions to be taken to implement the recommended decision(s)

Action	Responsible Officer	Deadline
Subject to Executive approval of Council Plan 2024-27 Refresh, the Council Plan workplan (including measures and initiatives) will be presented to Executive for approval.	Head of Strategy, Business and Customer	4 Feb 2026
Supporting Service Plans and associated delivery plans will be developed and presented to Executive for approval.	Head of Strategy, Business and Customer	11 Mar 2026

Appendices

1	Refreshed Council Plan Outcomes against existing Priorities and Aims
2	Existing and proposed Council Plan outcomes
3	Impact Assessment Level 1 (Initial screening assessment)

Background papers

Body	Report title	Date
Executive	Council Plan 2024-27	28 Feb 2024

Contact: Gemma Cooper, Head of Strategy, Business and Customer
Email: gemma_cooper@middlesbrough.gov.uk

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Appendix 1: Refreshed Council Plan Outcomes against existing Priorities and Aims

Priority	Aim	Outcome
A Successful and Ambitious Town	We will attract and grow businesses to increase employment opportunities We will improve attainment in education and skills We will ensure housing provision meets local demands	We will grow businesses and employment opportunities within the town Attainment gaps close and increasing numbers of children and young people are working at their expected level / grade We will take a strategic approach to the provision of housing across the town.
A Healthy Place	We will improve life chances of residents by responding to health inequalities We will protect and improve our environment We will promote inclusivity for all We will reduce poverty	People live healthier lives for longer and health inequalities are reduced. The look and feel of the physical space in Middlesbrough will improve. We will be closer to our communities and involve them in decision making. We will reduce and alleviate the impact of poverty to improve lives and life chances for people in Middlesbrough.
Safe and Resilient Communities	We will provide support for adults to be independent for longer We will improve transport and digital connectivity We will promote new ideas and community initiatives We will reduce crime and antisocial behaviour	All adults will be supported through strength-based practice to live the lives they choose. Transport connectivity will improve and we will promote digital inclusion. We will enable and support our voluntary sector and community groups Residents will feel safer.
Delivering Best Value	We will ensure robust and effective corporate governance We will set a balanced revenue budget and Medium-Term Financial Plan to restore financial resilience and sustainability	We will be a well-run Council. We will set a balanced budget and medium-term financial plan.

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Appendix 2: Existing and proposed Council Plan outcomes

Existing Council Plan 2024-25 Outcomes		Proposed Council Plan 2026/27-29 Outcomes
Household waste sent for reuse, recycling and composting	Index of Multiple Deprivation Decile 1	We will grow businesses and employment opportunities within the town
Households on Universal Credit	Key Stage 4 attainment 8 or Grade 5 or above in English and Maths GCSEs	Attainment gaps close and increasing numbers of children and young people are working at their expected level / grade
Households owed a duty under the Homelessness Reduction Act	Key Stage 1 Attainment: Percentage of pupils meeting the expected standard in reading TA	We will take a strategic approach to the provision of housing across the town.
New homes started and new homes completed	Obesity prevalence in children at reception age (aged four to five years and aged 10 to 11) and adult obesity (18 years plus)	People will live healthier lives for longer, and health inequalities are reduced.
Number of completed affordable homes delivered (gross)	Percentage of children achieving at least the expected level of development in communication, language and literacy skills at the end of reception	The look and feel of the physical space in Middlesbrough will improve.
Number of member to member complaints	Satisfaction with the local area as a place to live	We will be closer to our communities and involve them in decision making.
Total Middlesbrough Council website page views	Anti-Social Behaviour rate per 1,000 population	We will reduce and alleviate the impact of poverty to improve lives and life chances for people in Middlesbrough.
Cancer Screening coverage: Breast Cancer	Bus patronage and specifically 400m walk of a commercial daytime bus service	All adults will be supported through strength-based practice to live the lives they choose.

Domestic abuse rate per 1,000 population	Number of publicly accessible Electric Vehicle charging points	Transport connectivity will improve, and we will promote digital inclusion.
First time entrants into the Criminal Justice System	Children Looked After (CLA) placed out of area	We will enable and support our voluntary sector and community groups.
GDPR Mandatory Training Completion %	Crime rate per 1,000 population	Residents will feel safer.
Number of pupils in local authority funded alternative provision	Employment rate (16-64 years) %	We will be a well-run Council.
Household waste sent for reuse, recycling and composting	Estimated non-ringfenced reserves as a % net revenue expenditure	We will set a balanced budget and medium-term financial plan.
Rail Patronage	Proportion of people who use services who find it easy to find information about Adults Social Care services	
Residual household waste per household	The number of adults aged 18 to 64 whose long-term support needs are met by admission to residential and nursing care homes (per 100,000 population)	
Total debt as percentage of core spending power	The number of adults aged 65 and over whose long-term support needs are met by admission to residential and nursing care homes (per 100,000 population)	
Total MyMiddlesbrough user accounts	The proportion of older people (aged 65 and over) who received reablement/rehabilitation services after discharge from hospital	
Rate of births of new enterprises per 10,000 resident population aged 16 and above		

Appendix 3: Impact Assessment Level 1 (Initial screening assessment)

Subject of assessment:	Council Plan 2026/27-29			
Coverage:	Overarching / crosscutting			
Decision relating to:	☒ Strategy	☐ Policy	☐ Service	☐ Function
	☐ Process / procedure	☐ Programme	☐ Project	☐ Review
	☐ Organisational change	☐ Other (please state)		
It is a:	New approach:	☐	Revision of an existing approach:	☒
It is driven by:	Legislation:	☐	Local or corporate requirements:	☒
Description:	Key aims, objectives, and activities: The Council Plan, formerly known as the Strategic Plan, is the Council's overarching business plan for the medium-term, and is refreshed on an annual basis, setting out the priorities of the Elected Mayor of Middlesbrough and other corporate priorities and ambitions for the Council. Statutory drivers: Local Government Act 1999; Equality Act 2010. Differences from any previous approach: This will result in a new Council Plan which includes new aims, priorities and ambitions. Key stakeholders and intended beneficiaries (internal and external as appropriate): Elected members, employees of the Council, local communities and businesses, partners. Intended outcomes: To ensure that the Council's strategic objectives are achieved, and that the Council continues to comply with the duties of the Equality Act 2010 relating to the publication and pursuit of equality objectives.			
Live date:	February 2024			

Lifespan:	2026/27-29, reviewed annually
Date of next review:	Potential for full refresh 2027-28

Screening questions	Response			Evidence
	No	Yes	Uncertain	
Human Rights Could the decision impact negatively on individual Human Rights as enshrined in UK legislation?	x			No. The content of the proposed plan and delivery of it would not contravene Human Rights as identified in national legislation.
Equality Could the decision result in adverse differential impacts on groups or individuals with characteristics protected in UK equality law? Could the decision impact differently on other commonly disadvantaged groups?	x			No. The Council Plan commits to reducing inequalities within Middlesbrough. It is based on a robust evidence base of needs and includes a commitment to inclusivity for all. As a result, there are no concerns that the Plan or associated activity could have a disproportionate adverse impact on groups or individuals with characteristics protected in national legislation.
Community cohesion Could the decision impact negatively on relationships between different groups, communities of interest or neighbourhoods within the town?	x			No. The Plan commits to improving community resilience within the town, which will result in direct benefits for cohesion. As a result, there are no concerns that the proposed plan could have an adverse impact on community cohesion. Evidence used to assess this impact includes analysis of proposed activities and measures.
Care leavers Could the decision impact negatively on those who are care experienced?*	x			No. The proposed Council Plan will have a positive impact on children and young people, and those who are care experienced by ensuring that actions to improve outcomes for these groups are woven throughout the activities and measures. Evidence used to assess this impact includes analysis of data on need and analysis of proposed activities and measures.
Reducing Poverty Could the decision impact negatively on the Council's ambitions to reduce poverty in the town?	x			No. The proposed Council Plan will have a positive impact on reducing poverty, subsuming actions from the recent Poverty Sprint are woven throughout the activities and measures. Evidence used to assess this impact includes analysis of data on need and analysis of proposed activities and measures.
Assessment completed by:	Gemma Cooper. Head of Strategy, Business and Customer			
Date:	27 October 2025			
Head of Service:	Erik Scollay, Chief Executive			
Date:	27 October 2025			

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MIDDLESBROUGH COUNCIL	
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Report of:	Annabel Bates - Executive Director of Children's Services
Relevant Executive Member:	Cllr Philippa Storey - Deputy Mayor and Executive Member for Education and Culture
Submitted to:	Executive
Date:	3 December 2025
Title:	SHiFT Programme Progress Update
Report for:	Information
Status:	Public
Council Plan priority:	Safe and resilient communities
Key decision:	No
Why:	Report is for information only
Subject to call in?	No
Why:	Report is for information only

Proposed decision(s)
That the Executive: NOTES the information contained within this report.

Executive summary
The report provides an update on the partnership work between SHiFT and Middlesbrough Council since the last report to Executive on 5 March 2025. SHiFT is a national charity that aims to shift practice to improve outcomes for children and young people who are involved in, or at risk of, involvement in crime. The report requests the Executive notes the progress made in relation to our partnership working with SHiFT and the impact that it has had on our children and young people.

1. Purpose of this report and its contribution to the achievement of the Council Plan ambitions.

- 1.1 To update the Executive on our three-year partnership with SHiFT, which is a national systems change charity working alongside Middlesbrough Children's Services. The partnership began in June 2024 with the first of two 18-month programmes with children and young people caught up in, or at risk of, cycles of crime and exploitation.
- 1.2 To share with the Executive that the costs of the partnership are supported by the sum of £600,000 which SHiFT secured from the Ministry of Housing Communities and Local Government, alongside match funding of £600,000 from the Council, invested over three financial years.

Our ambitions	Summary of how this report will support delivery of these ambitions and the underpinning aims
A successful and ambitious town	SHiFT provides a pivotal role in advocating for children across social care, youth justice, education, and police services to ensure we deliver our ambitions around this theme.
A healthy Place	One of SHiFT's core values is promoting inclusivity in its work with children to ensure pathways are in place to improve life chances of children.
Safe and resilient communities	SHiFT practice is grounded in systemic change for children and young people caught up in, or at risk of, cycles of crime and exploitation. This is a key priority for SHiFT which can contribute towards the priority of reducing crime and anti-social behaviour.
Delivering best value	Robust governance is provided by the Local SHiFT Partnership Board, meeting on a quarterly basis in order to ensure value for money.

2. Recommendations

- 2.1 That the Executive notes the information contained within this report.

3. Rationale for the recommended decision(s)

- 3.1 Founded in 2019, SHiFT has a track record of delivering exceptional outcomes that break the destructive cycle of children and young people caught up in, or at risk of involvement in, crime.
- 3.2 SHiFT Middlesbrough provides 1-1 intensive support for twenty-seven of the most vulnerable children and young people in Middlesbrough. Children and young people identified for SHiFT cohort one were those for whom, despite the efforts of other professionals, 'business as usual' responses had not been able to make the difference needed and concern about their wellbeing was high and escalating.
- 3.3 At the start of SHiFT's work, over a quarter of the children were accommodated in high-cost placements, which were often a long way from home and not having an

impact on improving children's circumstances. At the time of writing this report three children have successfully returned home to reside with family, two children have returned to Middlesbrough and reside in supported accommodation and the others continue to be supported out of area.

- 3.4 From the 27 children and young people who were identified and invited for SHiFT support as part of cohort one in June 2024, most of these children and young people have engaged well, building trusting relationships with their SHiFT Guide. A recent End of Programme Report has been presented to the local SHiFT Board evidencing the positive impact on safety and wellbeing as a result of this work, including a reduction of missing episodes and a reduction in arrests compared to the 12 months prior to SHiFT involvement. Scoping for cohort two is underway and work will begin with 27 new children and young people in January 2026.
- 3.5 The total cost of the partnership to Middlesbrough Council is approximately £11k per child for an 18-month programme of intensive individual support, which includes working with everyone who is identified as important in that child's world. This represents good value for money given the highly complex needs of this vulnerable group, and the intensity and expertise of the work SHiFT is delivering.

4. Background and relevant information

- 4.1 SHiFT has a strong and growing track record of strong practice that is breaking cycles of crime with and for the most vulnerable children. Headlines from SHiFT's national evidence of impact to date, for children with a SHiFT Guide 12-18 months include:
- 41% reduction in offences
 - 58% reduction in reported missing episodes
 - 51% reduction in arrests
- 4.2 Economic analysis of SHiFT's work conducted in 2022 shows that for each child considered, costs avoided in the next five years by breaking cycles of crime ranged from £1.8m to £164k. For every £1 spent on SHiFT £8 is saved over 5 years.
- 4.3 The SHiFT programme contributes to Safe and Resilient Communities within the council plan through a reduction in crime and anti-social behaviour and through the promotion of new ideas and community initiatives.
- 4.4 SHiFT practice is delivered via a small group of highly skilled professionals who are closely supported and challenged to work in 'the SHiFT way' by SHiFT's national team and multiagency local governance. Each guide works intensively and consistently with six children, with the lead guide working with three children.
- 4.5 The annual partnership review was presented to the Local SHiFT Board in October 2025 and noted that SHiFT practice closely monitors progress for children and families as part of SHiFT's Quality Assurance and Improvement Framework. Guides share monthly child level survey data, which is analysed alongside baseline data (the year prior to SHiFT) to track change and impact.

- 4.6 The annual review highlighted the work of SHIFT Guides who have worked with children in a variety of ways, often going over and above to provide support to the children they are working with. Activity has included support with access to education, training, and employment by arranging for children to attend open days, assisting with their applications, and taking them to interviews. Attending the Police Station and/or Court to assist with interviews and court processes, maintaining contact with children placed out of area often travelling significant distances on a regular basis to maintain a positive relationship with the child.
- 4.7 Data presented in the annual review shows a 68% decrease in suspensions, permanent exclusions, and managed moves, a 50% decrease in reported missing episodes, 9% decrease in arrests and 22% of children in the cohort closing to Children's Social Care or Early Help.
- 4.8 The learning from cohort one has been fundamental to assisting with the shaping of the strategic objectives for cohort two which are in the final stages of development, ready to begin work with this new group of children in January 2026.

5.0 Ward Member Engagement if relevant and appropriate

5.1 Not applicable.

6.0 Other potential alternative(s) and why these have not been recommended.

6.1 There are no alternative recommendations in this update report.

7.0 Impact(s) of the recommended decision(s)

Topic	Impact
Financial (including procurement and Social Value)	The total cost of the partnership with SHIFT is approximately £1.2m over three financial years from April 2024, with £0.6m of funding from the Ministry of Housing Communities and Local Government, alongside match funding of £0.6m from the Council. This is funded as a transformation initiative from Flexible Use of Capital Receipts over three financial years. Specific cost savings targets of £0.4m per annum from 2024/25 were included for the SHIFT Project (CC06) in the 2024/25 approved budget by Council. However, it has since been determined that the purpose of the SHIFT programme is primarily to drive service improvements rather than budgeted cost savings. The Executive approved, as part of the 2024/25 Revenue and Capital Outturn report to Executive on 11 June 2025, that the savings would be merged with the Review of Placements (CC02) savings targets. These are now monitored as part of the Preventing Care Starts and Placement Sufficiency project at the monthly Children's Thematic Transformation

	Board, alongside broader impact data, and on a quarterly basis through Middlesbrough's Local SHiFT Board.
Legal	No new legal considerations.
Risk	In relation to risk that practice does not deliver benefits as intended, the Partnership Agreement provides for termination of the partnership on notice, or without notice in exceptional circumstances. Key mitigations in relation to operational risk to children/families and associated reputational risks include regular oversight through the Local SHiFT Board chaired by the Executive Director of Children's Services. The Board ensures that the programme is delivered as intended and any emerging issues are swiftly addressed. SHiFT meets all Charity Commission governance requirements, with a Board of Trustees (who meet quarterly) and specialist sub-Committees. SHiFT has a clear, regularly reviewed and communicated safeguarding policy and Critical Incident Notification Process. Continued implementation of the SHiFT project is relevant to the following strategic risks and impacts positively on them: - SR02 – Volatility in the demand, complexity and cost of children's social care - SR01 – Failure to maintain a balanced budget and MTFP - SR13 – Failure to deliver transformation successfully
Human Rights, Public Sector Equality Duty, and Community Cohesion	There are no human rights, equality or community cohesion issues arising because of the recommendations in this report. The SHiFT programme's impact on reducing crime and improving behaviour and engagement in school is likely to correlate to improvements in community cohesion in the longer term.
Reducing Poverty	Improving access to and engagement with education and partner services for vulnerable children within the cohort can support them to achieve better educational outcomes. This is linked to increased employability skills that reduce the likelihood of experiencing poverty as adults.
Climate Change / Environmental	There are no climate change / environmental issues arising as a result of the recommendations in this report.
Children and Young People Cared for by the Authority and Care Leavers	SHiFT is working with children and young people, some of whom are care experienced, to improve their outcomes and mitigate risk factors. Continued delivery of the programme will positively impact on those children in scope. Learning from it will also be applied to the wider

	cohort of children that the Council works with, supporting work to improve outcomes.
Data Protection	A Data Protection Information Agreement is in place to ensure a compliant framework for sharing Council data with SHiFT.

Actions to be taken to implement the recommended decision(s)

Action	Responsible Officer	Deadline
Further update required on progress	Executive Director of Children's Services	September 2026

Background papers

Body	Report title	Date
SHiFT Initial Executive report	SHiFT Executive Report	20 December 2023

Contact: Kay Dargue, Head of Partnerships and Operational Lead for SHiFT Middlesbrough.

Email: Kay_dargue@middlesbrough.gov.uk

MIDDLESBROUGH COUNCIL	
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Report of:	Louise Grabham - Director of Adult Social Care and Health Integration
Relevant Executive Member:	Cllr Julia Rostron - Executive Member for Adult Social Care
Submitted to:	Executive
Date:	3 December 2025
Title:	Domestic Abuse Strategy 2025-2028
Report for:	Decision
Status:	Public
Council Plan priority:	Safe and resilient communities
Key decision:	Yes
Why:	Decision(s) will incur expenditure or savings above £250,000
Subject to call in?	Yes
Why:	Non-Urgent Report

Proposed decision(s)
That Executive: • APPROVES the Middlesbrough Domestic Abuse Strategy 2025-2028 • APPROVES the proposed commissioning recommendations, as outlined in the Commissioning Plan (Appendix 2) with procurement to commence in 2025/26.

Executive summary
Middlesbrough Council have a statutory duty under the Domestic Abuse Act 2021 to assess the need for accommodation based domestic abuse support in their area every three years, develop and publish a strategy for the provision of support having regard to the needs assessment, give effect to strategy (through commissioning and decommissioning decisions) and monitor and evaluate the effectiveness of the strategy. Domestic abuse strategies play a critical role in preventing abuse, protecting victims and coordinating support services within local communities. This strategy identifies the

positive partnership work delivered to date and sets out the key strategic objectives required moving forward.

The Middlesbrough Domestic Abuse Strategy 2025-2028 has been developed by the Middlesbrough Domestic Abuse Strategic Partnership Board (DASP). This strategy builds on the strong foundations established via the Preventing Domestic Abuse Strategy (2019) and the Domestic Abuse Safe Accommodation Strategy (2021). The Strategy has been developed taking into account the following:

- Domestic Abuse Needs Assessment
- Option Appraisal regarding future model for Safe Accommodation

As a result of the Needs Assessment, which has led to the strategy development the Domestic Abuse Strategic Partnership has also identified gaps in support services locally and has proposed a number of commissioning recommendations (Appendix 2) which relate to:

- **Safe Accommodation** (Refuge, Sanctuary, Dispersed, Complex need)
- **Community Based Provision** (Referral and Response, Independent Domestic Violence Advisers, Therapeutic support and counselling, Parenting support)
- **Prevention** (Work with schools and Colleges, Community Engagement, Domestic champions, and support with employers)
- **By and For Specialist Service** (Services working with protected characteristics)
- **IRIS Programme** (Working with Primary care to identify and respond to domestic abuse effectively)
- **Immigration Advice** (For victims and their children who are fleeing domestic abuse with insecure immigration status)

Approval from Executive will support and endorse the work of the Domestic Abuse Strategic Partnership in progressing the strategic key objectives and will facilitate procurement processes to commence in 2025/26, to deliver the required commissioning intentions.

1. Purpose of this report and its contribution to the achievement of the Council Plan ambitions

- 1.1 The Domestic Abuse Strategy impacts of a number of statutory council departments, and promotes a partnership approach towards tackling domestic abuse in the form of the Middlesbrough Domestic Abuse Strategic Partnership.

Our ambitions	Summary of how this report will support delivery of these ambitions and the underpinning aims
A successful and ambitious town	Domestic Abuse is a significant cause of homelessness, which can create a cycle of vulnerability and further exploitation. Key barriers to leaving abusive situations include a lack of safe and affordable housing.

	Aims within strategy is to ensure Middlesbrough has safe accommodation which meets the demand for this provision, and which meets diverse needs of victims/ survivors and there is specialist support is find safe housing and access support.
A healthy Place	Domestic abuse has significant impact on long term health outcomes. Aims within this strategy are to ensure. We have appropriately resourced Independent Domestic Violence and abuse advisers so we can prevent homicides and reduce risk victims and their children. All GP practices in Middlesbrough are IRIS approved and can recognise and respond to Domestic Abuse. Victims/ survivors and their children have access to therapeutic interventions and counselling to support long term recovery form domestic abuse.
Safe and resilient communities	Domestic abuse has a significant corrosive impact on individuals' families and communities. Aims within strategy are to ensure that prevention work has strategic investment, and programmes are developed with children and young people, so they learn about healthy relationships, members of communities are trained as Ask Me ambassadors so they recognise and respond to Domestic Abuse and Employers are supported to develop policies and champions so appropriate support is provided to employees experiencing it.
Delivering best value	The Domestic Abuse ACT 2021 requires local authorities to ensure that all domestic abuse specialist services who are commissioned by Middlesbrough adhere to quality standards and have required level of accreditation. Aim within strategy is to ensure that we continue to have high quality provision and robust contract arrangements are in place, so impact and improved outcomes is fed back regularly to Middlesbrough Domestic Abuse Strategic Partnership Board.

2 Recommendations

2.1 That the Executive:

- APPROVES Middlesbrough Domestic Abuse Strategy 2025-2028
- APPROVES the proposed commissioning recommendations, as outlined in the Commissioning Plan (Appendix 2) with procurement to commence in 2025/26.

3 Rationale for the recommended decision(s)

- 3.1 Middlesbrough Local Authority has a statutory duty to publish a Domestic Abuse Needs Assessment (Appendix 3) to determine the level of need for domestic abuse support, and to develop a Domestic Abuse Strategy which sets out the Local Authority's vision and strategic objectives for next three years. This has been undertaken and now sets out the immediate and long-term commissioning intentions, which will increase specialised safe accommodation, improve community-based support for victims and develop stronger partnerships between services working directly with domestic abuse victims and their children
- 3.2 The Statutory Domestic Abuse Needs Assessment has been agreed by the Domestic Abuse Strategic Partnership (DASP) and was published September 2025. The executive summary is attached in Appendix 3 – this needs assessment has informed the strategy development.
- 3.3 The Needs Assessment has identified a need to recommission and reconfigure all Domestic Abuse provision to ensure priority areas are appropriately resourced and there are clear pathways for victims and survivors to access either community-based support and / or safe accommodation.
- 3.4 The recommended approach is to commission an independent specialist integrated protect and support service which incorporates all domestic abuse community-based provision, a diverse specialist safe accommodation service which will incorporate sanctuary, refuge, provision for complex need and dispersed properties and a prevention programme service which will comprise of prevention programmes in education, communities and employers.
- 3.5 Some immediate commissioning priorities have also been identified which will be commissioned this financial year to address gaps in provision, which includes a specialist By and For framework, immigration advice for victims and families with insecure immigrations status and extending IRIS and DAPP (Domestic Abuse Perpetrator Programme) Programmes which works with perpetrators.

4. Background and relevant information

- 4.1 The Domestic Abuse Act 2021 created statutory duties on Local Authorities, to assess the need for, prepare and publish strategies for providing accommodation-based support to victims and their children in safe accommodation. These duties also include convening Domestic Abuse Partnership Boards, monitoring the support strategies and allocating funding to carry out obligations. The Government allocates funding to Local Authorities to support delivery of these duties and monitors this via an annual delta return.
- 4.2 The Domestic Abuse Needs Assessment has taken six months to complete and has involved extensive consultation with Domestic Abuse Strategic Partnership, statutory and non-statutory stakeholders, commissioning bodies, staff and victims and survivors via surveys, and group consultation via Middlesbrough survivor panel. The terms of reference for the Needs Assessment were developed in line with government guidance and template for undertaking this work.

- 4.3 The Needs Assessment identified some key achievements since 2021. Middlesbrough Council commissioned an integrated Protect and Support service for adult victims and survivors which created a single point of access and ensured a more coordinated response for victims. In addition a therapeutic child and young person service was commissioned, which ensured children who have experienced domestic abuse have access to therapeutic intervention. Middlesbrough Council have raised public awareness of the needs and experiences of victims and survivors of domestic abuse by continually promoting education, training, and action to prevent it and have worked in collaboration with Domestic Abuse specialist services to develop a survivor panel. Middlesbrough Council have also driven innovation by supporting and funding one of our specialist domestic abuse services to deliver the gold standard IRIS Programme which has been successfully embedded across Primary Care services.
- 4.4 The Needs Assessment has also identified some significant challenges. Services have become overwhelmed by the frequency and complexity of domestic abuse incidents, particularly with higher risk cases. The accumulative impact of repeat incidents, which are at a high level in Middlesbrough are not always appreciated or managed effectively as a multi-agency partnership. It is essential we develop a system and well-coordinated process to cope with high demand and have the appropriate funding assigned so commissioned services can deliver effectively.
- 4.5 The Domestic Abuse Strategy 2025- 2028 and the identified strategic objectives for next three years have been developed in consultation with Middlesbrough Domestic Abuse Strategic Partnership Board and is based on learning and recommendations identified in the Needs Assessment. This work will then inform how we commission our future domestic abuse services.

5. Ward Member Engagement if relevant and appropriate

- 5.1 The Deputy Mayor as chair of Middlesbrough Domestic Abuse Strategic Partnership Board until October 2025 has been consulted and involved in development of this Strategy.

6. Other potential alternative(s) and why these have not been recommended.

- 6.1 The only alternative option is to remain with the existing strategy from 2019. However in doing so the Middlesbrough Domestic Abuse Strategic Partnership Board will not have any agreed updated strategic objectives and will fail to meet statutory obligations. Furthermore delays will compromise how we recommission Domestic Abuse services, which would fail to meet local need. The current domestic abuse contracts are not aligned and configured correctly to reflect the current needs and demand for the services. The current contracts are due to expire in March 2026, and failure to re-procure in a timely, planned way could result in financial and organisational instability for Service Providers and service delivery. The Needs Assessment has made specific recommendations, and the Domestic Abuse Act

funding must be used specifically for safe accommodation. Therefore to remain operating under the 2019 strategy is not a viable option.

7. Impact(s) of the recommended decision(s)

Topic	Impact
Financial (including procurement and Social Value)	The financial implications of the Domestic Abuse Strategy have been assessed in the context of the Council's Medium Term Financial Plan (MTFP). While the strategy does not currently anticipate any increase in overall costs, full financial assurance cannot be given. This is because the contracts for the new services have not yet been awarded and the figures included in the financial plan are indicative only and may change. However, the risk of any significant change is expected to be very minimal, and finance will continue to closely monitor the commissioning process and services throughout 2026/27. If any financial risk is identified, corrective action will be taken to manage the impact. Funding for the commissioned services will be met from base budget, the Domestic Abuse Safe Accommodation grant, and the Public Health grant and this has been confirmed with the relevant budget holders. The overall budget envelope is £1,132,734. A VAT assessment has been undertaken, and the proposal is considered to be outside scope. There are no implications for the Council's partial exemption position, and advice has been sought from the VAT team where appropriate. Procurement requirements have been reviewed in line with the Council's Contract Procedure Rules. The proposed procurement route will be a combination of both tender and quotation process. There is a dedicated Commissioning Officer identified for this procurement, in addition to the Procurement Team being consulted to ensure compliance. Where applicable, the procurement process will incorporate social value considerations, including local employment and community benefit, in line with the Council's Social Value Policy. In summary, the proposal represents a re-structure of the Council's Domestic Abuse service in line with statutory requirements, and financial risks have been considered.
Legal	The Domestic Abuse Act 2021 creates duties on Local Authorities, specifically at section 15-17 with regard to duties

	in relation to the Commissioner, and Part 4 of the Act referencing support. The recommendations in the report will enable the Council to comply with its obligations under the Domestic Abuse Act 2021.
Risk	The Domestic Abuse Strategy aims to intervene and keep more victims and their children safe, reduce the occurrence of domestic abuse and repeat victimisation and end the harm caused by all forms of domestic abuse. The Strategy can only be effective if Middlesbrough Council commissions and procures high quality domestic abuse services which can evidence improved outcomes for victims and their children.
Human Rights, Public Sector Equality Duty, and Community Cohesion	Domestic Abuse denies those experiencing it the most fundamental of human rights. Victims and their children with protected characteristics are disproportionately impacted by domestic abuse. An impact assessment is attached at appendix 4.
Reducing Poverty	Poverty can trap victims and children in harmful relationships. It can exacerbate the impact of domestic abuse because it interferes with a victim's ability to leave abusive relationships.
Climate Change / Environmental	Strategy will not impact on this
Children and Young People Cared for by the Authority and Care Leavers	Domestic Abuse is a common factor for children and young people assessed by Local Authorities. Children who grow up with domestic abuse are at a higher risk of developing mental health issues and may become victims or perpetrators of abuse themselves in the future
Data Protection	The Strategy effectiveness will be monitored centrally via a dashboard which will collate and present data and report this to Middlesbrough Domestic Abuse Strategic Partnership Board. An information sharing protocol has been developed in conjunction with the Data Protection Officer.

Actions to be taken to implement the recommended decision(s)

Action	Responsible Officer	Deadline
Domestic Abuse Strategy will be published on Middlesbrough Council website, alongside Needs Assessment Executive Summary and full report which were published in September 2025.	Domestic Abuse Strategic Lead	December 2025
All Domestic Abuse contracts will be extended	Head of Commissioning - Adult Social Care	November 2026

from 1 April 2026 until 30 November 2026 so they can all start 1 st December 2026		
Planning work will be undertaken to design specifications for Domestic Abuse services based on commissioning recommendations and operational requirements outlined in Need Assessment	Domestic Abuse Strategic Lead	April 2026
Procuring Domestic Abuse Services will be implemented in a phased process during 2026/27 with all DA services contracts starting from 1 st December 2026	Domestic Abuse Strategic Lead	December 2026

Appendices

1	Domestic Abuse Strategy 2025-2028
2	Proposed Commissioning Plan
3	Executive Summary – Domestic Abuse Needs Assessment 2025
4	Equality Impact Assessment

Background papers

Body	Report title	Dat
Middlesbrough Domestic Abuse Partnership Board	Domestic Abuse Needs Assessment	Published September 2025

Contact: Claire Moore

Email: claire.moore@middlesbrough.gov.uk

Title	Middlesbrough Preventing Domestic Abuse Strategy 2025-2028			
Creator	Author(s)	Claire Moore Domestic Abuse Strategic Lead		
	Approved by	Middlesbrough Domestic Abuse Strategic Partnership		
	Department	Accessing Change Together		
	Service area	Adult Social Care		
	Head of Service	Ruth Musicka		
	Director	Louise Grabham		
Date	Created	July 2025		
	Submitted			
	Approved			
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Status	Draft			
Contributor(s)	Domestic Abuse Strategic Partnership			
Subject	Domestic Abuse			
Type	Strategy			
	Vital Record		EIR	
Coverage	Middlesbrough Domestic Abuse Partnership			
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Version	Date	Name/Service area	Action	
1.0				
1.1				
1.2				
1.3				
Contact:	@middlesbrough.gov.uk			

Foreword

Welcome to Middlesbrough Domestic Abuse Strategy. This strategy builds on the strong foundations established via the Preventing Domestic Abuse Strategy (2019) and Domestic Abuse Safe Accommodation strategy (2021).

Domestic Abuse is pervasive and has far reaching effects which can shatter the lives of victims and their children and our local communities. We know that it can have devastating consequences. Locally the prevalence of domestic abuse is high, and we have seen some incidents within recent years that have led to the death of victims which have resulted in domestic homicide reviews, Sadly, we also know people are driven to take their own lives as a result of the impact of domestic abuse.

Domestic Abuse is a cross-cutting theme and effective protection, support and prevention is reliant on maintaining a strong system wide partnership across Middlesbrough. It is our duty as Middlesbrough Domestic Abuse Strategic Partnership to ensure that victims and their children have access to the specialist support and safe accommodation, they need via a range of options to ensure a strong safety net for anyone experiencing or facing the threat of domestic abuse. It is also crucial to provide ongoing support as victims and their children rebuild their lives after the trauma of domestic abuse.

Domestic Abuse is a challenging issue for the Middlesbrough Domestic Abuse Strategic Partnership Board and remains a huge burden on public funds. This Strategy sets out a multi-agency approach to tackling domestic abuse and focuses on prevention which incorporates promoting awareness, protecting and supporting victims and their children and improving performance. It recognises we have a collective responsibility to ensure we stop domestic abuse before it starts and to do this, we must address the attitudes and behaviours that contribute to the cultural acceptance of Domestic Abuse in our communities. Middlesbrough Domestic Abuse Strategic Partnership Board acknowledges that, tackling known perpetrators and preventing perpetration is also a priority which is addressed within the Tees-wide Domestic Abuse Perpetration Strategy 2025-2035 for this reason priorities around tackling Domestic Abuse perpetration will not be included in the scope of this strategy. There are two initiatives which Cleveland Police and Cleveland Office of Police Crime Commissioner have been selected to pilot by the Home Office and Ministry of Justice which will be overseen by the Domestic Abuse Perpetration Strategy 2025-2035 but also monitored via this strategy. The Domestic Abuse Protection Orders (DAPO) Pilot which launched in March 2025 and provides protection for victims of domestic abuse and the Drive Project, which offers intensive case management for high risk perpetrators which will be implemented in January 2026.

As Middlesbrough Domestic Abuse Strategic Partnership, we have raised public awareness of the needs and experiences of victims and survivors of domestic abuse and that domestic abuse is unacceptable by continually promoting education, training and action to prevent it. A key element of this has to been to work in collaboration with Domestic Abuse specialist services to develop a survivor panel to increase understanding of experiences and barriers they have faced, funding a

specialist service to identify, and train ASK ME community ambassadors who can recognise and respond to Domestic Abuse.

We have also driven innovation in improving the response to Domestic Abuse and are proud to have supported and funded one of our specialist domestic abuse services to continue to deliver the gold standard IRIS Programme which has been successfully embedded across Primary care services. This has had a significant impact on how we identify hidden victims who may not ordinarily have disclosed or accessed specialist services.

Despite the partnership achievements we recognise we still have a lot of work to do to achieve our vision and ensure all our Middlesbrough residents can live free from domestic abuse and work toward the Government aims to halve violence against women and girls in next ten years. This Strategy is supported by a sound evidence base and has been refreshed in response to the strengths and areas for improvement identified in the Strategic Needs Assessment approved in July 2025. This Needs Assessment consulted with professionals, services and victims and survivors to understand local need. The views of the participants have been invaluable, and we want to thank them for their insight, openness and honesty. We understand how difficult it is to share experiences, but we are determined to use this to make a difference, so no one ever feels trapped and alone.

The purpose of this document is to outline the high-level strategic intentions and set out how we will bring together key partners to provide strategic leadership to drive improvements in how we tackle and prevent Domestic Abuse in Middlesbrough.

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1. Introduction
2. Legislative, regulatory and governance framework
3. Vision
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7. Implementation
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9. Evaluation

1. Introduction

In 2019 Middlesbrough Domestic Abuse Strategic Partnership launched a Domestic Abuse Strategy which detailed our commitment to prevent domestic abuse, and later in 2021 the Middlesbrough Safe Accommodation Strategy. This Strategy will now replace both previously published strategies. It adopts the Definition of Domestic Abuse as defined in the Domestic Abuse Act 2021. There is now a statutory duty on Local Authorities to bring together key local partners, including local specialist domestic abuse services, in a local domestic abuse local partnership board which also involve survivors.

Since 2019 we have made steady progress with key achievements including:

- Committed executive members take responsibility for Domestic abuse and Violence Against Women and Girls Agenda
- Domestic Abuse Strategic Partnership has appropriate and balanced representation to champion the interests of victims and survivors
- The Domestic Abuse Strategic lead is experienced and takes a lead role in partnership coordination regarding Domestic Abuse policy, practice and commissioning
- A nominated and appropriately skilled officer will be responsible for domestic abuse data collection and management information, and this will be collected centrally and hosted on a dashboard.
- We commissioned an integrated Protect and Support service for adult victims and survivors which created a single point of access and ensured a more coordinated response for victims in needs of different types of support and intervention.
- We provided funding and supported a specialist service to launch and embed IRIS which is a gold standard initiative.
- We have commissioned a therapeutic child and Young Person service, which ensures children who have experienced domestic abuse have access to therapy and we have a dedicated Independent Domestic Violence Advocate (IDVA) for children and young people experiencing abuse in their intimate partners relationships
- We commissioned high quality domestic abuse training which has been delivered across children and adults' services, so staff are better equipped, to improve both their understanding of the dynamics of domestic abuse and coercive control, and how to respond effectively
- We provided funding for a Domestic Abuse Senior Practitioner in the Multi Agency Children's Hub (MACH) to improve screening and engagement for vulnerable victims and children
- We have increased IDVA provision to try and meet Safe Lives recommendations
- We commissioned a range of safe accommodation, including refuge, sanctuary, dispersed and semi-independent move on scheme.
- We created a Flexible Flee Fund which has helped ensure victims and children with no recourse to public funds can access safe accommodation options without being turned away from support.
- The commissioned Specialist services have created a supportive and nurturing environment for service users and staff and have strong emphasis on partnership work.
- We funded a Domestic Abuse Navigator role, so victims placed in emergency interim accommodation have swift access to food/ clothing / additional support and identify alternative safe or more suitable accommodation quickly
- We developed a survivor panel alongside domestic abuse and sexual violence services to help inform service development and review and increase victims' confidence and engagement.
- We updated our website and published leaflets, so people have a clearer understanding of what Domestic Abuse services are available in Middlesbrough and what support pathways are in place across all organisations.

- We participated in the co-production of a Tees-wide Tackling Perpetration Strategy to ensure victim-survivor voices inform responses to tackling perpetrators and prevention of perpetration

Building on our work, this Strategy sets out how we will continue to tackle domestic abuse over the next three years. It aims to strengthen our response further and deliver on key strategic objectives in relation to preventing domestic abuse, prioritising emergency and long-term support for victims-survivors and their children and developing a whole system response with an informed workforce across partnership. This strategy sits alongside other multiple strategies and related policies and encompasses local need assessment, audit and review learning and recommendations. It has been informed by victims-survivors, professionals and key stakeholders.

2. Legislative, regulatory and governance framework

There has been a significant amount of policy and legislative activity to address domestic abuse. Most notably, the landmark Domestic Abuse Act 2021 and the Tackling Domestic Abuse Plan 2022 was published. The Domestic Abuse Act 2021 creates the first statutory definition of domestic abuse which includes not only physical violence, but that of emotional, coercive and controlling behaviour and economic abuse. The Act introduces new criminal offences, including the threat to publish intimate images, non-fatal strangulation, and extends the offence of controlling and coercive behaviour to apply post-separation. Under the Act, children receive statutory recognition as ‘victims’ rather than ‘witnesses’ if they see, hear or experience abuse, and statutory duties are placed on local Authorities to provide accommodation support for victims-survivors and their children. The Tackling Domestic Abuse Plan identifies the key problem areas requiring action and details the approach to addressing these issues by prioritising prevention, supporting victims, pursuing perpetrators, and creating a stronger system.

The Strategy, vision and strategic aims underpin the Middlesbrough Council plan ambitions related to a healthy place and safe resilient communities. Preventing Domestic Abuse is paramount if Middlesbrough is going to make any progress on priorities, such as reducing crime and anti-social behaviour, promoting inclusivity for all, reducing poverty, preventing homelessness and improving peoples physical and mental health.

3. Vision

Our vision is that through this Domestic Abuse Strategy we want to intervene and keep more people safe, reduce the occurrence of domestic abuse and repeat victimisation and end the harm caused by all forms of domestic abuse to people in Middlesbrough.

4. Strategic Aims

Prevention

- Increase awareness across all sections of communities in Middlesbrough that violence against women, domestic abuse and sexual violence is unacceptable to enable us to prevent domestic abuse happening in first place.
- Ensure we have appropriately skilled and knowledgeable workforce across partnership who can respond effectively to domestic abuse and get it right first time.
- Increased awareness in children and young people of the importance of safe, equal and healthy relationships and that abusive behaviour is always wrong.

Protect and Support

- Victims-Survivors and their children experiencing any form of domestic abuse are offered appropriate support and assistance as early in their experience as possible.
- Victims-Survivors and their children are protected and supported and are met by effective collaborative victim led support which ensures a safe space for action.
- Victims-Survivors and their children are supported long term to recover from trauma and abuse and increase resilience over time.
- Victims-Survivors and their children who are fleeing domestic abuse are able to access safe accommodation that is appropriate to their individual needs, inside and outside of Middlesbrough
- Victims-Survivors experiencing domestic abuse who wish to remain in their home can do so safely to prevent them from becoming homeless and/or their risk escalating.
- Victims-Survivors with protected characteristics are given choice and able to access a range of specialist services for survivors led by and for the communities they serve.

Performance

- For Middlesbrough Domestic Abuse Strategic Partnership to create a shared agenda for preventing domestic abuse across whole partnership.
- Establish a coordinated partnership working at multiple levels, with a range of statutory and voluntary services.

5. Current Position

Protect and Support

Improved screening within various settings has increased the identification of domestic abuse and subsequently increase demand over last five years. Services have become

overwhelmed by the frequency and complexity of Domestic Abuse incidents, particularly with higher risk cases. The accumulative impact of repeat incidents, which are at a high level in Middlesbrough are not always appreciated or managed effectively within as a multi-agency partnership. It is essential we develop a system and well-coordinated process to cope with high demand.

The Domestic Abuse contracts commissioned in April 2021 immediately identified capacity issues, particularly in relation to referral and response and IDVA provision. The provider market did not feel they were effectively resourced to respond to the existing demand.

Domestic Abuse services are not available at a weekend, outside of work hours and at key times when victims are most likely to need them. Current delivery is now heavily weighted towards crisis intervention therefore limited availability of long-term support services for victims who have left abusive relationships.

At the point of accessing services, victims and their children are often at crisis point and require a risk management approach from services. There is evidence that some statutory services withdraw once a victim-survivor has engaged a specialist service, and / or they have left the abuser which is a critical time which requires a multi-agency response.

It is imperative we sustain and further develop the Independent Domestic Violence Advocate (IDVA) to contribute to a reduction in the victim withdrawal rate and help ensure positive outcomes for victims and their children. Delays with court cases, which in turn impacts on IDVAs ability to respond and manage caseloads.

A high volume of cases concerning Domestic Abuse relate to Cleveland Police Public Protection Notification (PPN) and High, Medium and Standard cases are directed to a single Protect and Support Service which creates a burden on that service to risk assess and triage all cases and this does not seem to improve outcomes for all victims-survivors as many do not go on to engage.

Statutory Services

There is a need to increase confidence and professional practice to ensure the victim is not relied on as the solution and /or held accountable for safeguarding their children and instead increase understanding of coercive control and for professionals to recognise the potential they have to enable victims to expand their 'space for action'.

Children's services do not have evidence-based model specifically focused on domestic abuse despite this impacting on a significant proportion of their families.

We need to recognise the need to create opportunities for 'safe space for action' and understand some of the challenges/ barriers victims face when accessing domestic abuse services, such as travel costs, childcare and full-time employment which makes a traumatic situation even more difficult for victims- survivors and their children, particularly if this imposed as part of a protection plan.

The Freedom Programme is a voluntary programme for victims and survivors to help understand domestic abuse and break cycle, but it is being included as a conditional

requirement of child protection plans/ assessments which is impacting on engagement and motivation of participants.

There is a gap in relation to family work for which provides partial and emotional support to families experiencing domestic abuse to improve family wellbeing and safety and work with social services and agencies to offer early intervention work. Work with children who have experience domestic abuse needs to incorporate a range of interventions, which are age appropriate including therapeutic interventions.

We currently do not have a commissioned programme or service for those families experiencing Child/Adolescent Parent Violence & Abuse (CAPVA). Front line services support families who have disclosed but response and recording is inconsistent and often does not prevent an escalation in severity or police involvement.

Safe Accommodation

There is a continued challenge of refuge accommodation not being suitable for some victims. Some victim's needs cannot be supported by a refuge model, with some struggling to cope in a refuge environment and the expectations of them.

There is still not sufficiently diverse safe accommodation options for victims and their children, and we lack suitable safe accommodation provision for victims with complex need and or protected characteristics such as adapted properties and/ or larger properties for black and migrant families who may be multi-generational and need to stay together.

Delays due to internal processes and screening in some safe accommodation can cause delays for victims being able to access emergency safe accommodation. Despite a shared system and working within ACT the safe accommodation pathways between providers is still disjointed and heavily reliant on routes to support.

Protected Characteristics

Middlesbrough's population is increasing and becoming more diverse so there is a growing need to ensure we can provide specialist support as and when required for victims with protected characteristics.

We know from research that some groups are at greater risk of becoming a victim, including people with disabilities, some ethnic groups and where relationship inequalities exist and sometimes those victims are hidden from statutory and Domestic Abuse Specialist services.

Victims-survivors experiencing abuse who may have limited access to public funding due to their immigration status may be highly vulnerable, their status may be an additional way for a person using abusive behaviour to control them. Dependent on their situation there may be opportunities to support them under various legislation which might include the Care Act (2014) and the Children Act (Section 17, 1989) and the Human Rights Act (1998). The Middlesbrough Domestic Abuse Strategic Partnership Board will work where possible to support those impacted by abuse where limits to public funds may be in place using this legislation and via the flexible flee fund

set up in Middlesbrough and improve professional knowledge in relation to available routes of support.

We are facing challenges in Middlesbrough in relation to delays in accessing legal/immigration appointments for victims and survivors of domestic abuse but also professionals understanding of process which is resulting in victims and children's being funded in costly placements / and receiving payments longer than is necessary.

There is a need to build cultural competence and understanding across wider system statutory services are relying heavily on Domestic Abuse services to risk assess and action protective measures, particularly in relation to Honour Based Abuse and Forced marriage cases.

Domestic Abuse and Homelessness

Interim emergency accommodation is used in a large proportion of domestic abuse cases. The housing crisis has impacted on the housing market and availability of long-term accommodation options has significantly reduced or no longer affordable, so victims-survivors are waiting longer on the social housing register even if they have been given priority banding.

Preventative options are not sufficiently explored to mitigate risks if someone is identified as at risk of homelessness.

We do not have a suitable central building to offer gender and trauma informed appointments for those at risk of homelessness and experiencing domestic abuse.

Middlesbrough is experiencing a housing crisis, for a long time there has been expectation that if someone experiences domestic abuse they should be moved. In Middlesbrough some of those victims-survivors refuse safe accommodation options and emergency interim accommodation and wish to remain in existing property until an alternative is identified. In the social housing systems, Band 1 typically represents the highest priority for rehousing. This band is reserved for those with the most urgent housing needs, such as those facing severe and immediate risks. Currently in Middlesbrough there are too many applicants in Band 1, which can lead to a situation where the overall movement on the register is slow, as those with the highest priority are considered first, and there may be limited availability of suitable properties. The Common Allocation Policy has recently been updated August 2025. Victims-survivors who have lost/or are at risk of losing their accommodation due to violence or the threat of violence will be considered Band 1 urgent housing need, but it introduces a change that when looking at safety, moves within the same or neighbouring postcode would not be considered as this may not sufficiently reduce the risk of Domestic Abuse. Some victims-survivors may receive a direct offer of housing. Victims-survivors will continue to not need to have a local connection in line with statutory guidance.

Domestic Abuse and Complex Needs

Mental health is identified as one of primary issues adult victims are experiencing when accessing services. A victim's capacity to consent or their capacity to make decisions can fluctuate dependant on their mental health, and the scale of how coercive abuse might be limiting their freedom. Consultation has highlighted that

mental health services may not have some of the key components related to their response such as routine enquiry and / or women-only services.

If a victim-survivor has needs in relation to mental health, substance misuse or offending history they can face barriers to accessing safe accommodation.

There are complex need cases with significant domestic abuse who currently are being supported via statutory services and / or referred to High Risk Adults Panel who have either not consented / or have not engaged with domestic abuse services and / or are not able to access existing safe accommodation. There are missed opportunities to engage with some of those victims and create safe space for action as many require a time intensive assertive approach/ and more specialist complex need accommodation which is not currently commissioned.

Increasingly the term bidirectional abuse is being used by professionals to describe situations where there are counter allegations, and some victims are being labelled as perpetrators as a result of this. To prevent this problem and ensuring there is appropriate risk assessment requires system change to understand what the underlying causes and issues are and understand what support needs are of those experiencing this.

Prevention

We need to strengthen the approach in relation to domestic abuse and suicide to ensure when victim suicide is suspected that perpetrators are still held to account and post-houmous charges and convictions considered.

It is essential that we address misogyny and teach young people about healthy relationships and consent.

Domestic Abuse Champions in workforce are vitally important to ensure that employees have a safe working environment and to ensure that employers, who can provide a safe haven are equipped to respond. Domestic Abuse Champion training is no longer routinely offered or available for employers.

6. Strategic Objectives

Prevention

- Balance awareness raising and targeting of services to ensure that we do not alienate victims. This particularly relates to male victims, victims from ethnically minoritized and migrant communities, disabled victims and/ or those from LGBT communities.
- Through the Tees-wide Perpetrator Strategy we will consider what support pathways are available / and or what is needed for 16 to 18-year-olds displaying perpetrator behaviour to educate them about healthy relationships and challenge behaviour before it becomes entrenched.
- Work with the Suicide Prevention Coordinator to set up a task and finish group aligned with the Suicide Prevention Strategy to increase understanding and raise

awareness and understanding of connection and risks in relation to domestic abuse and suicide.

- The Ask Me Ambassadors training would have greater reach if linked with TSAB Safe Place scheme and would create a network of locations and venues equipped to respond to ask and act if domestic abuse was disclosed.
- Domestic Abuse Champion Training needs to be commissioned so this is available across Middlesbrough Domestic Abuse Strategic Partnership Board.

Protect & Support

- The Senior Practitioner post in MACH should be full time to respond to volume of DA cases requiring screening.
- A Senior practitioner post should be created in the Adult Access Team to improve screening and ensure a domestic abuse lens when making enquiries for adults with identified care and support needs.
- A suitable space or building should be identified so Victims-Survivors in crisis can access emergency community based or homelessness prevention support in a safe confidential and accessible location
- Sustain the flexible flee fund for victims-survivors with no recourse to public funds and /or barriers to accessing safe accommodation.
- We will work with Cleveland Office Police Crime Commissioner though the Tees-wide Tackling Perpetration Strategy to understand need and demand in relation to children and adolescent parent violence and explore opportunities for collaboration and co-commissioning around pathways and specialist intervention for children.
- We will commission complex need accommodation with the specialist and therapeutic support needed to ensure it meets definition of 'safe accommodation and has a high-level staffing / supervision.
- We will negotiate a contract with approved immigration provider so victims with NRPF and /or insecure immigration status can access advice, case work and advocacy support in a timely way.
- Provide additional funding to IRIS programme so it can be responsive to increasing demand in relation to hidden victims with protected characteristics and train and provider refresher training to every GP surgery in Middlesbrough.
- Sustain arrangement with translation service.
- Sustain accessible refuge provision along with developing, retaining and increasing safe and affordable emergency and long-term accommodation and dispersal options.
- A By and For Framework Service specification will be developed which will establish a set of terms and conditions, including pricing, scope of services, and quality standards.

Partnerships

- Continue a strategic level to review governance arrangements and evaluate roles and responsibilities within MARAC to improve effectiveness ensure they are delivering what is required to embed all recommendations from a review
- Victim / Survivor Panel Engagement will be incorporated into all Domestic Abuse and Sexual Violence contracts and a financial enhancement applied to build capacity for domestic abuse and sexual violence services to continue supporting the work of Middlesbrough Survivor Panel.
- Survivors Panel will be involved in evaluation and review of services to ensure all services are meeting needs of domestic abuse victims-survivors.
- Develop internal escalation routes for raising issues of concern, particularly in relation to safeguarding victims or children living with domestic abuse. Clear single points of contact with appropriate expertise will be identified in both adults and children services.
- Adults and Children's services will work together to address risks and recommendations from Internal Audit which will in turn improve multi agency response. This needs to be regularly reviewed and ensure learning from the audit is embedded into practice across adult and children services
- A guidance document will be developed between adults and children directorates so they appropriately share data and increase understanding on thresholds for safeguarding or risk.
- An Information sharing protocol will be agreed between Cleveland Police and Domestic Abuse Strategic Partnership and arrangements made for the Middlesbrough Council analyst to have access to police system.
- Standard PPN cases will not be referred to Domestic Abuse specialist services and will instead be issued with leaflets and encouraged to self-refer which will ensure those who seek support are ready and enable Specialist DA service to focus resource on high / medium cases.
- Children's services will evaluate what evidence base practice model is going to be most effective with high levels of domestic abuse and introduce the systematic changes needed to embed a that model.
- Participate in the work of the Tees-wide Perpetration Strategy delivery plan to prevent occurrence, escalation and harm caused by Domestic Abuse perpetration and feedback performance to Middlesbrough Domestic Abuse Strategic Partnership Board.

Performance

- Where possible collaborative commissioning opportunities will be introduced.
- Agree performance monitoring framework for providers with standardised reporting and outcome monitoring tool to ensure more meaningful trend data is routinely available to inform the Middlesbrough Domestic Abuse Strategic Partnership Board.
- A central dashboard will be developed to measure progress, so performance challenge is used as a driver for change

7. Implementation

Action	Action Lead	Objective
Work needs to be undertaken with police, so they understand commissioning arrangements for Domestic Abuse Services. PPNs are being referred to DA services that are not appropriate which is causing a significant pressure on services. A system change solution needs to be identified and implemented	Cleveland Police	Protect and Support
Work is undertaken with Police representatives to ensure PPNs directed to Domestic Abuse specialist service meet criteria for service based on commissioning arrangements	Cleveland Police DA strategic lead	Protect and Support
Clear single points of contact with appropriate expertise will be identified in both adults and children services.	Adult and Children Services	Partnerships
Promotion of Sanctuary Scheme to partner agencies to ensure this and other preventive accommodation options are explored fully with victim and children rather than immediate referral to refuge.	DA strategic lead	Protect and Support
DA Analyst will develop dashboard and collate data centrally so performance reports can be provided to DASP on a quarterly basis. Work will be undertaken on CDP to ensure reports can be collated for all safe accommodation which accurately informs annual delta return	ACT Middlesbrough Analyst	Performance
Information sharing agreement will be signed off with Cleveland Police	Domestic Abuse Strategic lead	Performance
Approved Immigration advice will be arranged and contract awarded to approved provider so timely clinics and case work is available for NRPF cases within Local authority	Domestic Abuse Strategic Lead	Protect and Support
Task and Finish group established to review local need in relation to child / adolescent parent violence and abuse and explore opportunities for collaborative commissioning	Office Police Crime Commissioner	Prevention
Strategic Leads on DASP need to agree and lead system wide improvements needed to improve DA response	All	Partnerships

All DA contracts need to include detailed requirements for reporting and monitoring which is jointly developed to ensure accurate and effective contract monitoring and compliance	Commissioning	Partnerships
Children's Services will identify evidence based model and complete system changes needed	Children's Services	Partnerships
Protocol for joint working between adults and children's will be finalised and embedded across both departments	Adult and Children's services	Partnerships
Audit action plan will be reviewed and all recommendations implemented	Adult and Children's services	Partnerships
DA Leads will be identified in both adult and children services with clear escalation route for raising concerns	Adult and Children's services	Partnerships
Survivor Panel will be further developed to ensure they are involved in review of services	Domestic Abuse Strategic lead	Performance
Mapping needs to be undertaken with high-risk victims/ perpetrators to understand pathways and provision available to them	Domestic Abuse Strategic Lead	Protect and Support
Understand and evaluate role and impact of roles funded via OPCC so this is aligned with any future specifications to avoid gaps in provision	Domestic Abuse Strategic Lead Office Police Crime Commissioner	Protect and Support
Support implementation of DAPO pilot	All	Prevention
Implementation of Drive Partnership	Office Police Crime Commissioner	Partnerships
DA Coordinator will be appointed, and performance plan will be developed to coordinate work on DASP and survivor panel	Domestic Abuse Strategic lead	Performance
DA Contracts will be revised with financial enhancement for DA survivor panel work	Commissioning	Performance
MARAC governance and resource reviewed	Cleveland Police	Partnerships
By and For Framework will be commissioned	DA strategic lead Commissioning	Protect and Support
Continue to use NEPO Translation and Interpretation Framework providers for the provision of interpretation Services	Commissioning	Protect and Support
Develop Specification for Safe Accommodation Contract and	DA Strategic Lead Commissioning	Protect and Support

commission specialist provider/s to ensure we have diverse safe accommodation offer		
Work with Cleveland Police to address capacity issues re Crime Prevention which are impacting on delivery of sanctuary scheme.	Cleveland Police DA Strategic lead	Partnerships
Provide additional funding to secure continuation, and increase capacity of, IRIS scheme so additional funding can be provided to increase capacity re supporting victims and training	Commissioning	Protect and Support
Agree contract terms with approved Immigration provider/s for appointments and casework	DA Strategic Lead	Protect and Support
Specification developed for Prevention Contract and commission specialist provider/s ASK ME Ambassador DA Champion Training Work in schools and colleges	DA Strategic Lead	Prevention
Work with Tees-wide DA Perpetration Partnership to better understand the prevalence of children and adolescent parent violence and identify opportunities to improve pathways to improve pathways and commissioning of specialist CAPVA programme.	DA Strategic lead	Protect and Support
Identify location for gender informed safe space for victims- survivors at risk of homelessness due to Domestic Abuse and sexual violence	DA Strategic Lead	Protect and Support
Increase DA Senior Practitioner post in MACH to full time funded between DA Budget and Children Services	DA Strategic lead Children Services	Protect and Support
Develop Job description and approval via requisition for DA Senior practitioner post in Adult Access Safeguarding Team	DA Strategic lead	Protect and Support
Connect ASK ME and TSAB Safe Place Scheme	DA Strategic lead	Prevention
Cleveland DA -Suicide Task and finish group to improve identification and raise awareness	DA Strategic Lead	Partnerships

Flexible Flee Fund will be retained within budget following a review of financial expenditure	DA Strategic Lead	Protect and Support
Survivor Panel engagement activities will take place on a monthly basis and opportunities to identify survivors' involvement in reviewing services will be developed	DA Strategic Lead	Partnerships
Reconfigure DAPP programme and extend to align with other LA areas so collaborative commissioning can be considered via Tees-wide Perpetrator Strategy	DA Strategic Lead	Prevention
Work undertaken with mental health services to understand pathways for Domestic Abuse victims and how we can improve access to services	DA Strategic Lead Health Reps	Prevention
Tees-wide DA Perpetration Partnership to provide updates to Middlesbrough Partnership on progress across Tackling perpetration workstreams.	OPCC,	Partnerships.

8. Monitoring and review arrangements

The Strategy will be delivered through a detailed action plan which will be reviewed annually. The delivery plan which incorporates the strategic objectives and partnership actions will be overseen by the Middlesbrough Council Strategic lead management and governance provided by the Domestic Abuse Strategic Partnership with oversight by the strategic governance boards. In addition to monitoring delivery of our plan we will use a small number of focussed activity indicators to monitor our progress and to identify where we may need to make changes.

9. Evaluation

The Needs Assessment and Strategy are published on the Middlesbrough Council website. An accessible version of the Needs Assessment has also been completed and is available via website.

How will we know it has made a difference

- Victims- Survivors and their children feel safer, better protected and more satisfied with Domestic Abuse response in Middlesbrough.
- Gather feedback from victims-survivors and use this contribute to improved pathways, service design and delivery.

- Development of a dashboard will enable data to be captured and reported regularly to the Middlesbrough Domestic Abuse Strategic Partnership to provide assurance and accountability for performance.
- Increase in numbers of arrests, charges, and convictions holds perpetrators to account and ensures victim-survivors receive justice.
- Reduction in repeat incidents.
- Improved quality and timeliness of referrals, placements, interventions and outcomes for those in community based and safe accommodation.
- People will access support earlier and this will be victim led.
- DA services can manage demand more efficiently and effectively.

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Domestic Abuse - Proposed Commissioning Plan

Domestic Abuse Safe Accommodation Grant	£512,834
Public Health Grant	£416,900
Core Council Funding	£203,000
Total funding available	£1,132,734

Current Commitments

Provision	Current Budget	Comments
Integrated Protect and Support Service	£229,112	This contract is currently awarded to My Sisters Place and incorporates Referral and Response, IDVAs, Support workers, Sanctuary scheme, domestic abuse counselling, temporary accommodation navigator and community-based programmes, such as Freedom programme
IDVA Independent Domestic Violence Advocate	£100,073	
Navigator Temporary Accommodation Role	£36,506	
Referral & Response	£25,619	
Domestic Abuse Training	£9,738	
ASK ME Ambassador Programme	£25,624	
IRIS Scheme	£25,769	This contract is currently awarded to My Sisters Place Contract Value is to be increased to £89,769 from 1.4.25-30.9.26. The increase of £64,000 is to be funded from non-recurrent Changing Futures grant and Mayors Priority Funding
Children and Young Persons Service	£86,272	This contract is currently awarded to My Sisters Place and comprises of therapeutic work with children experiencing domestic abuse and children and young person's IDVA
Middlesbrough Refuge	£202,290	This contract is currently awarded to Changing Lives. Refuge is purpose built and is owned by North Star Housing. Budget also includes £7,483 for out of hours support
Dispersed Scheme	£26,398	This contract is currently awarded to Harbour and funds x 2 part time roles working with adult victims and their children in six dispersed properties
Semi Independent Move on scheme	£61,389	This contract is currently awarded to Harbour and should fund two roles working with adult victims and their children in 8 dispersed properties
Flexible Flee Fund	£50,000	This is a fund created as part of DA Budget and used to fund refuge placements for those in and out of area with barriers to accessing safe accommodation

Perpetrator Programme	£58,487	This contract is currently awarded to Harbour. This will be extended for two years but funding will be reduced by £25,000 as the Ministry of Justice has funded drive partnership which will focus on work with high-risk perpetrators so demand for this service will reduce even further
Sexual Violence Counselling Service	£30,000	This contract is currently awarded to ARCH
By and For Framework	£30,000	This contract will be awarded in 2025
Immigration Advice	£65,000	This contract will be awarded in 2025
Staffing Costs	£53,700	
Interpreting Costs	£11,757	
DA Survivor support costs	£5,000	
TOTAL	£1,132,734	

Proposal

Provision	Value	Comments
Integrated Protect and Support Service	£495,734	This will incorporate IDVAS, DA Counselling for adults and children, Support workers
Safe Accommodation Service	£353,300	This will incorporate Refuge Complex need Semi-independent / Move on Dispersed Properties Sanctuary
Prevention Service	£50,000	This will incorporate Community Ambassador Programme Work in schools and colleges Employee Engagement
SV service	£50,000	This will be extended and value of contract increased due to rising demand for service.
By and For Framework	£30,000	This contract will be awarded in 2025
Immigration Advice	£25,000	This contract will be awarded in 2025
IRIS Service	£30,000	This contract will be extended and varied
DAPP Programme	£30,000	This will be extended, and contract revised with reduced value
Flexible Flee Fund	£15,000	This will continue but overall spend should reduce with procurement of specialist immigration advice
Staffing Costs	£53,700	
Total	£1,132,734	



Middlesbrough Domestic Abuse Needs Assessment – Executive Summary

June 2025

1. EXECUTIVE SUMMARY

The needs assessment aims to understand the nature and prevalence of domestic abuse in Middlesbrough. It will be used to inform the development of revised Middlesbrough Domestic abuse Strategy and provision and commissioning of domestic abuse services from April 2026.

Domestic Abuse is a cross-cutting theme and effective protection, support and prevention is reliant on maintaining a robust system wide partnership across Middlesbrough. The data used in the report was extracted from case load management systems and regulatory statutory data returns, published nationally and locally.

2. IMPACT OF DOMESTIC ABUSE

Domestic abuse has significant impact on victims and their children. The impact of domestic abuse can be exacerbated by pre-existing inequalities. There are also wider societal costs. The Home Office estimates that domestic abuse has an economic and social cost of around £81 billion in England and Wales each year.

DOMESTIC ABUSE DATA FROM INCIDENT TO CONVICTION, ENGLAND AND WALES, YEAR ENDING MARCH 2024 (ONS)

2,307,000 = Estimated number of victims of domestic abuse, in the 12 months to the 31st of March 2024, based on the Crime Survey of England and Wales – published by the Office for National Statistics.

851,062 = The number of domestic abuse flagged offences, recorded by the police in England and Wales, in the 12 months to the 31st of March 2024, as collected by the Home Office.

72,641 = The number of suspects of domestic abuse related offences referred to the CPS by the police in the 12 months to the 31st of March 2024, for charging decision.

49,046 = The number of suspects charged by the Crown Prosecution Services in Domestic Abuse Related cases, in the 12 months to the 31st of March 2024.

38,776 = Offenders were convicted in the 12 months to 31st March 2024.

3. STRENGTHS

- Budget is well spent and delivers a range of services, with victims, children and young people and perpetrators.
- Well-rounded service offer with good robust support.
- Flexible approach, empathetic and trauma informed.
- Integrated Specialist DA service
- Expertise in the Violence against women and girls' sector, bringing a wealth of knowledge, experience, and a holistic approach.
- Chief Executive Officer of Specialist services respond to issues as they arise investing in training and support for their staff.
- Highly skilled and experienced Independent Domestic Violence Advocates with specialisms
- The IRIS service has delivered support to victims who had not previously disclosed, many of those with has upskilled both clinical and non-clinical staff in Primary Care in Middlesbrough.
- Domestic Abuse Counselling and trauma informed therapeutic interventions for adults, children, and young people.
- Investment in Prevention work training over Ask Me Ambassadors in communities.
- Additional Investment in Sanctuary Scheme will prevent homelessness.
- Proactive Domestic Abuse Strategic Lead
- Established Domestic Abuse Strategic Partnership
- Victim / Survivor Voice satisfaction with services commissioned.
- Survivor Panel is established in collaboration with specialist providers.
- Investment in mandatory Domestic Abuse training which has been delivered to adult and children social care staff and increased awareness and understanding.
- Investment in Domestic Abuse Navigator post in specialist service funded to work with those placed in emergency interim / complex need.
- Intensive and trauma informed level of support for victims and their children placed in refuge creating a supportive and nurturing environment not only for the victims and children, but also the staff.
- Investment in increasing Dispersed options for those unable to access refuge and those ready for move on/ semi-independent living.
- Robust referral pathways & partnership working between Housing Solutions / Community interventions and DA Specialist Providers and new Domestic Abuse /Housing specific roles to improve homeless prevention offer.
- Flexible Flee Fund created and administrated Local authority for no recourse to public funds barriers to access refuge in and out of area.
- Translation service funded for all domestic abuse commissioned services.

4. NEEDS

- Increase capacity to meet services demands for victims/survivors beyond initial crisis.
- More resources and High intensity pathway for high-risk victims so Independent domestic violence advocates can effectively case manage.
- Volume and demand due to increasing number of police Public Protection notice passed to Domestic abuse services continues to impact on their ability to deliver contracts need to review and negotiate arrangements in relation to police referrals in line with new statutory guidance for IDVAS.
- Increase funding for Parenting support, including dedicated roles, and funding for practical support re childcare / access to funding re transport.
- Increasing numbers of victims presenting with insecure immigration status and no recourse to public funds disparity in relation to support provided in statutory services.
- Strengthen work with protected characteristics, ensuring we have mapped all services, sourced training for partnership, prevention work is embedded and helped support smaller organisations and groups to improve their offer and provide tailored support.
- High rate of homeless presentations due to Domestic Abuse and there is not sufficient safe and appropriate accommodation to place those in emergency and housing crisis impacting on time it takes to rehouse victims.
- Cleveland Marac is not effective in reducing risk. The process is not robust and does not provide effective safety planning. Cleveland Police and statutory partners need to revisit Marac governance arrangements and complete job evaluation of roles and responsibilities to ensure they are delivering what is required to embed all recommendations from review.
- Considerable proportion of victims experience mental health problems but find the pathways for professional help difficult to navigate.
- There is not a safe or trauma informed space for victims to present if they require emergency accommodation / and or needs to access ongoing support re homelessness.
- Strategic commitment and participation from all statutory providers in Domestic Abuse strategic partnership is inconsistent.
- Early intervention for children and young people with a greater focus on working with children who are exhibiting early signs of problematic behaviour especially within intimate relationships or towards their parents.
- Increasing numbers of 16–18-year-olds identified who at risk of abusive attitudes and behaviours towards parents, other family members and in intimate relationships.
- Referrals, engagement, and successful completions on Domestic Abuse Perpetrator Programme is disproportionately low.
- Strengthen multi agency working and how statutory agencies work together, and address risk and recommendations identified in internal audit including developing a joint working protocol between children and adult services.
- Consistent and good quality Domestic Abuse training needs to be made available across partnership and prevention work delivered across all communities.

- More proactive outreach DA support with opportunities for co working between statutory services such as adult social care and children's.
- Funding allocation for DA Children and Young Person service is insufficient to adequately support the growing number of children affected by domestic abuse.
- Children social care and expectations within protection plans. Victim not ready to engage time but time intensive for Domestic Service as time spent trying to engage service but not in safe space for action. Lack of consistency & effectiveness.
- Increasing number of victims presenting with insecure immigration status and / or no recourse to public funds but there are significant delays in being able to arrange immigration advice which impacts on timeliness of migrant victim concession applications / and or decision making regarding statutory duties.
- Increasing number of co dependant individuals with overlapping problems such as homelessness and substance misuse and contact with criminal justice system are identified as experiencing bidirectional abuse.
- Need to identify suitable trauma /gender informed location to see victims/survivors experiencing homelessness.
- Trauma Informed Emergency crash pads for single person, families, and male victims.
- Criminal justice system and significant delays fails to support victims and impacting on resource and capacity for IDVA support.

5. RECOMMENDATIONS

Protect and Support specification will be developed and commissioned as one contract which will incorporate adult and children's community-based provision into one contract. This will sustain single point of access for all Middlesbrough Domestic Abuse services. This will include provision for expertise in police control room, referral, and response, IDVA support including roles specifically tailored for Mental health, children and young person, DA and Stalking and male victim support, Domestic Abuse Support workers, Adult and Children Counselling, CAPVA and family work.

Safe Accommodation specification (24-hour response, Sanctuary Refuge Dispersed and Semi Independent/ Move on Accommodation and complex need provision will be commissioned as one integrated contract.

Domestic Abuse Prevention specification will be developed and commissioned as one contract which will incorporate delivery of programmes in schools, Community Champion ideally ASK ME ambassador programmes and Domestic Abuse Champion Training for professionals.

By and For Service Framework specification will be developed which will establish a set of terms and conditions, including pricing, scope of services, and quality standards, which will be agreed upon in advance with suppliers of By and for services. Funding will be assigned this to ensure there is a mechanism for Local authority departments to access interventions and services on a case-by-case basis.

DA Senior Practitioner hours in Multi Agency children hub should be increased to F/T on a permanent basis. A further F/T post will be developed in Adult access and safeguarding to support and embed good practice in enquiry and assessments for vulnerable adults with care and support needs.

Marac funding will be set aside to support Cleveland Police along with other statutory partners to sustain Marac administration, coordination, and improved chair arrangements but

A suitable safe space or building needs to be identified so Domestic abuse housing appointments and emergency interventions can be offered in a safe confidential and accessible location.

Translation Service contract should be extended.

Sustain Flexible Flee fund with local authority administering this.

Tender for Approved immigration provider to deliver advice for victims/ survivors and their children who present to local authority in financial hardship or experiencing housing / homeless issues with no recourse to public fund so appointments and casework advice.

Domestic Abuse Perpetrator Programme will be reconfigured and extended until formal agreement reached as per statutory duties set out in Victims Bill

IRIS contract will be extended with existing provider to sustain provision until formal agreement reached as per statutory duties set out in Victims Bill.

Through the Tees Perpetrating Abuse Strategy **develop a service specification and/ or support route for 16 to 18-year-olds** displaying perpetrator behaviour to educate them about healthy relationships and challenge behaviour before it becomes entrenched.

Through the Tees Perpetrating Abuse Strategy need to complete analysis in relation to those identified as experiencing **Bi-Directional Abuse/ Counter allegations** to understand system change needed and how risk is going to be assessed and managed in relation to this

Victim / Survivor Voice Engagement will be incorporated into all DA and SV contracts and a financial enhancement applied to contracts to build capacity for domestic abuse and sexual violence services to continue supporting this work via their own services and Middlesbrough Survivor Panel.

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Appendix 4

Subject of assessment:	Domestic Abuse Strategy 2025-2028			
Coverage:	Overarching across Middlesbrough wards.			
This is a decision relating to:	☒ Strategy	☐ Policy	☐ Service	☐ Function
	☐ Process/procedure	☐ Programme	☐ Project	☐ Review
	☐ Organisational change	☐ Other (please state)		
It is a:	New approach:	☐	Revision of an existing approach:	☒
It is driven by:	Legislation:	☒	Local or corporate requirements:	☐
Description:	Key aims, objectives and activities Middlesbrough The purpose of this EIA is to assess the impact of Domestic Abuse Strategy which will be published December 2025 and review the effectiveness of proposed changes to mitigate impact. The Middlesbrough Domestic Abuse Strategy sets out how Middlesbrough Domestic Abuse Strategic Partnership will tackle domestic abuse over the next three years. It aims to strengthen response and deliver on key strategic objectives in relation to preventing domestic abuse, prioritising emergency and long-term support for victims-survivors and their children and developing a whole system response with an informed workforce across the partnership. This strategy sits alongside other multiple strategies and related policies and encompasses a DA Needs assessment and audit and review learning and recommendations. Statutory drivers The Domestic Abuse Act 2021 created statutory duties on Local Authorities, to assess the need for, prepare and publish strategies for providing accommodation-based support to victims and their children in safe accommodation. Differences from any previous approach The Needs Assessment has identified a need to recommission and reconfigure all Domestic Abuse provision to ensure priority areas are appropriately resourced to align with needs and there are clear pathways for victims and survivors to access either community-based support and / or safe accommodation. Key stakeholders and intended beneficiaries (internal and external as appropriate) Victims-survivors and their children, professionals who work with them, DA Specialist services, Police, Health, Substance Misuse Services, Housing. Intended outcomes. Victims- Survivors and their children feel safer, better protected and more satisfied with Domestic Abuse response in Middlesbrough. Gather feedback from victims-survivors and use this to contribute to improved pathways, service design and delivery. Service users and their children being able to access help from specialist staff in domestic abuse support services.			
Live date:	December 2025			
Lifespan:	2025- 2028			
Date of next review:	September 2028			

Screening questions	Response			Evidence
	No	Yes	Uncertain	
Human Rights Could the decision impact negatively on individual Human Rights as enshrined in UK legislation?	☒	☐	☐	The Strategy is relevant to The right to respect for private and family life, home and correspondence (Article 8) Qualified right. Neither this nor any of the other absolute or qualified rights will be infringed by these proposals. Evidence used to inform this assessment includes the Domestic Abuse Needs Assessment. The needs assessment has been consulted on extensively with the Domestic Abuse Strategic Partnership Board statutory and non-statutory stakeholders, commissioning bodies, staff and victims and survivors via surveys, and group consultation via Middlesbrough survivor panel.

* Consult the Impact Assessment further guidance for details on the issues covered by each of theses broad questions prior to completion.

Screening questions	Response			Evidence
Equality Could the decision result in adverse differential impacts on groups or individuals with characteristics protected in UK equality law? Could the decision impact differently on other commonly disadvantaged groups?	☒	☐	☐	The Public Sector Equality Duty (PSED) requires that when exercising its functions the Council must have due regard to the need to: - - eliminate discrimination, harassment, victimisation, and any other conduct that is prohibited by or under this Act. - advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and - foster good relations between persons who share a relevant protected characteristic and persons who do not share it. In having due regard to the need to advance equality of opportunity, the Council must consider, as part of a single equality duty: - removing or minimising disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic. - taking steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of people who do not share it; and - encouraging people who share a protected characteristic to participate in public life or in any other activity in which participation is low. Domestic abuse can affect anyone. The strategy and associated objectives and activities are designed to meet the legitimate and particular considerations of Age, Disability, Gender Reassignment, Marriage and Civil partnership Race, Religion or belief, Sex, sexual orientation, pregnancy and maternity. The strategy is also designed to ensure needs are met where they may differ because someone holds one or more protected characteristics. It identifies that certain protected characteristics are disproportionately affected by domestic abuse. The strategy and supporting commissioning plan reflects this and includes: - Investment in support and improving pathways for male victims. Independent Domestic Violence Advisors support and safe accommodation provision is included - Funding for the IRIS programme which works with victims who are often hidden from DA specialist services due to protected characteristics such as Disability, Older victims, pregnancy and race - Dedicated Children and Young people IDVA and Therapeutic service - By and For Framework for protected characteristics which will develop an approved provider framework so specialist by and for services can receive funding for their work and victim have increased choice regarding service they access - Funding for immigration advice for victims and their children with insecure immigration status or no recourse to public funds to reduce impact of homelessness/ financial destitution - Funding for translator service across all commissioned services to increase accessibility Given the above there are no concerns that implementation of the strategy could impact adversely on a group or individuals because they hold one or more protected characteristics. Evidence used to inform this assessment includes the Domestic Abuse Needs Assessment. The needs assessment has been consulted on extensively with the Domestic Abuse Strategic Partnership Board statutory and non-statutory stakeholders, commissioning bodies, staff and victims and survivors via surveys, and group consultation via Middlesbrough survivor panel.

Screening questions	Response			Evidence
Community cohesion Could the decision impact negatively on relationships between different groups, communities of interest or neighbourhoods within the town?*	☒	☐	☐	The strategy has set out strategic objectives in relation to funding prevention work by training community ambassadors and champions in local communities and workplaces to be able to recognise and respond to domestic abuse. Successfully implementing the Strategy will have a positive impact on communities of interest and communities of place by raising awareness of domestic abuse, the support available and includes engagement with community leaders and identification of community work to raise awareness of the unacceptable nature of domestic abuse. Given the above there are no concerns that implementation of the strategy could impact adversely on a group or individuals because they hold one or more protected characteristics. Evidence used to inform this assessment includes the Domestic Abuse Needs Assessment. The needs assessment has been consulted on extensively with the Domestic Abuse Strategic Partnership Board statutory and non-statutory stakeholders, commissioning bodies, staff and victims and survivors via surveys, and group consultation via Middlesbrough survivor panel.
Armed Forces Could the decision impact negatively on those who are currently members of the armed forces of former members in the areas of Council delivered healthcare, compulsory education and housing policies?*	☒	☐	☐	There are no concerns that this strategy could adversely impact on current or former members of the Armed Forces. Evidence used to inform this assessment includes the Domestic Abuse Needs Assessment. The needs assessment has been consulted on extensively with the Domestic Abuse Strategic Partnership Board statutory and non-statutory stakeholders, commissioning bodies, staff and victims and survivors via surveys, and group consultation via Middlesbrough survivor panel.
Care leavers Could the decision impact negatively on those who are care experienced?*	☒	☐	☐	There are no concerns that implementation of the strategy could adversely impact on care leavers. Evidence used to inform this assessment includes the Domestic Abuse Needs Assessment. The needs assessment has been consulted on extensively with the Domestic Abuse Strategic Partnership Board statutory and non-statutory stakeholders, commissioning bodies, staff and victims and survivors via surveys, and group consultation via Middlesbrough survivor panel.
Reducing Poverty Could the decision impact negatively on the Council's ambitions to reduce poverty in the town?	☒	☐	☐	Successful delivery of the strategy will positively impact on the Council's ambitions to reduce poverty. Domestic abuse is one of the main causes of homelessness in Middlesbrough, with a high incidence of repeat homelessness on the same grounds. The needs assessment on which the strategy is based, identifies this and the strategy includes actions to reduce the likelihood of victims becoming homeless and being impoverished and therefore positively impacts this area. Evidence used to inform this assessment includes the Domestic Abuse Needs Assessment. The needs assessment has been consulted on extensively with the Domestic Abuse Strategic Partnership Board statutory and non-statutory stakeholders, commissioning bodies, staff and victims and survivors via surveys, and group consultation via Middlesbrough survivor panel.

Assessment completed by:	Claire Moore	Head of Service:	Ruth Musicka
Date:	6/11/2025	Date:	7/11/2025

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MIDDLESBROUGH COUNCIL	
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Report of:	Andrew Humble - Director of Finance and Transformation (s151 Officer)
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Relevant Executive Member:	Cllr Nicky Walker - Executive Member for Finance
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Submitted to:	Executive
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Date:	3 December 2025
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Title:	Revenue and Capital Budget – Forecast Year-end Outturn position at Quarter Two 2025/26
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Report for:	Decision
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Status:	Public
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Council Plan priority:	All
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Key decision:	Yes
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Why:	Decision(s) will incur expenditure or savings above £250,000 and have a significant impact in two or more wards
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Subject to call in?	Yes
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Why:	Non-Urgent Report
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Proposed decision(s)	
That Executive: • APPROVES budget virements over £250,000 within the revenue budget (Appendix 1). • APPROVES budget virements over £250,000 within the Capital Programme (paragraph 4.47). • APPROVES the inclusion of new schemes and additions to existing schemes to the Capital Programme totalling £0.519m for 2025/26, of which £0.454m are externally funded and £0.065m is from existing Council funded resources (detailed in Appendix 5). Subject to approval this will increase the approved 2025/26 Capital Programme budget to £88.094m. • NOTES the Council's financial performance and forecast year-end financial outturns for revenue and capital budgets for the financial year 2025/26 as at Quarter Two, highlighting the budget pressures and the forecast year-end position if no further action is taken. At present, the revenue budget is forecast to be under pressure by £1.804m (1.3%) at year end after the proposed use of central contingences and other budgets. • NOTES that Directors have submitted recovery plans and mitigations aimed at reducing their forecast budget pressures and acknowledges the ongoing requirement for Directors to continue refining and implementing these plans to achieve a balanced	

budget for the Directorates by the end of 2025/26. In support of this corporate revenue budget spending controls will continue to be applied during 2025/26.

Executive summary

This report advises the Executive of the Council's forecast year-end financial outturn as at Quarter Two 2025/26 and seeks approval of budget virements within the revenue budget and revisions to the capital programme in relation to activity in Quarter Two.

It is important to note that this report reflects forecast budget pressures at year end if no further mitigating actions are taken. The financial pressures outlined will only materialise if recovery plans and other actions are not successfully implemented.

The report enables the Executive to discharge its financial management responsibilities by setting out the following position at Quarter Two (30 September 2025):

- General Fund Revenue Budget forecast outturn.
- virements.
- statement of the Council's reserves and provisions.
- Capital Programme forecast outturn.
- statement of the Council's borrowing and prudential indicators.
- statement of the level of debt owed to and to be recovered by the Council.
- actions that have been taken and are planned to be taken in order address the issues identified.

The forecast position at Quarter Two represents a significant improvement compared to Quarter One, when the forecast year-end budget pressure was estimated at £4.482m after the proposed use of contingencies. This improvement reflects the impact of actions already implemented and ongoing work to reduce financial pressures across Directorates.

The main highlights of the report are:

- the 2025/26 revenue budget forecast year-end outturn at Quarter Two indicates a projected budget pressure of £7.813m across Directorates and Central budgets. In line with the financial strategy, provisions have been made to mitigate this position through the planned use of central contingencies and other budgets totalling £6.009m. This approach, which includes offsetting pressures such as unachieved savings, is expected to reduce the **budget pressure to £1.804m (1.3%) by the year end** (see Table 1 in paragraph 4.10).
- the main areas of budget pressure remain within Children's and Adult Social Care, Environment and Community Services (including Bereavement Services, Fleet Services, and School Catering), and Strategic Commercial Properties (paragraphs 4.16 to 4.31). In some cases, these pressures are driven by under-achievement of income targets as well as increased expenditure. Directors have submitted recovery plans and mitigations aimed at reducing their forecast pressures, and there is an ongoing requirement for them to continue to refine and implement these plans to work towards achieving a balanced budget for their Directorate by the end of 2025/26. In support of this, corporate revenue budget spending controls will continue to be applied throughout 2025/26 to help manage financial pressures and reinforce budget discipline.
- the forecast year-end position includes **£7.085m of net savings currently forecast as undeliverable in 2025/26** (Table 2 and Appendix 2).

- the 2025/26 budgets and commitments against the central Corporate Contingency budget and Change Fund (paragraph 4.32 and Table 3)
- **forecast total usable unrestricted revenue reserves on 31 March 2026 of £25.808m** (Table 4 and Appendix 3). This is in line with that recommended by the Director of Finance and Transformation in the Reserves Policy for 2025/26 approved by Council on 19 February 2025 to rebuild the Council's financial resilience.
- **the forecast deficit of £9m for 2025/26 on the Dedicated School Grant**, increasing the **forecast cumulative deficit to £31.213m on 31 March 2026** (Table 5). This is a major risk as whilst the statutory override (which instructs Councils to account for the DSG deficits in a separate reserve and not to fund it by using its General Fund resources) has been extended recently it is due to end on 31 March 2028. The DSG recovery actions and risks to the Council's financial resilience are detailed in Appendix 4.
- the **addition of £0.519m for new schemes and additions to existing schemes (externally and Council funded) to the Capital Programme in 2025/26** creating a revised budget of £88.094m for 2025/26 (paragraphs 4.45 and 4.51 and Appendix 5).
- **the 2025/26 Capital Programme forecast year-end outturn of £67.144m** which is a reduction of £20.950m from the revised £88.094m budget (Table 6). This is largely due to slippage of planned expenditure from 2025/26 into 2026/27 and future years (Appendix 6).
- that **£6.132m of qualifying revenue expenditure is planned to be funded from Flexible Use of Capital Receipts (FUoCR) for Transformation in 2025/26** in accordance with the FUoCR strategy for 2025/26 approved by Council on 26 March 2025 (paragraph 4.52 to 4.57 and Appendix 7).
- the level of Debtors as at 30 September 2025 (Table 8).

1. Purpose of this report and its contribution to the achievement of the Council Plan ambitions

- 1.1 The report discharges the responsibilities of the Executive to manage and control the revenue budget, capital programme, and overall balance sheet position of the Council.

Our ambitions	Summary of how this report will support delivery of these ambitions and the underpinning aims
A successful and ambitious town	This report covers both the revenue budget and capital programme of the Council and as a result it supports all the ambitions within the Council Plan.
A healthy Place	
Safe and resilient communities	

Delivering best value	The proposed recommendations are consistent with and will promote the achievement of the Council's general legal duty to achieve Best Value in accordance with Section 3 of the Local Government Act 1999 (as amended by s137 of the Local Government & Public Involvement in Health Act 2007). The report provides assurance that the Council has effective corporate governance arrangements in place, and that the Council is attempting to manage its finances within the budget approved by Council for 2025/26 and ensures that the Medium-Term Financial Plan to restore financial resilience and sustainability is not impacted.
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2. Recommendations

2.1 That Executive:

- **APPROVES** budget virements over £250,000 within the revenue budget (Appendix 1).
- **APPROVES** budget virements over £250,000 within the Capital Programme (paragraph 4.47).
- **APPROVES** the inclusion of new schemes and additions to existing schemes to the Capital Programme totalling £0.519m for 2025/26, of which £0.454m are externally funded and £0.065m is from existing Council funded resources (detailed in Appendix 5). Subject to approval this will increase the approved 2025/26 Capital Programme budget to £88.094m.
- **NOTES** the Council's financial performance and forecast year-end financial outturns for revenue and capital budgets for the financial year 2025/26 as at Quarter Two, highlighting the budget pressures and the forecast year-end position if no further action is taken. At present, the revenue budget is forecast to be under pressure by **£1.804m (1.3%)** at year end after the proposed use of central contingences and other budgets.
- **NOTES** that Directors have submitted recovery plans and mitigations aimed at reducing their forecast budget pressures and acknowledges the ongoing requirement for Directors to continue refining and implementing these plans to achieve a balanced budget for the Directorates by the end of 2025/26. In support of this corporate revenue budget spending controls will continue to be applied during 2025/26.

3. Rationale for the recommended decision(s)

- 3.1 To enable the effective management of finances, in line with the Council's Local Code of Corporate Governance, the Scheme of Delegation and financial regulations.

4. Background and relevant information

- 4.1 The Council's Scheme of Delegation gives the Executive collective responsibility for corporate strategic performance and financial management, monitoring and control. Standing Orders and Financial Procedures require the Executive's approval for major

virements between revenue budgets, and in-year changes to the Council's Capital Programme within approved Council resources within the approved policy framework.

- 4.2 This report enables the Executive to discharge its financial management responsibilities by setting out the Council's financial position at Quarter Two 2025/26.
- 4.3 Financial Procedure Rule 18.38.3 of the Council's constitution requires the Executive's approval of revenue and capital programme budget virements over £250,000.
- 4.4 Financial Procedure Rule 18.80.2 requires approval by Executive of the write off of debt over financial thresholds set out in the Financial Limits Annex of the Council's Constitution, there are none for the purpose of the Quarter Two report.
- 4.5 The forecasts within this budget monitoring report as of 31 March 2026 have been prepared using the following major assumptions:
- all known staffing changes have been captured.
 - agreed pay award of 3.2% for local government officers for 2025/26 included.
 - income and expenditure forecasts have been prepared in conjunction with budget holders using the best information currently available.
 - forecast assume that current conditions and service delivery arrangements remain unchanged through to year-end, providing a prudent basis for monitoring and decision-making.

Revenue Budget

- 4.6 The 2025/26 Revenue Budget, Medium Term Financial Plan 2025/26 to 2028/29, and Council Tax report to Council on 19 February 2025 set out the future financial position of the Council. Both this report and that report should be read together to fully understand the context within which the Council is operating and the financial challenges that it faces.
- 4.7 As part of that report a net revenue budget for 2025/26 of £143.304m was approved by Full Council. Within the report the Director of Finance and Transformation (S151 Officer) issued his Section 25 Report to Council Members which set out the basis upon which the revenue budget was considered to be robust and the basis upon which reserves were considered adequate.
- 4.8 While the Council has achieved significant improvement in its financial position from that which existed at the start of the 2024/25 financial year, there is still a need to control expenditure within the approved 2025/26 budget whilst developing further savings and income generating opportunities through the Recover, Reset, Deliver Transformation Portfolio in order to balance the MTFP and stabilise the Council's financial position and rebuild its financial resilience. This requires the delivery of all approved 2025/26 savings plans in full. Budgetary control measures as detailed in the 2024/25 Revenue and Capital Outturn report to Executive on 11 June 2025 will continue to be implemented during 2025/26.
- 4.9 Table 1 below summarises the overall position per Directorate and shows that the 2025/26 forecast year-end outturn as of 30 September 2025 (Quarter Two) is a

forecast budget pressure of £7.813m (5.01%) against the approved budget of £143.304m before the use of central contingencies and other central budgets. It is important to note that this reflects forecast pressures at year end if no further mitigating actions are taken. These pressures will only materialise if recovery plans and other actions are not successfully implemented. The Quarter Two forecast represents a significant improvement compared to Quarter One, when the forecast year-end budget pressure was estimated at £10.677m before the use of central contingencies and other central budgets. This improvement reflects the impact of actions already implemented and ongoing work to reduce financial pressures across Directorates.

4.10 As shown at the bottom of Table 1, the 2025/26 revenue budget forecast year-end outturn at Quarter Two indicates a forecast budget pressure of £7.813m across Directorates and Central budgets. In line with the financial strategy, provisions have been made to mitigate this position through the planned use of central contingencies and other central budgets totalling £6.009m. This approach, which includes offsetting pressures such as unachieved savings, is expected to reduce the forecast budget pressure to £1.804m (1.3%) by year end, which is a significant improvement from the Quarter One position of £4.482m. While these resources have been set aside for this purpose, their use would significantly reduce the remaining central contingencies available for the rest of 2025/26. It therefore remains essential that Directorates continue to make every effort to reduce their forecast budget pressures and deliver a balanced budget by year end.

Table 1 – Summary of Net Revenue Budget Forecast Outturn 2025/26 at Quarter Two

Directorate	Current Full Year Budget	Forecast Outturn	Forecast Outturn Variance	Financial Recovery Plan	MEMO FORECAST VARIANCE SPLIT		Movement from Quarter One
					Savings Delivery Variance	Other variances	
	£m	£m	£m	£m	£m	£m	£m
			Adv /(Fav)	Adv /(Fav)	Adv /(Fav)	Adv /(Fav)	Adv /(Fav)
Adult Social Care	56.597	58.234	1.637	0.000	0.191	1.446	0.139
Public Health	0.086	0.086	(0.000)	0.000	0.000	(0.000)	(0.000)
Children's Care	57.700	65.704	8.004	(0.200)	3.833	4.171	1.332
Education & Partnerships	6.798	7.267	0.469	0.000	0.345	0.124	0.042
Regeneration	3.176	3.401	0.225	0.000	0.375	(0.150)	0.024
Environment & Communities	21.972	22.894	0.922	0.000	0.393	0.529	(0.976)
Legal & Governance	12.079	11.827	(0.252)	0.000	0.000	(0.252)	(0.189)
Finance	4.374	3.636	(0.738)	0.000	0.000	(0.738)	0.101
Chief Executive	0.259	0.259	0.000	0.000	0.000	0.000	0.000
Total Directorates	163.041	173.308	10.267	(0.200)	5.137	5.130	0.473
Central Budgets	(19.737)	(22.191)	(2.454)	0.000	1.948	(4.402)	(3.337)
Total	143.304	151.117	7.813	(0.200)	7.085	0.728	(2.864)

Proposed use of central contingencies and other budgets to reduce forecast overspend

	£m	£m
Savings Delivery Risk Budget held centrally	(2.000)	0.000
Inflation & Growth held centrally	(0.206)	(0.206)
Corporate Contingency Budget	(0.482)	0.568
Middlesbrough Priorities Fund	(2.846)	(0.701)
Pay & Prices Contingency - amount remaining after use for agreed 3.2% pay award for 2025/26	(0.475)	0.525

Remaining forecast outturn variance	1.804	(2.678)
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4.11 A summary of the main variances for each Directorate is included in paragraphs 4.16 to 4.31 including any recovery plans proposed by Directorates. Table 1 also includes a split of the forecast outturn variance between those due to potential non-delivery of required budget savings (detailed in paragraphs 4.12 to 4.15 and Appendix 2), and other variances.

Budget Savings Delivery

- 4.12 The budget for 2025/26 is predicated on the delivery of £11.626m in savings, comprising £6.786m of new savings and £4.840m of savings previously approved in 2024/25. The revised new savings figure reflects the proposed removal of £0.250m, which will be formally taken out of the Council's budget as part of the 2026/27 budget setting process. In the interim, a temporary virement has been approved, and the removal of these savings will be funded from the Corporate Contingency budget in 2025/26, as shown in Table 3.
- 4.13 In addition to these new budget savings required there was also a total of £2.291m of previous savings which were not fully achieved during 2024/25 and are remaining to be achieved in 2025/26. This makes a total of £13.917m of savings which are required to be achieved in 2025/26.
- 4.14 Table 2 provides a summary of projected delivery performance against savings required in 2025/26. Further detail on savings currently unachievable is included in Appendix 2. All identified savings will be subject to ongoing monitoring through the monthly Budget Challenge sessions with Directorates and will be reported through this report. In addition, savings linked to transformational and corporate projects will continue to be overseen via the Directorate Performance Boards.
- 4.15 Any forecast unachieved savings in 2025/26 are required to be achieved in full or replaced fully with alternative approved savings in future years otherwise this will have a negative impact on the Council's MTFP. Any savings that are deemed unachievable permanently will need to be submitted for Council approval to remove in the 2026/27 budget setting, and this will only be approved if finances allow.

Table 2 – Savings Programme Assurance Summary for 2025/26 by Directorate

Directorate	2025/26 Budgeted Savings Target £m	2025/26 Forecast Savings Achieved £m	2025/26 Savings (over) / under achieved £m
Adult Social Care	(2.733)	(2.542)	0.191
Children's Care	(4.112)	(0.279)	3.833
Education & Partnerships	(0.359)	(0.014)	0.345
Regeneration	(1.394)	(1.019)	0.375
Environment & Communities	(1.790)	(1.397)	0.393
Legal & Governance	(0.367)	(0.367)	-
Finance	(0.395)	(0.395)	-
Central	(2.767)	(0.819)	1.948
	(13.917)	(6.832)	7.085

Directorate main variances

- 4.16 The explanations for Directorate major variances and current proposed mitigations, where appropriate, which have been agreed with Directorates following the Member led Budget Clinics, are summarised below.
- 4.17 Directors have submitted financial recovery plans and mitigations aimed at reducing their year-end forecast budget pressures, which reflects the position if no further actions are taken. There remains an ongoing requirement for these plans to be refined and fully implemented to support the achievement of a balanced budget for each Directorate by the end of 2025/26. Corporate revenue budget spending controls will continue to be applied throughout 2025/26 to reinforce financial discipline. An update on the progress of Directorate financial recovery plans and associated mitigations will be provided in the Quarter Three budget monitoring report.
- 4.18 In developing the financial recovery plans, Directors considered actions that would not only address in-year budget pressures but also tackle recurring issues likely to impact the Medium-Term Financial Plan (MTFP). For the purposes of this report, the focus is on the short-term measures identified for implementation that are expected to have an immediate impact on the 2025/26 forecast position. While these measures may not fully eliminate financial pressures, particularly given the demand-led nature of many cost drivers, the implementation of robust financial controls remains critical. Strengthening financial governance fosters a culture of accountability and informed decision-making. Through constructive challenge and scrutiny, these controls help ensure that resources are used efficiently, value for money is achieved, and all viable options are considered before financial commitments are made. This approach underpins financial resilience and supports improved outcomes for communities through transparent and responsible service delivery.
- 4.19 A range of core financial controls are already in place across all departments and are being actively reinforced to support the financial recovery strategy. These include delegated authority for spending approvals, regular budget monitoring, demand management planning, procurement oversight, panel reviews for high-cost services, particularly in Children's and Adults social care, income and cost tracking, and close collaboration with Finance Business Partners. Strengthening the consistent application of these controls is key to maintaining financial discipline, improving forecasting, and ensuring value for money.
- 4.20 Proposed revenue budget virements above £250,000 require Executive approval, and those proposed following Quarter Two monitoring are set out at Appendix 1 for consideration and approval.

Adult Social Care: current forecast budget pressure at year end £1.637m

Adult Social Care	Full Year Budget £m	Full Year Forecast £m	Forecast Over / (Under) spend £m
Revenue Outturn	56.597	58.234	1.637

- 4.21 A budget pressure of £1.637m is currently forecast for the Directorate at year end, the main reasons for this are detailed below:

- *Prevention, Provider & Support Service: £0.232m*

Mainly because of unachieved savings and a shortfall of income in respect of the re-provisioning of Levick Court. Executive on 12th November 2025 approved a report regarding the reprovision of Levick Court. The proposed partnership with the Integrated Care Board (ICB) and Tees Esk and Wear Valleys NHS Trust (TEWV) aims to establish a financially sustainable model through joint commissioning and integrated clinical support. This model also allows for potential revenue generation if demand for health-commissioned beds exceeds the initial allocation of eight. A full financial appraisal and staffing model have been developed to ensure the block contract value will cover operational costs and support delivery of the £311,000 savings target set in 2024/25.

- *Purchasing - Growth: £2.042m*

This pressure has increased from £1.076m in Quarter One. The increase is attributed to demand for high-cost care services, particularly residential care. The forecast includes an estimate of net future growth for the remainder of the financial year, including a provision for additional health income in relation to some of the new care packages, however as the year progresses this may change.

- *Purchasing - Residential: (£0.458m)*

Savings have been achieved through the recovery of overpayments for out of area placements. These overpayments occurred due to delayed notifications from care homes following service users' death. New procedures have been implemented to prevent recurrence.

- *Other Variances across the Directorate: (£0.179m)*

Within the predicted saving of £0.179m there are staffing pressures that amount to £0.312m, mainly within Specialist & Lifelong Services and Access & Safeguarding. However, anticipated staff turnover later in the year has led to a reduced forecast, this is not attributed to a specific service line at present.

- *To address the forecast budget pressures, the Directorate is implementing the following measures:*

Levick Court Reprovision: as outlined above, the partnership with ICB and TEWV is expected to deliver savings and generate additional income.

Agency Staff Review: weekly reviews by the Director of Adult Social Services to ensure agency staff are being replaced with permanent hires where appropriate.

High-Cost Package Scrutiny: care package review, where all packages exceeding £5,000 per week are flagged for discussion at ASC Finance DMT sessions. This aims to reduce expenditure and identify commissioning gaps.

Transition Review: a focused review of transitions to promote closer joint working and prevent the implementation of high-cost packages prior to transfer to adult services.

Vacancy Freeze: a freeze on non-critical vacancies for the remainder of 2025/26 to control staffing costs.

Public Health: forecast break even

Public Health	Full Year Budget £m	Full Year Forecast £m	Forecast Over / (Under) spend £m
Revenue Outturn	0.086	0.086	(0.000)

- 4.22 An underspend of £0.299m is currently forecast on Public Health budgets for 2025/26, however in accordance with the grant conditions this will be transferred to the Public Health reserve at year end resulting in an overall break-even position forecast at year end. The Public Health Reserve totalled £1.686m at 31 March 2025 and plans are in place for this to be utilised on public health activities in accordance with the grant conditions.

Children's Care: current forecast budget pressure at year end £8.004m

Children's Care	Full Year Budget £m	Full Year Forecast £m	Forecast Over / (Under) spend £m
Revenue Outturn	57.700	65.704	8.004

- 4.23 An overall budget pressure of £8.004m is currently forecast for the Directorate at year end. However, with the application of the Children's Services Prevention grant of £2.123m, this is likely to reduce to £5.881m. While the grant income is already included in the Council's overall forecast position, it is currently held within Central Budgets in section 4.31 and shown within Central Budgets forecast figure. In relation to the grant, although the associated costs are currently reflected in the £8.004m, the expenditure is subject to assurance to ensure the expenditure meets the grant conditions. The Finance team is actively working through this assurance process, and once completed, the grant will be allocated to Children's Care. The main reasons for the forecast budget pressure within Children's Care are detailed below:

- ***External Residential placements: £5.663m***
The number of Children Looked After (CLA) in Middlesbrough has remained broadly stable. However, there has been an increase in external residential placements, rising from 77 on 30 June 2025 to 84 by 30 September 2025. Alongside this increase, higher costs are being driven by the complexity of placements needs compared to those budgeted.

It should be noted that a significant proportion (21.3%) of the Council's CLA are placed in residential type settings (107 children out of a total CLA of 502 as at 30 September 2025).

Three projects have been launched to reduce the CLA numbers and residential placements. While the Reunification Project has shown positive impact, the Modernising Fostering and Edge of Care initiative have yet to deliver reductions.

This budget is likely to be volatile throughout the financial year due to a number of highly complex placements currently in place, which are greater in number than in previous years.

As part of the financial recovery plan, Children's Care is reviewing the use of vacant internal beds, including changes to the statement of purpose for internal residential homes to improve occupancy. The service also aims to maximise use of block bed contracts (6-bed and 12-bed units) by identifying external placements suitable for transfer and securing referrals for the new provision.

Under the Fostering Project, Children's Care are identifying young people who could realistically move from residential to foster care, along with projected timelines. However, progress is constrained by foster carer availability. Although recruitment is ongoing, it currently only offsets those leaving the profession, resulting in no net increase.

£0.200m of mitigation has been proposed by the Service as part of its recovery plans and these will be included in future forecasts if assured. A full review of placement planning across all related services is being undertaken along with placement plans for the next couple of years for existing young people in order to feed into the Council's MTFP for 2026/27 onwards. This includes the Fostering project and internal residential occupancy with a revised statement of purpose.

- *Fostering, Adoption and other internal placements: (£0.122m)*
Services within the Directorate are experiencing significant financial pressures due to costs associated with transport, emergency placements for looked-after young people, and support for those on the edge of care.

The Internal Fostering service currently has higher numbers of placements than originally budgeted, which would normally result in increased expenditure. However, because the planned expansion of Internal Fostering capacity has not been achieved due to recruitment challenges, the service is forecasting an underspend against its budget. This underspend is helping to offset financial pressures in other areas. The increased internal fostering numbers have not yet had a significant forecast impact on reducing demand for external residential placements.

- *Assessment & Safeguarding: £1.864m*
Assessment and Safeguarding have experienced a significant increase in the financial pressure, rising from £1.023m to £1.864m. This increase is largely due to the service's growing reliance on agency staff, which are more expensive than permanent employees. Staffing demand has increased across the Directorate, with agency workers brought in to cover sickness and maternity leave, as well as roles beyond the budgeted establishment. As a result, the service is currently operating above its approved staffing structure.

A review is underway to assess all agency positions and determine long-term staffing requirements for Medium-Term Financial Planning (MTFP). This review is also linked to current unachievable savings, which were partly based in assumptions around reduced staffing levels. Additionally, a small portion of the financial pressure relates to Section 17 spending.

- **Other Variances across the Directorate: £0.599m**

Across the remainder of the Children's Care directorate there are further financial pressures of £0.599m. This includes a £0.240m forecast pressure in Children Looked After and Children with Disabilities Services, driven by staffing pressures, particularly the use of agency staff, and emergency placements. Other services are forecasting a £0.515m pressure due to increased reliance on agency resource workers partially offset by vacancies across resource teams and projected savings within the Prevention service. Management is forecasting a saving of (£0.156m), due to vacancies in senior roles and business support service posts which partly offsets the pressures.

- *To address the forecast budget pressure, the Directorate is implementing the following measures:*

Identification of expenditure to potentially be funded by Flexible Use of Capital Receipts (FuoCR) within Assessments and MACH services for improvements and Ofsted readiness.

Residential Placements: All children who are cared for in external homes are being reviewed via the out of area panel chaired by the Director of Children's Services with the aim to assess quality, consider alternative step-down plans and other options for children and young people.

Maximise internal residential placements, including a review of the statement of purpose to improve occupancy.

Ensure the block bed contracts of which we have two (6-bed unit and 12-bed unit) are fully utilised.

Recruitment & Retention Strategy: Children's Care are in the final stages of appointing a recruitment lead who will lead in the recruitment and retention strategy.

In addition, the service will implement tighter controls in agency staff usage.

High-Cost Package Scrutiny: Placements exceeding £7,000 per week will require additional approval by the Director of Children's Care or the Director of Children's Services. This aims to reduce expenditure and identify commissioning gaps.

Education & Partnerships: current forecast budget pressure at year end £0.469m

Education & Partnerships	Full Year Budget £m	Full Year Forecast £m	Forecast Over / (Under) spend £m
Revenue Outturn	6.798	7.267	0.469

- 4.24 The forecast budget pressure of £0.469m within Education and Partnerships is due to the Integrated Transport Service, which provides home-to-school transport for children and transport for vulnerable adults.

- *Integrated Transport Unit: forecast budget pressure £0.469m*

The pressure is primarily due to unachievable savings of £0.345m. Whilst preparing the Financial Recovery Plan the service reviewed each of the savings and believe they remain achievable within a more realistic timeframe, therefore whilst their Financial Recovery Plan may not necessarily achieve the required savings to ensure a balanced position by the end of the year, they are confident that the savings can still be delivered in the following year. In the meantime, the service is exploring alternative savings options and conducting a full review of all transport routes and operational efficiencies aligned with the school academic year from September 2025.

Regeneration: current forecast budget pressure at year end £0.225m

Regeneration	Full Year Budget £m	Full Year Forecast £m	Forecast Over / (Under) spend £m
Revenue Outturn	3.176	3.401	0.225

4.25 An overall forecast budget pressure of £0.225m is currently forecast for the Directorate at year end, the main reasons for this are detailed below

- ***Strategic Commercial Properties £0.405m***

£0.411m Boho Buildings - Currently only 20% of the buildings are occupied, resulting in lost rent and increased building related costs to the Council. A sector expert in managed accommodation has now been appointed and as from December 2025 will be actively seeking tenancies.

£0.099m Centre Square 1 and 2 - The major tenant at Centre Square 1 has renewed its lease agreement and reduce the space occupied, therefore increasing the cost to the Council due to the vacated space. The Council is actively seeking alternative tenancies for the remaining space.

£0.312m below budgeted income at Cleveland Centre and Captain Cook Square shopping centres.

The above pressures are partially alleviated by the Investment Property Contingency budget being fully utilised.

- ***Other Variances across the Directorate including Unachieved Savings: (£0.180m)***

The savings of £0.300m relating to homelessness will now not be achieved. Whilst actions are being undertaken which will address costs, the nature of the budgets which sit within other directorates and the increase in homeless cases will only result in cost reduction as opposed to budget savings. It is proposed that this saving is permanently replaced by a reduction in unrequired supplies and services budgets across Regeneration.

There will be an underachievement of a saving relating to the Captain Cook Museum of £0.075m due the service only receiving half of the £0.150m of sponsorship and donations income that were previously assumed. The unachieved element of the savings will be permanently covered by general savings across the Cultural Services.

4.26 There are other variances across the Directorate below £0.250m which reduce the total forecast budget pressure across the Regeneration Directorate to £0.255m.

Environment & Communities: current forecast budget pressure at year end £0.922m

Environment & Communities	Full Year Budget £m	Full Year Forecast £m	Forecast Over / (Under) spend £m
Revenue Outturn	21.972	22.894	0.922

4.27 There has been a significant improvement in the forecast budget pressure which was reported to be £1.898m at Quarter One and is now currently forecast at £0.922m for the Directorate at year end, the main reasons for this are detailed below:

- Bereavement Services £0.369m***

Bereavement Services have improved their forecast position by reducing the budget pressure by £0.094m. The remaining forecast budget pressure of £0.369m is primarily due to a reduction in the number of cremations, resulting in an anticipated income shortfall of £0.256m. Additionally, expenditure is expected to exceed budget by £0.113m, mainly due to the replacement of the digital display and music system. However, the facility remains in a financially stable position and is able to cover its running costs. The anticipated income levels have been impacted by competition from neighbouring facilities. Ongoing reviews of operations and processes are beginning to have a positive effect, and part of the cost pressure has been mitigated through the capitalisation of some of the digital display equipment and PlotBox, a new booking system.
- Catering Service £0.206m***

The financial pressure is due to rising food costs combined with school meal prices that have not been increased to reflect the cost of delivering the catering service. This position is influenced by the Executive's decision to not increase the price of school meals in order to support families. A decision is required as to whether to increase prices to cover costs or identify alternative mitigation.
- Fleet Services £0.495m***

Fleet Services currently forecasting a budget pressure of £0.495m, an improvement from the previous forecast of £0.600m. Financial pressures persist due to difficulties in recruiting and retaining mechanical fitters, as well as the rising vehicle parts costs. A review of the service recommended a hybrid vehicle replacement strategy, combining direct capital purchase with leasing. For leased vehicles, repair and maintenance costs would be included, which is expected to reduce future costs. Decisions to lease or purchase will be made on a case by case basis, supported by financial analysis to ensure value for money.
- Management Review Savings £0.374m***

Increased service demands, growth and a health and safety issue has meant that the Director of Environment and Community Services has had to delay his staffing restructure. This is expected to result in a pressure of £0.374m. The original review will need to be re-configured to align with the updated service needs and is expected to complete in 2026/27.

- ***Other Variances across the Directorate: (£0.148m)***

Additional Capital Grant has been received following a Government Spending review, this has allowed the service to review and capitalise some of the works that have been completed or that are due to take place that were previously funded from the revenue budget. In addition, due to delays in recruitment particularly within Area Care temporary in year savings have been realised, all which have supported with the reduction of the forecast budget pressure.

- ***To address the forecast budget pressures, the Directorate is implementing the following measures:***

The Directorate is implementing a range of measures, within Environment Services, recruitment is limited to essential posts only, Public Protection is considering delaying recruitment to a small number of vacant positions to help manage in-year pressures and across all services, expenditure is monitored and assessed to ensure it is essential.

In Catering, the Service is reviewing the impact of increasing school meal prices, with a separate paper to be prepared outlining the rationale for a price increase and presenting various pricing models

Legal & Governance: current forecast underspend at year end (£0.252m)

Legal & Governance	Full Year Budget £m	Full Year Forecast £m	Forecast Over / (Under) spend £m
Revenue Outturn	12.079	11.827	(0.252)

4.28 An overall underspend of (£0.252m) is currently forecast for the Directorate at year end, the main reasons for this are detailed below:

- ***ICT Service: (£0.297m)***

There are a number of posts that had been kept vacant until the new Head of Service commenced her role, resulting in (£0.323m) of forecast salary savings in 2025/26.

- ***Customer Centre / Mail and Print: £0.081m***

Mail & Print costs are currently 22% higher than the previous year, and if this trend continues, the forecast financial pressure could increase to £0.109m without further action. To mitigate this, several cost-saving measures have already been implemented. Staff have been advised to use the economy mail option, saving 4.5p per letter with a potential reduction in costs of £0.020m. Residents and Business Services, the largest user of Mail and Print, is working closely with the team to identify further reductions. Additionally, the print contract is being transferred to a new supplier, and the mail contract has been extended for one year with the discount on economy post as mentioned above.

- Although Legal & Governance are forecasting an overall underspend of £0.252m, a Financial Recovery Plan has been submitted in response to areas facing ongoing pressure, particularly where demand is expected to continue into the next financial year.

Finance: current forecast underspend at year end (£0.738m)

Finance	Full Year Budget £m	Full Year Forecast £m	Forecast Over / (Under) spend £m
Revenue Outturn	4.374	3.636	(0.738)

4.29 An overall underspend of (£0.738m) is currently forecast for the Directorate at year end – the main reasons for this are detailed below:

- (£0.490m) within *Financial Planning & Business Partnering* mainly due to MTFP growth provided at 2025/26 budget setting not forecast to be fully utilised in 2025/26 as the associated staff review has not yet been implemented.
- £0.119m within *Corporate Finance* mainly due to pressures on bank charges and costs of cash collection.
- (£0.171m) within *Pensions Governance and Investments* due to staff savings on vacant posts.
- (£0.308m) within *Resident & Business Support (excluding Housing Benefits Subsidy)* due to staff savings, higher than anticipated income, and changes in bad debt provision requirement.
- £0.166m in relation to Resident & Business Support Housing Benefit Subsidy. The forecast has been updated following the submission of the Mid-Term Subsidy claim.
- (£0.054m) within *Strategic Commissioning & Procurement* mainly due to staff savings from vacant posts and staff working reduced hours to those budgeted.
- Although Finance is forecasting an overall underspend of £0.738m, a Financial Recovery Plan has been submitted in response to areas facing ongoing pressure, particularly where demand is expected to continue into the next financial year.

Chief Executive: forecast break even

Chief Executive	Full Year Budget £m	Full Year Forecast £m	Forecast Over / (Under) spend £m
Revenue Outturn	0.259	0.259	0.000

4.30 The Chief Executive budget is made up of the Chief Executive's salary budget, plus a small budget for supplies and services, and at this stage, it is forecast that this budget will be spent in full, with no variance to budget expected.

Central Budgets: current forecast underspend at year end (£2.454m)

Central Budgets	Full Year Budget £m	Full Year Forecast £m	Forecast Over / (Under) spend £m
Revenue Outturn	(19.737)	(22.191)	(2.454)

4.31 The main issues comprising the latest forecast position for Central budgets are detailed below, however it should be noted that due to the nature of the budgets contained in this area, including Central Contingency budgets, the position on Central budgets is volatile, and it is to be expected that the forecast position on these budgets will change between accounting reporting periods.

- (£1.000m) on *Capital Financing* due to a combination of Exceptional Financial Support (EFS) financed by borrowing now not being required and slippage within the capital programme, resulting in lower revenue costs of financing capital expenditure.
- (£0.465m) on *Centrally Held Grants* due to final confirmation of the Extended Producer Responsibility (EPR) Grant funding which was higher than anticipated at the time of budget setting.
- £0.244m savings target due to the *Senior Management Review* will now not be achieved in 2025/26.
- (£0.730m) savings on the *Change Fund*, the planned contribution to top up the Change Fund Reserve in 2025/26 is no longer deemed a requirement due to the current use of FUoCR to fund Transformation & Redundancy costs.
- (£2.123m) A centrally held Government Grant, the Children's Services Prevention Grant, as referenced in section 4.23, is currently contributing to the underspend within Central Budgets. Although the grant is included in the Council's overall forecast position, it is temporarily held centrally pending completion of an assurance process. The Finance team is actively working through this process to confirm the associated expenditure. Once assurance is complete, the grant will be allocated to Children's Care, thereby reducing their forecast budget pressure from £8.004m to £5.881m.
- £1.704m due to *Cross Cutting Savings* which are now not expected to be achieved due to the following:
 - £0.700m relating to Contractual Spend Review, which has now been identified as a double count of a 2024/25 saving.
 - £1.004m of savings relating to Business Rates and Council Tax, which whilst savings have been made as intended these are recognised in the Collection Fund rather than the General Fund. Due to the prescribed mechanisms for operating the Collection Fund, the savings in the Collection Fund do not impact the General Fund position until the next year and therefore these cannot be included within the revenue outturn for 2025/26 (see paragraph 4.57 for details)

- The ongoing effect of the above unachieved savings is being considered within the MTFP for future years, as noted in the separate report to this Executive.

Contingency Budget and Change Fund

4.32 Table 3 summarises the 2025/26 budgets and commitments against the central Corporate Contingency budget and Change Fund Reserve which are controlled under the delegated powers of the S151 Officer.

Table 3 – Summary of 2025/26 budget and commitments - Corporate Contingency Budget and Change Fund Reserve

	Corporate Contingency £m	Change Fund Reserve £m
Starting Budget 2025/26	1.327	2.766
Contributions 2025/26 (<i>Planned contribution of £0.730m in 2025/26 no longer required due to use of Flexible Capital Receipts Funding for transformational expenditure</i>)	-	-
Temporary budget virement to ECS to cover unachieved Residents Parking Permit charges saving	(0.250)	-
Available for use	1.077	2.766
<u>Approved use to date</u>		
Middlesbrough Independent Improvement Advisory Board costs 2024/25 - residual costs falling into	(0.009)	
Employers Pension Contribution Rate Review costs	(0.003)	
Interim Finance consultant - Infrastructure, assets and leasing	(0.002)	
Financial improvement - Interim finance lead - accounts closure and audit, financial reporting, systems, and	(0.007)	
Armed Forces Day Council contribution	(0.001)	
Turner Prize contribution	(0.300)	
LGS Staff Review costs	(0.236)	
<i>Earmarked for potential use from Contingency Budget - if other budgets not available within Directorates</i>		
Education - Literacy work & events	(0.010)	
Finance - Community Grants - VE Day Celebrations	(0.027)	
General contingency for remainder of year	-	
Approved use to date	(0.595)	-
BALANCE REMAINING CURRENTLY UNCOMMITTED ON CORPORATE CONTINGENCY - AVAILABLE TO MITIGATE FORECAST OVERSPEND	0.482	
FORECAST CLOSING BALANCE ON CHANGE FUND RESERVE AT 31/03/26		2.766

Council Reserves and Provisions

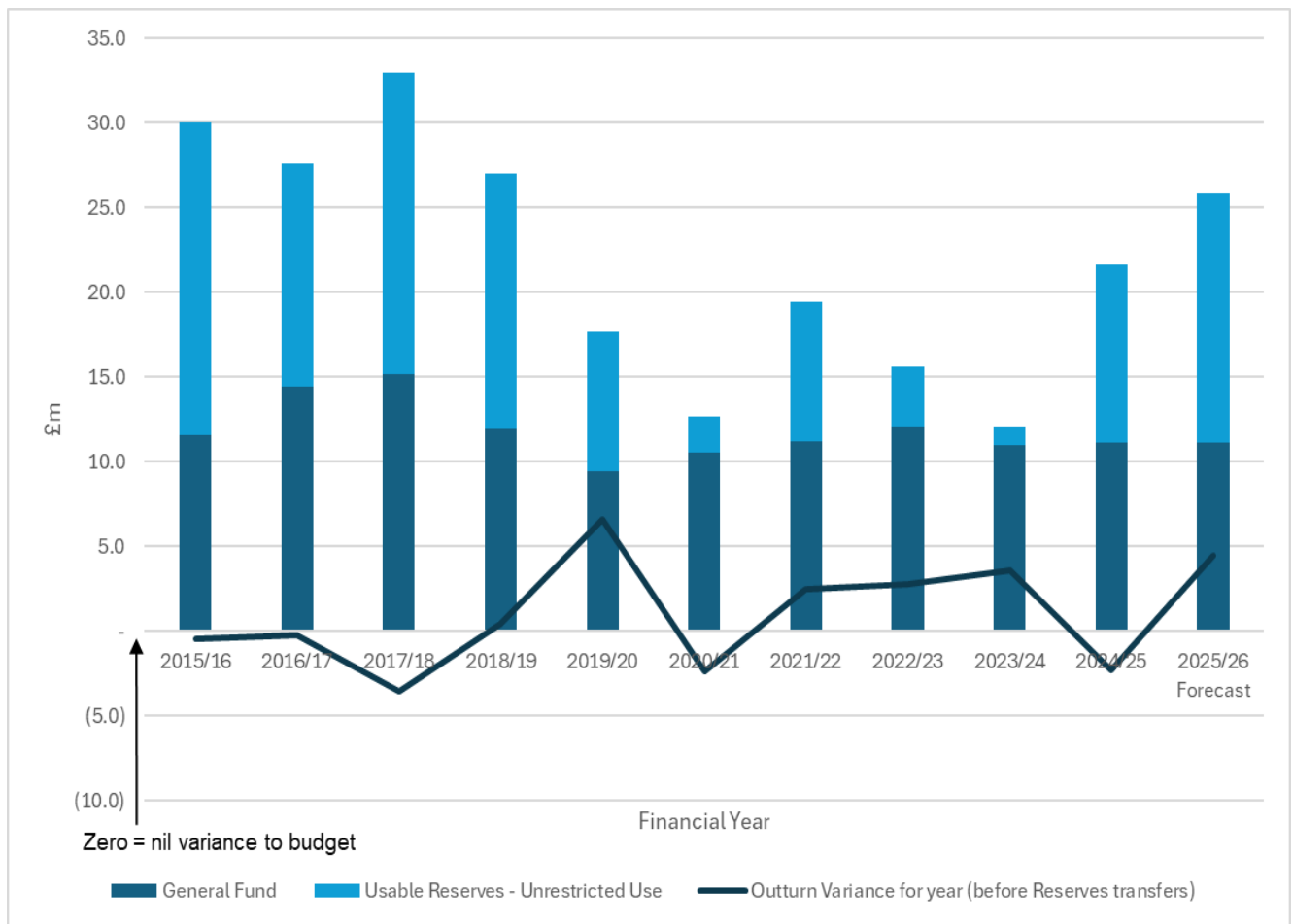
4.33 Table 4 summarises the Council's General Fund reserves and provisions showing the movement between 31 March 2025 and that currently forecast at 31 March 2026, with full details included in Appendix 3. It shows that the Council has forecast usable unrestricted revenue reserves on 31 March 2026 of £25.808m (highlighted yellow).

Table 4 – Summary of General Fund Balance, Reserves, and Provisions

	<u>Opening Balance 01/4/25</u>	<u>Forecast Use in Year</u>	<u>Projected Additional Contributions</u>	<u>Projected Transfers from / (to) General Fund</u>	<u>Projected Transfers between Reserves</u>	<u>Forecast 2025/26 year end overspend</u>	<u>Forecast Balance at 31/3/26</u>
	<u>£m</u>	<u>£m</u>	<u>£m</u>	<u>£m</u>	<u>£m</u>	<u>£m</u>	<u>£m</u>
GENERAL FUND RESERVE	11.100	-	-	-	-	-	11.100
USABLE EARMARKED RESERVES							
Restricted Use	2.689	-	0.500	-	-	-	3.189
Unrestricted Use	10.554	-	5.958	-	-	(1.804)	14.708
	13.244	-	6.458	-	-	(1.804)	17.898
UNUSABLE EARMARKED RESERVES	(16.813)	-	-	(9.000)	-	-	(25.813)
SCHOOL BALANCES	3.050	-	-	-	-	-	3.050
PROVISIONS	3.814	-	-	-	-	-	3.814
	14.395	-	6.458	(9.000)	-	(1.804)	10.049

4.34 Figure 1 below shows the trajectory of Middlesbrough's unrestricted usable reserves from 2015/16 through to 2025/26 year-end forecast closing balance against both the recommended minimum reserves level and the reported outturn position per year.

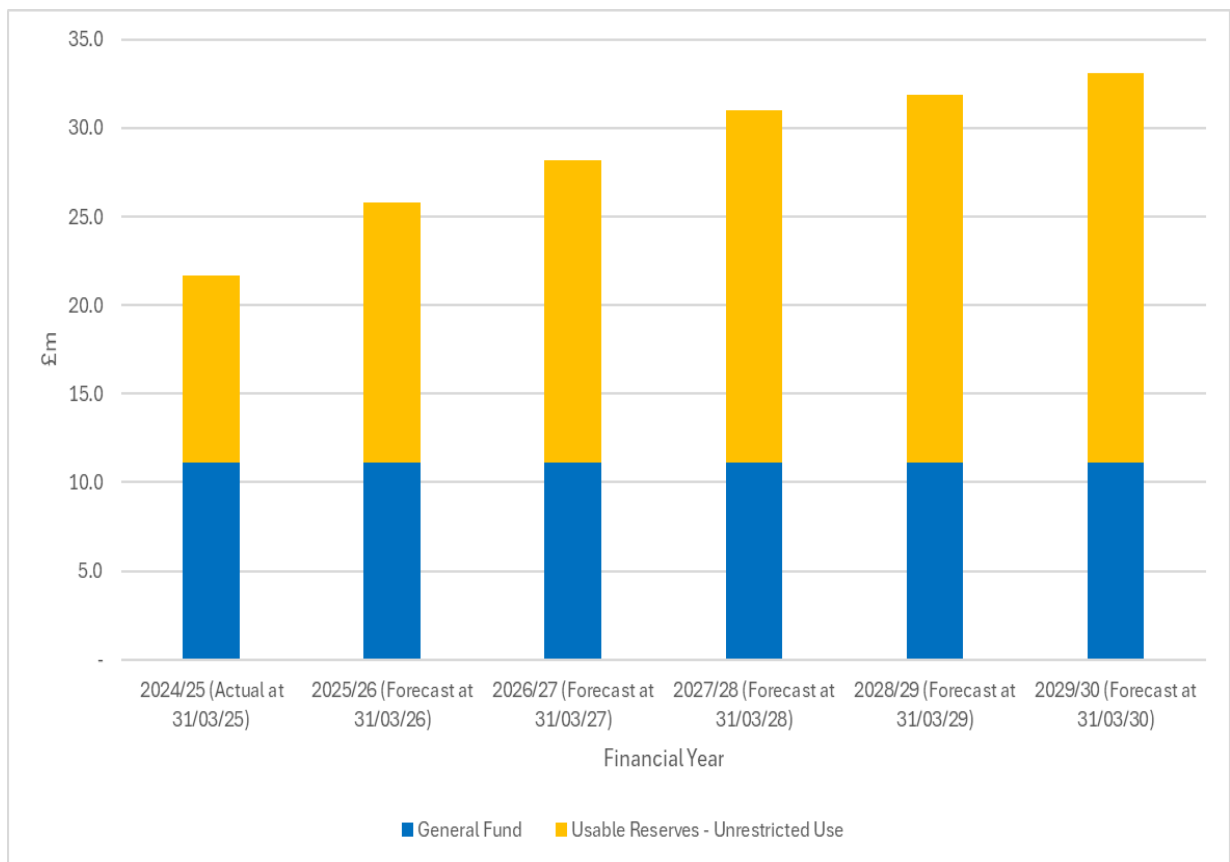
Figure 1 - Middlesbrough Council - Unrestricted Reserves Balances from closing balance 2015/16 through to year-end forecast closing balance 2025/26 and reported outturn variance per year



4.35 The Council must continue to rebuild its unrestricted revenue reserves over the period of the MTFP in order to strengthen the Council's financial resilience and to provide sufficient resilience to support the management of risks in the delivery of the revenue budget over the current MTFP period. Reserves will increase in future years due to planned contributions to reserves as set out in the Reserves Policy in the 2025/26 Revenue Budget, Medium Term Financial 2025/26 to 2028/29, and Council Tax report to Council on 19 February 2025.

4.36 Figure 2 below shows the projected unrestricted usable reserves through to the end of 2029/30 after planned contributions; however this will depend on any unplanned drawdowns of reserves.

Figure 2 - Forecast Unrestricted Usable Reserves from closing balance 2024/25 through to closing balance 2029/30 (following planned contributions and drawdowns)



Dedicated Schools Grant (DSG)

4.37 Local authorities receive a ring-fenced grant from central government each year, which can only be used to fund education – Dedicated Schools Grant (DSG). The DSG budget is accounted for separately to the main Revenue Budget. The funding comprises of a number of blocks:

- Schools Block
- Central School Services Block
- High Needs Block
- Early Years Block

4.38 Table 5 below summarises the latest position on the DSG budget and shows that there is a forecast budget pressure at year-end of £9.000m on DSG within 2025/26 and this when added to the cumulative deficit at the end of 2024/25 means that there is currently forecast a total cumulative deficit of £31.213m on 31 March 2026.

Table 5 - Dedicated Schools Grant (DSG) after recoupment and deductions

	2025/26 Income	2025/26 Expenditure	2025/26 Year-end Overspend	Balance as at 31/03/2025	Cumulative DSG Deficit as at 31/03/2026
	£m	£m	£m	£m	£m
Early years Block	22.674	22.674	0.000	(0.749)	(0.749)
Schools Block	12.526	12.526	0.000	(0.490)	(0.490)
High Needs Block	33.910	42.910	9.000	23.515	32.515
Central school services Block	1.136	1.136	0.000	(0.063)	(0.063)
TOTAL	70.246	79.246	9.000	22.213	31.213

- 4.39 The DSG is subject to a statutory override by central Government which instructs Councils to account for the DSG deficits and resulting negative balance in a separate reserve and not to fund it by using its General Fund resources. This was planned to end on 31 March 2026, however in the Government's Fair Funding review consultation published on 20 June 2025 it was announced that this would be extended by a further two years to 31 March 2028 to tie in with the transition to a reformed Special Education Needs and Disabilities (SEND) system, details of which will be set out in a White Paper in the autumn.
- 4.40 The limited impact of measures taken to date and if the statutory override is removed without a government led solution in 2028, this presents a significant risk to the Council's financial position as the forecast DSG deficit at 31 March 2026 of £31.213m is greater than all of the Council's forecast usable revenue reserves of £25.808m at 31 March 2026, and the DSG deficit is currently forecast to increase in future years of the MTFP by more than the forecast increase in reserves. Like many local authorities, this could result in the Council being subject to a s114 Notice in the future without a solution by the Government.
- 4.41 The Delivering Better Value (DBV) programme ended Summer 2025 and the results of this will be analysed and further work undertaken by the Education Service and Finance to look at options to improve the deficit figures during future years. However, there is a likelihood of significant deficits continuing to arise in future years and this will therefore remain a significant risk in the future even if the Government resolves the deficits accumulated from previous years.
- 4.42 Further details of the DSG budget and the management actions being taken alongside the DBV programme are provided in Appendix 4.
- 4.43 The DSG risk is included in the Council's Strategic Risk Register and was reflected in the Annual Governance Statement for 2024/25.

Medium Term Financial Plan issues

4.44 Quarter Two budget monitoring has identified several issues for consideration along with other strategic longer-term issues within the next update of the Council's Medium Term Financial Plan (MTFP) for which a separate 2026/27 Draft Budget and Medium Term Financial Plan 2026/27 to 2029/20 is included in the agenda for this Executive. These mainly relate to increased demand for Children's and Adults Social Care, Integrated Transport Unit (home to school and vulnerable adults transport), Bereavement, Catering and Fleet Services, Strategic Commercial Property income, and unachieved savings.

2025/26 Capital Programme Forecast Outturn as at Quarter Two

4.45 On 19 February 2025 Council approved a Capital Programme for 2025/26 of £74.798m (the original 2025/26 capital budget). This was revised to £82.571m as approved by Executive within the 2024/25 Revenue and Capital Outturn report of 11 June 2025 to take account of 2024/25 programme slippage and some new externally funded schemes. At Quarter One the budget was revised to £87.575m to account for additional programme slippage and new externally funded schemes.

4.46 The budget has been revised at Quarter Two by the addition of a total of £0.454m of new externally funded schemes / additional external funding to existing schemes. Also, additional £0.065m of Council funding in 2025/26 has been added to fund new and existing schemes. The total additional funding of £0.519m has increased the capital programme for 2025/26 to £ 88.094m as at Quarter Two. Details of all of the additional funding and the schemes to which it is attributed to are provided at Appendix 5.

4.47 There are two virements requested for approval by Executive between schemes in the Capital Programme approved by Council on 19 February 2025 which are funded from within existing Council resources over £0.250m. There is one additional virement that is under £0.250m, for information, all virements between schemes are provided at Appendix 5.

- £0.871m virement from De-Risking Sites to Site Assembly at Middlehaven in respect of a longstanding legal dispute.
- £0.500m virement from the Transformation Contingency to fund newly approved and existing transformational initiatives.

4.48 The 2025/26 projected outturn on capital expenditure at Quarter Two is £67.144m, the revised projection includes new and additions to existing schemes, reductions in existing schemes and programme slippage.

4.49 The £67.144m of planned expenditure is expected to be funded by:

- £36.277m (54%) grants and external funding / contributions
- £12.132m (18%) capital receipts
- £18.735m (28%) borrowing

Table 6 – summary of capital programme approved budget, revised budget, forecast year end outturn and variance for 2025/26

Directorate	2025/26 Capital Programme Budget (as approved by Council 19/2/25)	2025/26 Revised Capital Programme Budget (as at Quarter 1)	2025/26 Revised Capital Programme Budget (as at Quarter Two)	2025/26 Year-end Forecast Outturn	2025/26 Year-end Forecast Outturn Variance	2025/26 Year-end Forecast Outturn Variance against Revised Budget at Quarter Two	MEMO Explanation of Year-End Forecast Outturn Variance	
	£m	£m	£m	£m	£m	%	Slippage £m	Underspend £m
Regeneration	32.716	34.145	34.170	26.090	(8.080)	(23.65)	(8.080)	-
Environment and Community	20.198	26.538	26.628	22.169	(4.459)	(16.75)	(3.836)	(0.623)
Public Health	0.779	1.042	1.042	0.942	(0.100)	9.60	-	(0.100)
Education and Partnerships	7.553	11.772	12.176	4.913	(7.263)	(59.65)	(7.151)	(0.112)
Children's Care	0.550	0.821	0.821	0.821	-	0.00	-	-
Adult Social Care	3.701	3.925	3.925	3.905	(0.020)	0.51	-	(0.020)
Legal and Governance Services	1.610	1.629	1.629	1.978	0.349	21.42	0.349	-
Finance	0.191	0.203	0.203	0.194	(0.009)	4.43	(0.009)	-
Transformation Programme	7.500	7.500	7.500	6.132	(1.368)	18.24	(1.368)	-
Total	74.798	87.575	88.094	67.144	(20.950)	(23.78)	(20.095)	(0.855)

4.50 Capital slippage results from a delay in delivery of projects compared to the planned delivery. Whilst expenditure remains within the approved project budget, this results in an in-year underspend which is required to be carried forward to future financial years. This is called slippage. The amount of slippage (currently forecast at £20.095m) is reprofiled and carried forward to 2026/27 to 2028/29 to reflect revisions to the expected delivery and expenditure timescale. £11.867m of the stated £20.095m slippage has been identified following reviews of the status of projects within the capital programme during Quarter Two. Additionally, expenditure assumptions relating to future years has also been reviewed. Details of all slippage / reprofiling of spending assumptions throughout the capital programme as at Quarter Two are shown in Appendix 6

4.51 As at Quarter Two a total of £0.855m of underspend within schemes has been removed from the 2025/26 capital programme, £0.755m has been previously reported in the Quarter Two report and an additional £0.127m has been identified during the Quarter Two review.

Transformation

4.52 The Capital Programme 2025/26 to 2028/29 and Capital Strategy 2025/26 (Appendix 6) of the 2025/26 Revenue Budget, Medium Term Financial Plan and Council Tax setting report approved by Council on 19 February 2025 noted the inclusion of transformation and redundancy expenditure totalling £7.500m which can be capitalised under the Flexible Use of Capital Receipts Strategy (FUoCR) in 2025/26 (as part of the planned £26.700m Transformation Programme from 2024/25 to 2028/29), and the annual Flexible Use of Capital Receipts (FUoCR) Strategy for 2025/26 approved by Council on 26 March 2025 confirmed this and provided further details.

4.53 This section provides an update on the FUoCR with £6.132m anticipated to be spent within 2025/26, however there has been a change in how it will be spent as shown in Appendix 7. Appendix 7 also shows that the total remaining allocation of £16.121m for 2026/27 onwards has also been reviewed at Quarter Two. The following changes to assumptions regarding FUoCR have therefore been made:

- The total projected expenditure during 2025/26 has reduced to £6.132m, this is primarily due to changes in assumed start dates for the physical works at the Neighbourhood hubs additionally, new ICT solutions are being assessed, it is not envisaged that there will be significant expenditure within 2025/26, consequently £1.305m of anticipated expenditure has been re-profiled into 2026/27 and £0.630m into 2027/28.
- The total allocation for Transformation / Subject Matter Expertise over the MTFP period has increased from £6.802m to £7.664m to fund newly approved initiatives. The increase of £0.862m has been funded through a reduction in the contingency budget.

4.54 Table 7 summarises, and Appendix 7 details updated forecast year-end outturn expenditure for 2025/26 and forecast expenditure for the period 2026/27 to 2028/29 split over the various schemes and the proposed funding.

Table 7 – Summary of Capital Programme 2025/26 to 2028/29

Directorate	2025/26 Forecast £m	2026/27 Forecast £m	2027/28 Forecast £m	2028/29 Forecast £m	TOTAL £m
Regeneration	26.090	41.872	10.403	7.783	86.148
Environment and Community Services	22.169	13.984	6.108	7.256	49.517
Public Health	0.942	-	-	-	0.942
Education and Partnerships	4.913	8.262	-	-	13.175
Children's Care	0.821	-	-	-	0.821
Adult Social Care	3.905	1.669	1.050	1.120	7.744
Legal and Governance Services	1.978	1.873	2.185	2.185	8.221
Finance	0.194	0.398	-	-	0.592
Transformation Programme	6.132	10.827	5.294	-	22.253
Total EXPENDITURE	67.144	78.885	25.040	18.344	189.413
Funded by					
Borrowing	18.735	21.687	3.074	-	43.496
Capital Receipts	6.000	6.000	12.560	14.231	38.791
Flexible Use of Capital Receipts	6.132	10.827	5.294	-	22.253
Grants	35.339	33.059	-	-	68.398
Contributions	0.938	7.312	4.112	4.113	16.475
Total FUNDING	67.144	78.885	25.040	18.344	189.413

Treasury Management - Borrowing & Prudential Indicators

- 4.55 The Council's investment and borrowing activity is managed in accordance with the Treasury Management Strategy (TMS) which is a key element of the MTFP alongside the annual revenue budget and capital programme which are approved by Council annually before the start of the financial year, with the TMS for 2025/26 approved by Council on 19 February 2025.
- 4.56 Treasury Management activity is governed by the Prudential Indicators which are set within the TMS. The Council uses external expert treasury advisors (Arlingclose) to inform the development of its strategy and operational in year decisions. A half yearly review of the Council's TMS and prudential indicators has taken place at Quarter Two and a specific report is submitted to Executive elsewhere on this agenda.

Collection Fund - Council Tax and Business Rates income

- 4.57 Income received from Council Tax and Business Rates (NNDR) is a major source of revenue income for the Council and funds around 62% of its annual expenditure in delivering all Council services. It is accounted for within the Collection Fund and operates under the Government regulations. Due to the prescribed mechanisms for operating the Collection Fund, the financial impact of any 2025/26 income collection variances from the budgeted amount used in setting the Council Tax for 2025/26 do not immediately affect the General Fund position. By illustration, the impact of any estimated surplus or deficit variance on the Collection Fund for 2025/26 is fed into the development of the 2026/27 budget and MTFP and any cost/ benefit does not impact the 2025/26 financial year.
- 4.58 An update on the Collection Fund position will be provided in the Quarter Three budget monitoring report. Indications suggest that there is currently an estimated forecast surplus on the Collection fund for 2025/26. This will be subject to further assurance work before the figure is confirmed and this will be reported as part of the Budget report in February 2026. The estimated surplus is unavailable in 2025/26 but becomes available to support the development of the 2026/27 budget.

Debt Recovery Performance

- 4.59 A key workstream within the plans to recover the Council's financial position is the renewed focus upon recovering monies owed to the Council from the following sources
- Council Tax
 - Business Rates
 - Sundry (general) debt
 - Housing Benefit Overpayments
- 4.60 The Council's approach to improving debt recovery performance whilst maintaining appropriate support to residents and businesses who are entitled to available help, advice and support, was detailed in Appendix 11 of the Quarter Three 2024/25 report. The position at Quarter Two 2025/26 (30 September 2025) is shown in Table 8 below

Table 8 – Debt Collection Performance Quarter Two 2025/26 (as of 30 September 2025)

Category of Collectable Debt	Balance at 1/4/25 (£m)	Movement in-year (£m)	Balance at 30/9/25 (£m)
Council Tax	40.683	(5.253)	35.430
Business Rates	8.508	(1.606)	6.902
Sundry Debt	8.905	(0.423)	8.482
Housing Benefits Overpayments	5.358	(0.291)	5.067
Total	63.454	(7.573)	55.881

Note that the figures for Council Tax and Business Rates are Middlesbrough's share of the Collection Fund debt (Council Tax 83% and Business Rates 49%).

- 4.61 The financial procedure rules (Financial Procedure Rule 18.80.2 and Financial Limits Annex) for the Council set out the thresholds for debt write offs between the S151 Officer (and nominated deputies) and the Executive. These are set out in Table 9 below for information:

Table 9 – Debt write of levels as per the Constiution

Category of Collectable Debt	S151 Officer (Amount per debtor)	Executive (Amount per debtor)
Council Tax	£0 - £10,000	Above £10,000
Business Rates	£0 - £100,000	Above £100,000
Sundry Debt (single debts)	£0 - £10,000	Above £10,000
Sundry Debt (subscription debts)	£0 - £50,000	Above £50,000
Housing Benefits Overpayments	£0 - £10,000	Above £10,000

- 4.62 All debts raised by the Council require an element of recovery to receive the cash amounts from the appropriate third parties. Due to the wide range of income streams and the volumes of debts raised, there are times where amounts cannot always be recovered, for example council tax debts due to lack of household income, business rates due to companies being wound up, sundry debts due to changing circumstances etc.
- 4.63 Where all avenues for collection of the debt have been exhausted and these can be significant and take several financial years, there is no choice but to write these debts off, generally against the revenue budget which received the benefit of the income previously.
- 4.64 It is recommended accounting practice to assess the level of debts and their recoverability at the end of each financial year, both at directorate level or corporately. Where there is the possibility of non-recovery, an assesment of the likelihood of this happening against the financial value should be calculated for each debt, and the

appropriate amount placed in a bad debt provision. This will then act as a buffer against any amounts that subsequently need to be written off.

- 4.65 Most of these debts that do need to be written off are relatively low in value and can be considered and approved by the Director of Finance and Transformation (s151 Officer). However, there has only been partial delegation of debt write offs to the s151 Officer under the Constitution (financial procedure rules). The amounts delegated (set at the 2023 review and under guidance from CIPFA and in comparison with other councils of a similar size and as shown in Table 9) are nil for the purposes of the Quarter Two report.
- 4.66 In exceptional circumstances following appropriate due diligence being applied over all aspects of the collection process and with no prospect of recovery for the reasons given, debt amounts that cannot be recovered and need to be written off, do exceed these levels and these will be required to be submitted to Executive for approval.
- 4.67 A separate report will be presented to Executive later in the year for approval of the write off a number of such debts, detailing the debtor involved, date raised, amount involved, recovery action taken to date, and the reason why this debt cannot be collected.

5. Ward Member Engagement if relevant and appropriate

- 5.1 Not applicable

6. Other potential alternative(s) and why these have not been recommended

- 6.1 The alternative would be to not approve the revenue budget virements over £250,000 and the changes to the Council's capital programme, and to not report on the Council's forecast year-end financial outturn for the financial year 2025/26. This would not enable the Executive to discharge their responsibilities to manage and control the revenue budget, capital programme and overall balance sheet position of the Council.

7. Impact(s) of the recommended decision(s)

Topic	Impact
Financial (including procurement and Social Value)	This report sets out the implications associated with the financial performance of the Council in managing its revenue, grant and capital resources for the financial year 2025/26 and the financial implications are incorporated throughout. The report should be read in conjunction with the 2025/26 Budget, Medium Term Financial Plan 2025/26 to 2028/29, and Council Tax setting report and the Prudential Indicators and Treasury Management Strategy 2025/26 report presented to Council on 19 February 2025 to fully understand the financial position of the Council. In addition, it should be read in conjunction with as part of this agenda the Treasury Management Mid-Year Review 2025/26, Calculation of Council Tax Base for 2026/27.

Legal	The proposed recommendations are consistent with and will promote the achievement of the Council's general legal duty to achieve Best Value in accordance with Section 3 of the Local Government Act 1999 (as amended by s137 of the Local Government & Public Involvement in Health Act 2007).
Risk	In line with the Council's Risk Management Policy, the corporate Strategic Risk Register will be reported to this Executive as part of the Corporate Performance Quarter Two 2025/26 report.
Human Rights, Public Sector Equality Duty and Community Cohesion	The complete overall impact assessment included in Appendix 3 of the 2025/26 budget report to Council on 19 February 2025, along with all the individual impact assessments found that there was a justified adverse impact from these proposals in order to ensure the Council is able to maintain a balanced budget and continue to meet its statutory obligations.
Reducing Poverty	The proposed recommendations in this report do not directly impact on Reducing Poverty.
Climate Change / Environmental	The proposed recommendations in this report do not directly impact on Climate Change/Environmental issues.
Children and Young People Cared for by the Authority and Care Leavers	The proposed recommendations in this report do not directly impact on Children and Young People Cared for by the Authority and Care Leavers.
Data Protection	The proposed recommendations in this report do not directly impact on Data Protection issues.

Actions to be taken to implement the recommended decision(s)

Action	Responsible Officer	Deadline
Subject to approval by Executive revenue budget virements detailed in Appendix 1 to be actioned.	Head of Financial Planning & Business Partnering	31/12/25
Subject to approval by Executive, amendments to the capital programme for 2025/26 to be actioned.	Head of Financial Planning & Business Partnering	31/12/25
Corporate revenue budget spending controls will continue to be applied to Directorates in 2025/26.	Director of Finance and Transformation (s151 Officer)	31/3/26

Directors to continue refining and implementing their Financial Recovery Plans and mitigations in order to reduce their forecast budget pressures and seek to achieve a balanced budget for their Directorate by the end of 2025/26.	All Directors	31/3/26
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Appendices

1	Proposed revenue budget virements above £250,000 at Quarter Two 2025/26
2	Details of savings currently classified as unachievable at Quarter Two 2025/26
3	Detail of Forecast Reserves and Provisions Movements in 2025/26
4	Dedicated Schools Grant
5	Capital Programme Quarter Two 2025/26 – New External Funding, Additions to Council Funded Schemes, and Virements Between Schemes
6	Capital Programme Quarter Two 2025/26 – Details of capital slippage
7	Revised Capital Programme Forecasts 2025/26 to 2028/29

Background papers

Body	Report title	Date
Executive	2025/26 Budget, Medium Term Financial Plan 2025/26 to 2028/29, and Council Tax setting	5/2/25
Council	2025/26 Budget, Medium Term Financial Plan 2025/26 to 2028/29, and Council Tax setting	19/2/25
Council	Prudential Indicators and Treasury Management Strategy 2025/26 report	19/2/25
Council	Flexible Use of Capital Receipts Strategy 2025/26	26/3/25
Executive	2024/25 Outturn Report	11/6/25
Executive	Revenue and Capital Budget – Forecast Year-end Outturn position at Quarter One 2025/26	3/9/25

Contact: **Helen Dalby**
Head of Financial Planning & Business Partnering

Email: helen_dalby@middlesbrough.gov.uk

Appendix 1 : Proposed revenue budget virements above £250,000 at Quarter Two 2025/26
(under Financial Procedure Rule 18.38.3)

Proposed Virement Request	Regeneration	Environment & Community Services	Public Health	Education & Partnerships	Children's Care	Adult Social Care	Legal & Governance Services	Chief Executive	Finance	Central Budgets
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Permanent										
Technical adjustment for noting - already processed Allocation of 2025/26 Pay Award to Directorate budgets	0.209	0.798	-	0.203	0.752	0.552	0.323	0.007	0.290	(3.134)
Temporary										
Total Virement	0.209	0.798	-	0.203	0.752	0.552	0.323	0.007	0.290	(3.134)
									Total:	-

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Appendix 2 - Detail of savings currently classified as unachievable in 2025/26

Year Saving Initiative Introduce	Saving Reference	Saving Detail	Unachieved savings at Quarter Two £m	Reason for underachievement
Adult Social Care				
2024/25	ASC11	Re-provision use of Levick Court	0.191	Negotiations with Health are on-going - due to conclude Sept 2025, and due to time required to mobilise new service, no savings are anticipated in 25/26, however a one-off mitigation of (£0.120m) has been identified.
			0.191	
Children's Care				
2024/25	CS04 - in year	Reduction in agency costs	0.380	This saving was brought forward from 2024/25 unachieved savings. Numbers of agency Social work related posts are not reducing and there is also a forecast overspend against staffing.
2024/25	CS07 - in year	Introduce Supplier Incentive Scheme across Children's Care	0.031	This saving was brought forward from 2024/25 unachieved savings. To date, there has been minimal take up of early payments. (The full year effect of early payments required to achieve this savings would need to be £6.2m).
2025/26	CC01 24-25	Review of all Children's Care staffing	0.500	Unachieved due to demand increases in service areas identified as savings by consultant analysis and report/proposal
2025/26	CC01	Modernising Foster Care	1.518	Placements into residential care are currently increasing rather than decreasing, this saving was linked to reducing residential care placements, and increasing fostering placements instead.. Part of Recovery Plan for Children's Services is to increase fostering provision. Costs of young people identified as fostering long term placement have increased significantly.
2025/26	CC05	Maximising Grants across Children's Services	0.604	Bid writer post has left. Currently awaiting outcome of two bids and any impact if successful on 2025-26 financial position.
2025/26	CC04	Introduce Edge of Care Team	0.800	Reduction in numbers has not yet materialised, and placements into residential care are currently increasing rather than decreasing.
			3.833	
Education & Partnerships				
2025/26	EDC02	Deliver passenger assistance training internally	0.037	
2025/26	EDC03	Increase transport capacity	0.084	The majority of the budgeted savings are unachieved to date in 2025/26. Plans for achievement or replacement savings for the remainder of the financial year are currently updated and updates will be provided in future Quarterly reports.
2025/26	EDC04	Management Review	0.044	
2025/26	EDC05	Recharge Discretionary Home to School Transport Services	0.078	
2025/26	EDC07	Travel Training	0.102	
			0.345	
Regeneration				
2024/25	REG03	Review and implementation of alternative operating models for Captain Cook Birthplace Museum	0.075	It was assumed that the service would receive an annual contribution of (£0.150m) to keep the museum open, however following negotiations, only half of this will be received.
2024/25	REG07	Investing in better coordination of the way the Council provides housing to reduce the overall spend on emergency, temporary and short term accommodation for people	0.300	Whilst there are actions being undertaken which will address costs, the nature of the budgets which sit within other directorates and the increase in homeless cases will only result in cost reduction rather than budget savings. As mentioned in paragraph 4.24 this saving will be replaced permanently by an alternative saving.
			0.375	
Environment & Community Services				
2024/25	ECS05	Integrate Environment Services and Supporting Communities functions and create a Neighbourhood Management approach	0.111	Due to service growth, it has not been possible to achieve the full £0.287m saving, as in order to meet service demands, staffing numbers could not be reduced further. A saving of £0.195m was achieved in 2024/25.
2024/25	ECS08	Resident Parking Permits charge		- Temporary Virement to Contingency
2025/26	ECS13	Management Review	0.282	The Director of Environment and Community Services has delayed his review until the Senior Management Review across the Council has been completed. It is expected that the original saving will need to be re-configured due to growth and new service demands. It is now expected to commence in 2026/27.
			0.393	
Central				
2023/24	CEN02	Senior Management Review	0.244	Review has not yet been completed.
2024/25	FIN02	Review of Single Person Discount and Student Exemption for Council Tax	0.264	Saving will be realised in Collection Fund, not General Fund
2024/25	FIN03	Collection of Council Tax (Old Debt)	0.110	Saving will be realised in Collection Fund, not General Fund
2024/25	FIN04	Collection of Council Tax (Charging Orders)	0.504	Saving will be realised in Collection Fund, not General Fund
2024/25	FIN05	Collection of Business Rates	0.126	Saving will be realised in Collection Fund, not General Fund
2025/26	FIN13	Procurement Contract Management (Council wide)	0.700	Double count of saving FIN07 from 24/25 budget setting
			1.948	
TOTAL SAVINGS CURRENTLY CLASSIFIED AS UNACHIEVABLE IN 2025/26			7.085	

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Appendix 3 - Detail of Forecast Reserves and Provisions movements in 2025/26

	<u>Opening Balance 1/4/25</u>	<u>Forecast Use in Year</u>	<u>Projected Additional Contributions</u>	<u>Projected Transfers from / (to) General Fund</u>	<u>Projected Transfers between Reserves</u>	<u>Forecast Balance at year-end (before any adjustments for forecast outturn variance)</u>	<u>Forecast 2025/26 year end overspend</u>	<u>Forecast Balance at 31/3/26 (after adjustment for forecast outturn variance)</u>
	<u>£m</u>	<u>£m</u>	<u>£m</u>	<u>£m</u>	<u>£m</u>	<u>£m</u>	<u>£m</u>	<u>£m</u>
GENERAL FUND RESERVE	11.100	-	-	-	-	11.100	-	11.100
USABLE EARMARKED RESERVES								
<i>Restricted Use</i>								
Public Health	1.686					1.686		1.686
Insurance Fund	0.013		0.500			0.513		0.513
Better Care Fund	0.897					0.897		0.897
Marton Library S106	0.025					0.025		0.025
Housing Rental Sinking Fund	0.068					0.068		0.068
	2.689	-	0.500	-	-	3.189	-	3.189
<i>Unrestricted Use</i>								
Financial Resilience Reserve	6.711		2.836		1.000	10.547		10.547
Legacy Accounts Reserve	1.000				(1.000)	-		-
Savings Delivery Risk Reserve	-		3.052			3.052	(1.804)	1.248
Change Fund	2.766					2.766		2.766
Elections Costs	0.077		0.070			0.147		0.147
	10.554	-	5.958	-	-	16.512	(1.804)	14.708
	13.244	-	6.458	-	-	19.702	(1.804)	17.898
UNUSABLE EARMARKED RESERVES								
Revenue Grants Unapplied (Technical Reserve)	5.400					5.400		5.400
Dedicated Schools Grant Adjustment Account	(22.213)	(9.000)				(31.213)		(31.213)
	(16.813)	(9.000)	-	-	-	(25.813)	-	(25.813)
SCHOOL BALANCES	3.050	-	-	-	-	3.050	-	3.050
PROVISIONS								
Business Rates Appeals	1.041					1.041		1.041
Insurance	2.606					2.606		2.606
Other	0.167					0.167		0.167
	3.814	-	-	-	-	3.814	-	3.814
	14.395	(9.000)	6.458	-	-	11.853	(1.804)	10.049

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Appendix 4

Dedicated Schools Grant

1. The DSG conditions of grant require that any local authority with an overall deficit on its DSG account at the end of financial year 2021/22, or who's DSG surplus had substantially reduced, present a plan to the DfE for managing its DSG spend in 2022/23 and future years and commit to reducing the deficit. There is also a requirement to provide information as and when requested by the DfE about pressures and potential savings on its High Needs budget.
2. The Council complete regular DSG management recovery plans to outline forecasts over the next 5 years. The Council continues working with the DfE and have received a Stage 1 grant of £45,000 and a Stage 2 grant of £1m for the "Delivering Better Value" (DBV) programme that is supporting work to reduce the ongoing pressures within the High Needs Block using best practice and benchmarking across the country. This funding is due to expire in summer 2025. Within this programme it has been identified that, to be successful, inclusion in mainstream schools needs to improve. DBV is a long-term programme and 55 other local authorities as well as Middlesbrough Council are participating in the DBV programme. It should be noted that Middlesbrough Council is not involved in the "Safety Valve" programme, which is support for those local authorities with the greatest DSG deficits.
3. DfE also expect that schools be regularly updated via the Schools Management Forum about the authority's DSG account and plans for handling it, including high needs pressures and potential savings.
4. The DBV programme (which commenced in September 2023) highlighted there were risks to the programme outcomes without significant change, regarding inclusion in mainstream schools. Inclusion within mainstream has remained a challenge, which has resulted in continued increased demand for specialist provision for children with an Education, Health and Care Plan (EHCP) and alternative provision for those children and young people who are permanently excluded. This has resulted in increasing numbers of over commissioned places, the financial impact of which is pressure to provide additional place funding alongside high needs top up to meet the individual needs of the pupils. There have also been rate increases from specialist providers. The number of commissioned Alternative Provision placements has also increased to meet rising demand from the significantly high rates of exclusion; this again places additional financial pressure on the High Needs Block.
5. A range of management actions are being taken alongside the DBV programme these include initiatives such as:
 - Launch of Special Educational Needs & Disabilities (SEND) and Inclusion clinics in all schools to review how they are using their notional SEND budget as well as identifying training and support required within the setting.
 - Work with health colleagues to identify health contributions where relevant,
 - On-going reviews of Education, Health, and Care Plans (EHCPs)

- Dedicated training for school staff to support inclusive practice,
 - On going work with school to prioritise the reintegration of excluded pupils into mainstream school where possible
 - Review of funding provided to schools including special schools,
 - Continued early intervention and prevention work with schools to reduce exclusions,
 - Review of maintained schools' reserves and updated policy for challenging the use of those reserves
 - New Free School to be built by September 2026 which will support more children access local provision.
 - Ongoing development of local provision to meet needs and reduce the number of out of area placements,
 - Greater support during transitions
6. Regular meetings take place with the DfE and the DBV lead to monitor the actions within our DBV plan. Regular monitoring reports are also produced in line with the DBV grant conditions. The pressures on the High Needs Block are highlighted as part of this process to ensure the DfE are fully aware of the ongoing pressures within Middlesbrough.
7. The increasing pressure in DSG and the High Needs Block is due to the fact that alongside social care, the Service has seen, and is predicting, an increase in more complex placements with a forecast increase in Education, Health, and Care plans (EHCPs) in the future. In Middlesbrough, the number of EHCPs have increased from 1,659 in 2022 and 1,804 in 2023 to a current level of 2,040 in January 2025, an 8% increase between start of 2024 to 2025. It should be noted that the number of children with an EHCP is also a key cost driver in relation to home to school transport costs that are met by the General Fund through the Integrated Transport Unit. Some children in Alternative Provision are also a factor in relation to home to school transport costs. In 2022 132 children accessed Alternative Provision and in 2023 the figure was 175, and this figure has currently risen to 297. This is a national issue affecting many local authorities and presents a growing and significant financial risk to the Council. The Government have partly recognised this by an increase in funding allocated in the finance settlements in recent years for both Schools and High Needs Blocks. However, no specific funding has been provided in recognition of the adverse impact upon the General Fund cost of home to school transport.
8. Table 1 below shows the actual and forecast Education, Health, and Care plans (EHCPs), and is periodically being updated and used to calculate the forecasted increase in required demand on alternative provision services and also the Council's SEND transport requirements and also used to inform updates of the DSG Management Plan for Middlesbrough.

Table 1 – Actual and forecast Education, Health, and Care plans (EHCPs)

Year	2022	2023	2024	2025	2026	2027
Number of EHCP – actual and forecast	1,659	1,804	1,881	2,040	2,046	2,147

9. Table 2 shows forecasted in year position for the overall DSG position including the High Needs block affected by the above.

Table 2 – forecast Income and expenditure for DSG blocks in year and forecast balance position at 31st March 2026

	2025/26 Forecast Income	2025/26 Forecast Expenditure	2025/26 Forecast Year-end Overspend	Balance as at 31/03/2025	Forecast Cumulative DSG Deficit as at 31/03/2026
	£m	£m	£m	£m	£m
Early years Block	22.674	22.674	0.000	(0.749)	(0.749)
Schools Block*	12.526	12.526	0.000	(0.490)	(0.490)
High Needs Block*	33.910	42.910	9.000	23.515	32.515
Central school services Block	1.136	1.136	0.000	(0.063)	(0.063)
TOTAL	70.246	79.246	9.000	22.213	31.213

* the income figures include the 0.5% (£751k) transfer from schools block to High Needs block agreed at School Management Forum 15th January 2025

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Appendix 5 : Capital Programme Quarter Two 2025/26 - new externally funded schemes / additional external funding to existing schemes, additions to Council funded schemes, and virements between schemes

Directorate	Scheme	Total Value 2025/26 £m	Total Value Future Years £m	Reason	Total Change to Capital Programme £m	External Funding £m	Council Funding £m
<u>New Externally Funded Schemes / Additional External Funding To Existing Schemes</u>							
Regeneration	New Museum Stewart Park Feasibility Study	0.025	-	Provision of external funding for feasibility works regarding a proposed new museum.	0.025	0.025	-
	Total Regeneration	0.025	-		0.025	0.025	-
Environment and Community Services	Libraries Improvement Fund	0.025	-	Additional grant provided from the Arts Council.	0.025	0.025	-
	Total Environment and Community Services	0.025	-		0.025	0.025	-
Education and Partnerships	New Secondary SLD Provision (Discovery)	0.300	-	The Department for Education has provided the Council with an additional £0.300m for the provision of a new Discovery Special Academy nursery.	0.300	0.300	-
Education and Partnerships	Other Small Scale Additions	0.104			0.104	0.104	-
	Total Education and Partnerships	0.404	-		0.404	0.404	-
	TOTAL ALL DIRECTORATES	0.454	-		0.454	0.454	-
<u>Additions To Council Funded Schemes</u>							
Environment and Community Services	Bereavement Services PlotBox System	0.065	-	Acquisition of a ICT system PlotBox to enable funeral directors to book cremations online.	0.065	-	0.065
	Total Environment and Community Services	0.065	-		0.065	-	0.065
	TOTAL ALL DIRECTORATES	0.065	-		0.065	-	0.065
<u>Virements Within Directorates</u>							
Regeneration	De-Risking Sites	(0.871)	-	There has been a longstanding dispute in respect of a compulsory purchase order undertaken for a business at Middlehaven. The owner was claiming significantly more compensation than the Council deemed appropriate. In order to defend it's position the Council needed to procure expert legal advice and King's Counsel. The virement is to fund the costs of the advice. The hearing has now concluded, the Court awarded the owner some additional compensation and their legal fees were payable by the Council. Whilst paying some additional compensation, the Council saved in excess of £6m, inclusive of interest payments, when comparing to the amount the owner was claiming.	(0.871)	-	(0.871)
Regeneration	Site Assembly At Middlehaven	0.871	-		0.871	-	0.871
Regeneration	De-Risking Sites	(0.105)	-	The virement is required to pay for external expert support for the Council to rebuff a claim from a contractor in relation to a house build contract at Middlehaven. This dispute has now been resolved with the contractor withdrawing its claim, saving the Council approximately £1m.	(0.105)	-	(0.105)
Regeneration	Middlesbrough Development Company	0.105	-		0.105	-	0.105
	Total Regeneration	-	-		-	-	-
Transformation	Transformation / Subject Matter Expertise	0.500	0.362	Virement of funds, predominantly from Contingency to fund newly approved and / or the continuation of transformational initiatives.	0.862	-	0.862
Transformation	Contingency	(0.500)	(0.358)		(0.858)	-	(0.858)
Transformation	Neighbourhood	-	(0.004)		(0.004)	-	(0.004)
	Total Transformation	-	-		-	-	-
	TOTAL ALL DIRECTORATES	-	-		-	-	-

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Appendix 6 : Capital Programme Quarter Two 2025/26 – Details of capital slippage

Capital slippage is a way of reprofiling capital budgets between financial years to match forecast timing of expenditure, whilst staying within the approved project budget.

The following details the slippage during Quarter Two. Details of slippage at Quarter 1 of £8.228m was shown in Appendix 6 of the respective budget monitoring report. These added together total the £20.095m total slippage for 2025/26 as at the end of Quarter Two.

APPENDIX 6

Directorate	Scheme	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	Funding Source	Slippage Explanation
Regeneration	Towns Fund	(3.939)	3.939	-	-	Grant / Borrowing	The tender for the works at the Old Town Hall has now been awarded, however, there have been delays in the signing of the contract, this has resulted in £2.050m of funds being re-profiled into 2026/27. The Council is in discussions with an external partner with regard to investing in properties to alleviate homelessness. If the discussions are successful the Council will seek to contract with the partner. It is likely that the costs of this scheme will be incurred in 2026/27, as such £2.584m has been reprofiled. The contractor for the creation of Nunthorpe Community Centre is now on site, a works / cost plan is in place, £0.695m of future year funding has been brought into 2025/26 to fund the scheme.
Regeneration	Newham Hall - Housing Growth	-	(2.000)	2.000	-	Borrowing	This is a large scheme with various elements of the scheme works being undertaken in different phases. The costs and timing are reviewed regularly, with the overall scheme now anticipated to conclude in 2027/28, funds have been reprofiled to reflect this.
Regeneration	Acquisition of Town Centre Properties	-	(1.000)	1.000	-	Borrowing	There are no current plans to acquire properties, the funds have been re-allocated to reflect this.
Regeneration	Housing Growth	0.031	(0.484)	0.453	-	Borrowing	All of the active housing sites have the appropriate level of funds in place, the balance of funds has been reprofiled for use as and when further sites are identified.
Regeneration	Derisking Sites	0.976	(0.105)	(0.871)	-	Borrowing	The funding has been brought forward in order to settle legal costs and compensation payments totalling £0.871m in relation to a long standing compulsory purchase order settlement claim that was disputed by the owner of a car breaking and parts sale site at Middlehaven. Additionally, the Council was required to employ legal experts to defend it's position regarding costs that a house building contractor was attempting to claim which were in excess of the agreed contract. Collectively, whilst the cost of external legal / counsel support is expensive, the Council ultimately saved in excess of £6m when comparing the amounts paid to the respective parties against the amounts claimed.
Regeneration	Cemetery Provision	(0.006)	0.514	(0.508)	-	Borrowing	The Council's external consultants have assessed and revised the timescale of the works, resulting in the greater majority now completing in 2026/27.
Regeneration	Other Small Scale Slippage Across The Directorate	0.095	(0.095)	-	-	Borrowing	
	Regeneration Total	(2.843)	0.769	2.074	-		
Environment and Community Services	Purchase of Vehicles	0.908	(0.908)	-	-	Borrowing	The purchase of additional refuse vehicles in order to comply with the government's directive to introduce food waste and simpler recycling collection has resulted in the need to bring forward resource from future years.
Environment and Community Services	City Regional Sustainable Transport Scheme - Highways Maintenance	(0.500)	0.500	-	-	Borrowing	Delays to the contract process have been experienced due to internal capacity issues. This has resulted in the re-profiling of funds.
Environment and Community Services	Bridges and Structures	(1.000)	-	1.000	-	Borrowing	Delays to the contract process have been experienced due to internal capacity issues. This has resulted in the re-profiling of funds.
Environment and Community Services	Highways Infrastructure	-0.600	0.600	-	-	Borrowing	Delays to the contract process have been experienced due to internal capacity issues. This has resulted in the re-profiling of funds.
Environment and Community Services	Linthorpe Road Cycleway Removal	(1.169)	1.169	-	-	Grant	The contractor has not been able to commence work on the original estimated start date. This will result in the work not being completed until 2026/2027.
Environment and Community Services	City Regional Sustainable Transport Scheme - Incentive Funding	(0.400)	0.400	-	-	Grant	Some project specifications are now expected to be finalised later than planned. A proportion on the grant allocation will now not be spent until 2026/27.
Environment and Community Services	Other Small Scale Slippage Across The Directorate	(0.199)	0.199	-	-	Grant	
	Environment and Community Services Total	(2.960)	1.960	1.000	-		
Education and Partnerships	Basic Need Block Budget	(2.439)	2.439	-	-	Grant	The Education capital programme for 2025/26 has been agreed and costed. The remaining funds within the block budget have been re-profiled and are anticipated to be expended when the 2026/27 programme of works is agreed.
Education and Partnerships	Contribution to New School at Middlehaven	(0.455)	0.455	-	-	Grant / Contributions	The Council's contributions to the scheme are agreed based on milestones associated with the scheme. The Department of Education have experienced delays which have resulted in the Council now making one of the phased payments in 2026/27 rather than 2025/26.
Education and Partnerships	Unity City Academy Bulge Scheme	(1.178)	1.178	-	-	Grant	It is now deemed unlikely that the scheme will commence in 2025/26 as originally anticipated. The funds have been re-profiled accordingly.
Education and Partnerships	Macmillan extension SEND classrooms	(0.300)	0.300	-	-	Grant	Following changes within the school there are now internal limitations on what can be achieved within the physical space. This has meant that the whole project has needed to be reviewed as priorities have changed. As such, the previously assumed planned expenditure will not bow be incurred in 2025/26..
Education and Partnerships	Acklam Grange - Conversion of caretakers accommodation	(0.454)	0.454	-	-	Grant	The trust are advising that they now intend to submit planning permission for the conversion in February 2026 and are expecting a decision regarding their application for the 4G pitch in December 2025. The anticipated works within this financial year have been reassessed based on these dates with costs revised accordingly, resulting in the re-profiling of funds.
		(4.826)	4.826	-	-		
Legal and Governance Services	Other Small Scale Slippage Across The Directorate	0.139	(0.139)	-	-	Borrowing	
	Legal and Governance Services Total	0.139	(0.139)	-	-		
Finance	Other Small Scale Slippage Across The Directorate	(0.009)	0.009	-	-	Borrowing	
	Finance Total	(0.009)	0.009	-	-		

Transformation	Transformation / Subject Matter Expertise	(0.320)	0.297	0.023	-	Borrowing	There are a number of individual schemes where re-profiling into future years is required.
Transformation	Neighbourhood	(0.648)	0.424	0.224	-	Borrowing	A report is due to be presented to Executive regarding the proposals in respect of the Neighbourhood capital expenditure, upon agreement the physical works to the buildings can be undertaken, which are now expected to begin in 2026/27. The overall Neighbourhood allocation has reduced slightly as a consequence of job evaluation of the new roles.
Transformation	ICT	(0.400)	0.400	-	-	Borrowing	Whilst ICT solutions are currently being assessed, it is not envisaged that there will be significant purchases within the financial year.
	Transformation Total	(1.368)	1.121	0.247	-		
	TOTAL	(11.867)	8.546	3.321	-		

Appendix 7 : Revised Capital Programme Forecasts 2025/26 to 2028/29

	Forecast Expenditure					Council Funding	External Funding
	2025/26	2026/27	2027/28	2028/29	TOTAL	£m	£m
Regeneration	£m	£m	£m	£m	£m	£m	£m
Town Centre Related Projects	0.083	-	-	-	0.083	0.083	-
Middlehaven Related Projects	0.871	-	-	-	0.871	0.871	-
Housing Growth	0.061	0.140	0.453	-	0.654	0.654	-
Newham Hall	1.340	9.892	2.000	-	13.232	4.094	9.138
BOHO X	0.418	-	-	-	0.418	0.042	0.376
Indigenous Growth Fund - Captain Cook Square	1.441	1.541	-	-	2.982	-	2.982
Towns Fund	2.114	9.670	-	-	11.784	1.125	10.659
Towns Fund - East Middlesbrough Community Hub	3.519	1.340	-	-	4.859	1.940	2.919
Acquisition of Town Centre Properties	-	-	1.000	-	1.000	1.000	-
Acquisition of The Crown	0.005	-	-	-	0.005	0.005	-
Levelling Up Partnership	4.451	4.776	-	-	9.227	0.081	9.146
New Civic Centre Campus	-	0.237	-	-	0.237	0.237	-
Middlesbrough Development Company	0.105	-	-	-	0.105	0.105	-
Capitalisation of Major Schemes Salaries	0.530	0.530	0.530	0.530	2.120	2.120	-
Capitalisation of Planning Services Surveys	0.086	0.050	0.009	-	0.145	0.145	-
Affordable Housing Via Section 106	-	1.495	2.360	2.361	6.216	0.302	5.914
Highways Infrastructure Development Section 106	-	0.722	1.752	1.752	4.226	0.142	4.084
Levelling Up Fund - South Middlesbrough Accessibility	3.470	1.000	-	-	4.470	-	4.470
Middlesbrough College Investment	1.600	-	-	-	1.600	1.600	-
Derisking Sites	0.063	0.759	0.429	1.300	2.551	2.551	-
Property Services Building Investment	0.340	0.340	0.340	0.340	1.360	1.360	-
Property Asset Investment Programme	1.902	2.811	1.500	1.500	7.713	7.713	-
Town Hall Roof	-	2.956	-	-	2.956	2.956	-
Municipal Buildings Refurbishment	0.257	0.891	-	-	1.148	1.148	-
Resolution House	-	0.482	-	-	0.482	0.482	-
Cleveland Centre	0.748	0.226	-	-	0.974	0.974	-
Cemetery Provision	0.344	2.014	0.030	-	2.388	2.388	-
Investment In Parks	0.007	-	-	-	0.007	0.007	-
Cultural Development Fund - Enhancements to Central Library & Partner Organisations	2.309	-	-	-	2.309	0.090	2.219
Museum Estate and Development Fund	0.001	-	-	-	0.001	-	0.001
New Museum at Stewart Park Feasibility Study	0.025	-	-	-	0.025	-	0.025
Total Regeneration	26.090	41.872	10.403	7.783	86.148	34.215	51.933

Appendix 7 : Revised Capital Programme Forecasts 2025/26 to 2028/29

	Forecast Expenditure				
	2025/26	2026/27	2027/28	2028/29	TOTAL
	£m	£m	£m	£m	£m
Environment and Community Services					
Purchase of New Vehicles	4.475	0.292	1.200	1.200	7.167
Capitalisation of Wheeled Bin Replacement	0.100	0.100	0.100	0.100	0.400
Capitalisation of Street Furniture / Dog Fouling & Litter Bins	0.055	0.055	0.055	0.055	0.220
Capitalisation of Highways Maintenance	0.575	0.575	0.575	0.575	2.300
City Regional Sustainable Transport Scheme - Highways Maintenance	3.495	2.839	-	-	6.334
City Regional Sustainable Transport Scheme - Incentive Funding	1.055	1.691	-	-	2.746
Street Lighting-Maintenance	0.585	0.468	0.468	0.468	1.989
Urban Traffic Management Control 1	0.033	-	-	-	0.033
Flood Prevention	-	0.090	-	-	0.090
Section 106 Ormesby Beck	-	0.015	-	-	0.015
Bridges and Structures	1.125	3.380	3.650	4.798	12.953
Newport Bridge	0.877	0.500	-	-	1.377
CCTV	0.010	-	-	-	0.010
Towns Fund Initiatives	0.016	-	-	-	0.016
Traffic Signals -Tees Valley Combined Authority	0.029	-	-	-	0.029
Highways Infrastructure	0.771	0.600	-	-	1.371
Libraries Improvement Fund	0.031	-	-	-	0.031
Urban Traffic Management Control 2	0.389	-	-	-	0.389
Traffic Signals Non Tees Valley Combined Authority	0.516	-	-	-	0.516
Traffic Signals Obsolescence Grant	1.877	-	-	-	1.877
FUSION adaptive travel control solution	0.372	-	-	-	0.372
Food Waste Collection	1.076	-	-	-	1.076
Street Lighting Column Replacement	0.209	0.363	-	-	0.572
Levelling Up Partnership - Neighbourhood Safety	0.915	-	-	-	0.915
Section 106 Marton West Beck	-	0.094	-	-	0.094
Community Recovery Fund	0.033	-	-	-	0.033
Parks Playzones	0.125	-	-	-	0.125
Members Small Schemes	0.060	0.210	0.060	0.060	0.390
Linthorpe Road Cycleway Removal	1.000	1.169	-	-	2.169
Carriageway Resurfacing Programme	0.187	0.687	-	-	0.874
Footways Repairs Programme	0.100	0.500	-	-	0.600
Regulatory Services ICT System	0.466	0.356	-	-	0.822
Section 106 Stewart Park	0.032	-	-	-	0.032
Simpler Recycling	1.515	-	-	-	1.515
Bereavement Services Plot box System	0.065	-	-	-	0.065
Total Environment and Community Services	22.169	13.984	6.108	7.256	49.517

Council Funding	External Funding
£m	£m
7.167	-
0.400	-
0.220	-
2.300	-
-	6.334
-	2.746
1.989	-
-	0.033
-	0.090
-	0.015
12.953	-
1.377	-
0.010	-
-	0.016
-	0.029
1.371	-
-	0.031
-	0.389
0.516	-
-	1.877
-	0.372
-	1.076
0.572	-
-	0.915
-	0.094
-	0.033
-	0.125
0.390	-
-	2.169
0.874	-
0.600	-
0.822	-
-	0.032
1.515	-
0.065	-
33.141	16.376

	Forecast Expenditure	
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Council	External
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Appendix 7 : Revised Capital Programme Forecasts 2025/26 to 2028/29

	2025/26	2026/27	2027/28	2028/29	TOTAL
Public Health	£m	£m	£m	£m	£m
Live Well East – Internal Alterations and Improvements	0.010	-	-	-	0.010
Swimming Pool Support Fund	0.182	-	-	-	0.182
Middlesbrough Sports Village Full Size 3g Pitch Repair	0.507	-	-	-	0.507
Neptune Leisure Centre Boiler Replacement	0.172	-	-	-	0.172
Leisure Trust Investment - Equipment	0.071	-	-	-	0.071
Total Public Health	0.942	-	-	-	0.942

Funding	Funding
£m	£m
-	0.010
-	0.182
0.507	-
0.172	-
0.071	-
0.750	0.192

	Forecast Expenditure				
	2025/26	2026/27	2027/28	2028/29	TOTAL
Education and Partnerships	£m	£m	£m	£m	£m
Block Budget - Family Hubs	0.003	-	-	-	0.003
Block Budget - Devolved Formula Capital (DFC) - All Schools	0.097	-	-	-	0.097
Block Budget - School Condition Allocation (SCA)	0.014	0.737	-	-	0.751
Block Budget - Basic Need	-	2.439	-	-	2.439
Block Budget - High Needs Provision Capital Allocation (HNCPA)	0.409	1.426	-	-	1.835
Block Budget - Early Years 2 years old entitlement	0.001	-	-	-	0.001
Section 106 - Lowgill	0.035	-	-	-	0.035
Contingency Funding Reserve	0.105	-	-	-	0.105
Building Condition Improvements - Primary School	0.424	0.010	-	-	0.434
Building Condition Improvements - Special Schools	0.028	0.005	-	-	0.033
School Led Capital schemes - All Maintained Schools	0.148	0.100	-	-	0.248
Sufficiency Schemes - Primary	0.315	0.185	-	-	0.500
Sufficiency Schemes - Secondary	1.130	2.379	-	-	3.509
Sufficiency Schemes - Special Educational Needs & Disabilities (SEND) and Alternative Education	1.784	0.854	-	-	2.638
Special Educational Needs (SEN) Small Capital Grant Schemes	0.255	-	-	-	0.255
Family Hubs and Early Years	0.042	-	-	-	0.042
Capitalisation of Salary Costs	0.123	0.127	-	-	0.250
Total Education and Partnerships	4.913	8.262	-	-	13.175

Council Funding	External Funding
£m	£m
-	0.003
-	0.097
-	0.751
-	2.388
-	1.783
-	0.001
-	0.035
-	0.105
0.043	0.391
-	0.033
-	0.248
-	0.500
0.646	2.863
-	2.741
-	0.255
-	0.042
-	0.250
0.689	12.486

	Forecast Expenditure				
	2025/26	2026/27	2027/28	2028/29	TOTAL
Children's Care	£m	£m	£m	£m	£m
Gleneagles Refurbishment	0.030	-	-	-	0.030
Children's Services Financial Improvement Plan	0.791	-	-	-	0.791
Total Children's Care	0.821	-	-	-	0.821

Council Funding	External Funding
£m	£m
0.030	-
0.550	0.241
0.580	0.241

	Forecast Expenditure				
	2025/26	2026/27	2027/28	2028/29	TOTAL

Council Funding	External Funding
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Appendix 7 : Revised Capital Programme Forecasts 2025/26 to 2028/29

Adult Social Care	£m	£m	£m	£m	£m
Chronically Sick & Disabled Persons Act - All schemes	1.080	0.935	1.000	1.070	4.085
Disabled Facilities Grant - All schemes	2.674	0.684	-	-	3.358
Capitalisation of Staying Put Salaries	0.050	0.050	0.050	0.050	0.200
Home Loans Partnership (Formerly 5 Lamps)	0.067	-	-	-	0.067
Small Schemes	0.034	-	-	-	0.034
Total Adult Social Care	3.905	1.669	1.050	1.120	7.744

£m	£m
3.899	0.186
-	3.358
0.200	-
-	0.067
-	0.034
4.099	3.645

	Forecast Expenditure				
	2025/26	2026/27	2027/28	2028/29	TOTAL
Legal and Governance Services	£m	£m	£m	£m	£m
Desktop Strategy / Device Refresh	0.182	-	-	-	0.182
Enterprise Agreements	0.908	-	-	-	0.908
IT Refresh - Network Refresh	0.194	-	-	-	0.194
IT Refresh - Lights On	0.259	-	-	-	0.259
ICT Essential Refresh & Licensing	0.295	1.836	2.185	2.185	6.501
SharePoint	0.092	-	-	-	0.092
HR Recruitment	0.021	-	-	-	0.021
Iken Legal Case Management System	0.027	-	-	-	0.027
HR Pay	-	0.037	-	-	0.037
Total Legal & Governance Services	1.978	1.873	2.185	2.185	8.221

Council Funding	External Funding
£m	£m
0.182	-
0.908	-
0.194	-
0.259	-
6.501	-
0.092	-
0.021	-
0.027	-
0.037	-
8.221	-

	Forecast Expenditure				
	2025/26	2026/27	2027/28	2028/29	TOTAL
Finance	£m	£m	£m	£m	£m
Former Partnership Investment (ICT Infrastructure Revenues & Benefits)	0.016	0.248	-	-	0.264
Business World Upgrade	0.028	-	-	-	0.028
Capitalisation of Property Finance Lease Arrangements	0.150	0.150	-	-	0.300
Total Finance	0.194	0.398	-	-	0.592

Council Funding	External Funding
£m	£m
0.264	-
0.028	-
0.300	-
0.592	-

	Forecast Expenditure				
	2025/26	2026/27	2027/28	2028/29	TOTAL

Council Funding	External Funding
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Appendix 7 : Revised Capital Programme Forecasts 2025/26 to 2028/29

Transformation Programme	£m	£m	£m	£m	£m
Transformation / Subject Matter Expertise	4.687	2.870	0.107	-	7.664
Neighbourhood	0.498	3.980	2.560	-	7.038
Redundancy	0.347	0.200	-	-	0.547
ICT	0.350	2.650	1.500	-	4.500
Contingency	0.250	1.127	1.127	-	2.504
Total Transformation	6.132	10.827	5.294	-	22.253

£m	£m
7.664	-
7.038	-
0.547	-
4.500	-
2.504	-
22.253	-

	Forecast Expenditure				
	2025/26	2026/27	2027/28	2028/29	TOTAL
ALL DIRECTORATES	£m	£m	£m	£m	£m
Total ALL DIRECTORATES	67.144	78.885	25.040	18.344	189.413

Council Funding	External Funding
£m	£m
104.540	84.873

	Forecast Expenditure				
	2025/26	2026/27	2027/28	2028/29	TOTAL
FUNDED BY:	£m	£m	£m	£m	£m
Borrowing	18.735	21.687	3.074	-	43.496
Capital Receipts	6.000	6.000	12.560	14.231	38.791
Flexible Use of Capital Receipts	6.132	10.827	5.294	-	22.253
Grants	35.339	33.059	-	-	68.398
Contributions	0.938	7.312	4.112	4.113	16.475
					-
Total FUNDING	67.144	78.885	25.040	18.344	189.413

Council Funding	External Funding
£m	£m
43.496	-
38.791	-
22.253	-
-	68.398
-	16.475
104.540	84.873

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MIDDLESBROUGH COUNCIL	
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Report of:	Andrew Humble - Director of Finance and Transformation (s151 Officer)
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Relevant Executive Member:	Cllr Nicky Walker - Executive Member for Finance
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Submitted to:	Executive
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Date:	3 December 2025
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Title:	Calculation of Council Tax Base for 2026/27
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Report for:	Decision
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Status:	Public
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Council Plan priority:	All
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Key decision:	Yes
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Why:	Decision(s) will incur expenditure or savings above £250,000 and have a significant impact in two or more wards
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Subject to call in?	Yes
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Why:	Non-Urgent Report
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Proposed decision(s)	
That the Executive:	
• NOTES the contents of the report • APPROVES the council tax base for 2026/27 for the whole of Middlesbrough area as 37,062.20 • APPROVES 2,408.72 and 1,530.35 as the council tax bases for the parishes of Nunthorpe and Stainton & Thornton respectively for 2026/27 • Following approval, AGREES to notify the Police and Crime Commissioner, the Cleveland Fire Authority, and the Parish Councils of the 2026/27 council tax base	

Executive summary	
The Council has a legal obligation to calculate a council tax base each financial year. The calculation of the council tax base is a part of the Council's budget strategy which forms part of the Council's Policy Framework. This report is part of the process to set the council tax base for the financial year 2026/27 by the statutory deadline of 31 January 2026.	

1. Purpose of this report and its contribution to the achievement of the Council Plan ambitions

- 1.1 The report is part of the process to set the council tax base for the financial year 2026/27 by the statutory deadline of 31 January 2026.

Our ambitions	Summary of how this report will support delivery of these ambitions and the underpinning aims
A successful and ambitious town	The calculation of the council tax base is a part of the Council's budget strategy which forms part of the Council's Policy Framework and underpins the delivery of the Council's vision for Middlesbrough and therefore supports all the ambitions within the Council Plan.
A healthy Place	
Safe and resilient communities	
Delivering best value	

2. Recommendations

2.1 That the Executive:

- **NOTES** the contents of the report
- **APPROVES** the council tax base for 2026/27 for the whole of Middlesbrough area as **37,062.20**
- **APPROVES 2,408.72 and 1,530.35** as the council tax bases for the parishes of Nunthorpe and Stainton & Thornton respectively for 2026/27
- Following approval, **AGREES** to notify the Police and Crime Commissioner, the Cleveland Fire Authority, and the Parish Councils of the 2026/27 council tax base

3. Rationale for the recommended decision(s)

3.1 The recommendations are supported by the following reasons: -

- a) The Local Government Finance Act 1992 requires a billing authority to calculate its council tax base for each financial year.
- b) The method of calculation is specified in the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012, which requires the calculation to be approved before 31st January in the year preceding the relevant financial year.

4. Background and relevant information

- 4.1 The Council has a legal obligation to calculate a council tax base each financial year. The calculation of the council tax base is a part of the Council's budget strategy which forms part of the Council's Policy Framework.
- 4.2 The starting point for the calculation of the 2026/27 tax base is the number of dwellings on the Valuation List for Middlesbrough Council on 10 September 2025 provided by the Government's Valuation Office Agency (line 1 of Appendix 1). The figures are also adjusted for exempt dwellings and for dwellings subject to disabled reduction.

- 4.3 The number of chargeable dwellings in each band is further adjusted for discounts, exemptions, premiums, and local council tax support.
- 4.4 The resultant figure (line 2) is the total equivalent number of dwellings which are then converted using ratios (in line 3) into the number of Band D equivalents (line 4), specified in the 1992 Act. For 2026/27, the equivalent number of Band D properties is calculated at **37,703.15**.
- 4.5 The council tax base is finally determined by multiplying the sum of the Band D equivalents (line 4) by the Authority's estimated collection rate, which has been assumed at 98.3% for 2026/27. This is the estimate of the percentage of the 2026/27 Council Tax set which will be collected in total, and not the expected in-year collection rate in 2026/27. The rate used is re-considered each year and the rate of 98.3% used for 2026/27 is the same as that used for 2025/26. The resulting council tax base for 2026/27 for the whole of Middlesbrough (Appendix 1) is **37,062.20**, rounded to two decimal places.
- 4.6 The growth in the council tax base is estimated to have reduced the need for budget reductions and provided funding for investment in service budget growth in line with the Mayor's priorities of approximately £1.138m in 2026/27 and on an ongoing basis, based on the 2025/26 Basic Council Tax.
- 4.7 Since 2013/14 the Council's Housing Growth Strategy has delivered an increase in the Council Tax Base of 6,891 Band D Equivalent properties, an increase in Middlesbrough Council's Tax Base of approximately 23%. The cumulative effect is approximately £14.3m and reduces the need to make further annual savings within Council services and allows investment in service budget growth in line with the Mayor's priorities.
- 4.8 A comparison with the 2025/26 council tax base is summarised in the table below:

	2025/26	2026/27	Increase / (Decrease)	Increase / (Decrease) %
Total number of dwellings on the Valuation List on 10 September 2025	66,379	66,497	118	0.2
<i>less Number of dwellings exempt on 6 October 2025</i>	3,058	2,970	(88)	(2.9)
<i>less Number of demolished dwellings on 6 October 2025</i>	131	0	(131)	(100.0)
Number of chargeable dwellings (after removing exempt and demolished dwellings)	63,190	63,527	337	0.5
Total number of dwellings after discounts, premiums, and local tax support	44,590.10	45,270.33	680.23	1.5
Band D Equivalents	37,145.40	37,703.15	557.75	1.5
Assumed Collection Rate	98.3%	98.3%		
Council Tax Base	36,513.90	37,062.20	548.30	1.5

- 4.9 The above table demonstrates that there is a net increase of 680.23 (1.5%) in the actual number of dwellings after discounts, premiums and local tax support for council tax base purposes, and after converting to Band D equivalents there is a net increase of 557.75 (1.5%) in the Band D equivalent. This is a result of new house building over the period. The net increase in the council tax base from 2025/26 is 548.30 (1.5%) band D equivalent properties, assuming the collection rate of 98.3% for 2026/27.
- 4.10 It should be noted that as can be seen in line 1 of Appendix 1, 49.7% of Middlesbrough households are in Band A and approximately 85% of Middlesbrough households are in Band A to C and pay less than the Band D Council Tax. This is a higher proportion than the national Band A to C percentage and means that a greater proportion of our residents pay a Band A to C than comparable Councils. This means that a higher rate of Council Tax is needed to raise the same income yield compared with many other Councils. Middlesbrough Council was in the lower quartile in England for Average Council Tax Per Dwelling at £1,437 in 2025/26 against the national average of £1,770, and was the lowest in the Tees Valley. Every 1% of Council Tax raises approximately £0.750m per year.
- 4.11 The regulations also require a council tax base to be calculated for parishes, and similar calculations have been made for the parishes of Nunthorpe (Appendix 2) and Stainton & Thornton (Appendix 3). The council tax bases for 2026/27 are **2,408.72** and **1,530.35** respectively, rounded to two decimal places.
- 4.12 The billing authority must notify the major precepting authorities (Cleveland Police and Crime Commissioner and Cleveland Fire Authority) of its council tax base by 31st January 2026.

5. Ward Member Engagement if relevant and appropriate

- 5.1 Not applicable to this report.

6. Other potential alternative(s) and why these have not been recommended

- 6.1 The Council has no option but to calculate a council tax base each year as it is a statutory requirement. The basis of calculation is prescribed by the legislation, apart from the estimated collection rate for 2026/27 which is applied to calculate the council tax base for 2026/27 for which alternative rates could have been used in the calculation. The estimated collection rate for 2026/27 that has been used is the estimate of the percentage of the 2026/27 Council Tax which will be collected in total based on the latest information available regarding collection rates. Note that this is not the expected in-year collection rate in 2026/27.

7. Impact(s) of the recommended decision(s)

Topic	Impact
Financial (including procurement and Social Value)	The council tax base for 2026/27 for the whole of Middlesbrough (detailed in Appendix 1) is 37,062.20 rounded to two decimal places. The growth in the council tax base is estimated to have reduced the need for budget reductions and provided funding for investment in service budget growth in line with the Mayor's priorities of approximately £1.138m in 2026/27 and on an ongoing basis, based on the 2025/26 Basic Council Tax. The net increase in the council tax base from 2025/26 is 548.30 (1.5%) band D equivalent properties, assuming the collection rate of 98.3% for 2026/27. There are no procurement impacts arising from this report. The proposed recommendations in this report do not directly impact on Social Value.
Legal	It is a statutory requirement under the Local Government Finance Act 1992 for billing authorities to calculate a council tax base. Section 84 Local Government Finance Act 2003 amends section 67 of the Local Government Finance Act 1992 so that a full Council meeting is no longer required to adopt the council tax base.
Risk	The calculation of the council tax base is a part of the Council's budget strategy which forms part of the Council's Policy Framework. The report ensures that the Council meets its statutory duty to calculate a council tax base for each financial year.
Human Rights, Public Sector Equality Duty and Community Cohesion	The proposed recommendations in this report do not directly impact on Human Rights, Public Sector Equality Duty and Community Cohesion
Reducing Poverty	The proposed recommendations in this report do not directly impact on Reducing Poverty.
Climate Change / Environmental	The proposed recommendations in this report do not directly impact on Climate Change/Environmental issues.

Children and Young People Cared for by the Authority and Care Leavers	The proposed recommendations in this report do not directly impact on Children and Young People Cared for by the Authority and Care Leavers.
Data Protection	The proposed recommendations in this report do not directly impact on Data Protection issues.

Actions to be taken to implement the recommended decision(s)

Action	Responsible Officer	Deadline
Following expected approval, the Police and Crime Commissioner, the Cleveland Fire Authority, and the Parish Councils will be notified of the 2026/27 council tax base by the statutory deadline of 31 January 2026.	Director of Finance and Transformation (s151 Officer)	31 January 2026

Appendices

1	Calculation of the 2026/27 Council Tax Base for Middlesbrough area (including parishes)
2	Calculation of the 2026/27 Council Tax Base for Nunthorpe Parish Council
3	Calculation of the 2026/27 Council Tax Base for Stainton & Thornton Parish Council

Background papers

None

Contact: Andrew Humble

Director of Finance and Transformation (s151 Officer)

Email: andrew_humble@middlesbrough.gov.uk

**CALCULATION OF THE 2026/27 COUNCIL TAX BASE FOR MIDDLESBROUGH AREA
(INCLUDING PARISHES)**

	COUNCIL TAX BAND									
	A (with disabled relief reduction)	A	B	C	D	E	F	G	H	
		£0-£40,000	£40,001-£52,000	£52,001-£68,000	£68,001-£88,000	£88,001-£120,000	£120,001-£160,000	£160,001-£320,000	£320,001 and over	TOTAL
Total number of dwellings on the Valuation List		33,076	11,578	11,644	5,654	2,840	1,046	605	54	66,497
Total number of dwellings after discounts, premiums, and local tax support	27.61	18,163.08	8,294.55	9,592.72	5,050.47	2,577.79	979.67	552.44	32.00	45,270.33
Ratio to band D	5/9	6/9	7/9	8/9	9/9	11/9	13/9	15/9	18/9	
Number of band D equivalents	15.34	12,108.72	6,451.32	8,526.86	5,050.47	3,150.63	1,415.08	920.73	64.00	37,703.15

Assumed collection rate of 98.3%

0.983

Council tax base for 2026/2027 (rounded to two decimal places)

37,062.20

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**CALCULATION OF 2026/27 COUNCIL TAX BASE FOR NUNTHORPE PARISH COUNCIL
(INCLUDED IN APPENDIX 1)**

	COUNCIL TAX BAND									
	A (with disabled relief reduction)	A	B	C	D	E	F	G	H	
		£0-£40,000	£40,001-£52,000	£52,001-£68,000	£68,001-£88,000	£88,001-£120,000	£120,001-£160,000	£160,001-£320,000	£320,001 and over	TOTAL
Total number of dwellings on the Valuation List		20	115	394	794	361	274	349	11	2,318
Total number of dwellings after discounts, premiums, and local tax support	0.00	10.41	86.03	352.63	710.06	329.10	259.76	333.35	10.00	2,091.34
Ratio to band D	5/9	6/9	7/9	8/9	9/9	11/9	13/9	15/9	18/9	
Number of band D equivalents	0.00	6.94	66.91	313.45	710.06	402.23	375.21	555.58	20.00	2,450.38

Assumed collection rate of 98.3%

0.983

Council tax base for 2026/2027 (rounded to two decimal places)

2,408.72

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APPENDIX 3

CALCULATION OF 2026/27 COUNCIL TAX BASE FOR STAINTON & THORNTON PARISH COUNCIL (INCLUDED IN APPENDIX 1)

	COUNCIL TAX BAND									
	A (with disabled relief reduction)	A	B	C	D	E	F	G	H	TOTAL
		£0-£40,000	£40,001-£52,000	£52,001-£68,000	£68,001-£88,000	£88,001-£120,000	£120,001-£160,000	£160,001-£320,000	£320,001 and over	
Total number of dwellings on the Valuation List		35	163	582	537	252	122	54	1	1,746
Total number of dwellings after discounts, premiums, and local tax support	0.00	19.23	119.24	490.59	489.94	230.84	115.57	44.50	1.00	1,510.91
Ratio to band D	5/9	6/9	7/9	8/9	9/9	11/9	13/9	15/9	18/9	
Number of band D equivalents	0.00	12.82	92.74	436.08	489.94	282.14	166.93	74.17	2.00	1,556.82

Assumed collection rate of 98.3%

0.983

Council tax base for 2026/2027 (rounded to two decimal places)

1,530.35

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MIDDLESBROUGH COUNCIL	
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Report of:	Andrew Humble - Director of Finance and Transformation (S151 Officer)
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Relevant Executive Member:	Cllr Nicky Walker - Executive Member for Finance
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Submitted to:	Executive
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Date:	3 December 2025
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Title:	Treasury Management – Mid Year Review 2025/26
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Report for:	Information
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Status:	Public
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Council Plan priority:	Delivering Best Value
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Key decision:	No
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Why:	Report is for information only
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Subject to call in?	No
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Why:	Report not for decision
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Proposed decision(s)
That the Executive : • NOTES the following in relation to the annual Treasury Management Strategy: - the mid-year Prudential Indicator results for 2025/26 as the Council's current position in relation to capital finance activities and overall indebtedness. - the performance of the treasury management function against the Council's approved strategy for the current financial year.

Executive summary
In accordance with the Local Government Act 2003 and the Chartered Institute of Public Finance and Accountancy (CIPFA) Codes of Practice on Capital Finance and Treasury Management, the Council is required to approve a Treasury Management Strategy and a set of Prudential Indicators on an annual basis. It is also required to undertake a mid-year review to understand how the Council is performing to date in this financial year.

This process self-regulates the level of capital financing activities and the long-term affordability and value for money achieved in delivering capital investment for the Council. The report also gives assurance on managing the short, medium and long-term borrowing and investment decisions of the Council in an effective manner. The Treasury Management Strategy is therefore a critical foundation of the Council's financial management and governance framework.

The report sets out the 2025/26 mid-year performance against the annual Treasury Management Strategy approved by Council and gives an analysis of the results achieved to date. The key points for Members to note on this are as follows:

Borrowing

- Treasury management activity has remained compliant with approved prudential management indicators during the first six months of 2025/26.
- The amount of borrowing required during the year is expected to be **£18.735m** compared to an approved budget of **£17.085m**. This is due to the approval of £1.600m in terms of a loan to Middlesbrough College, plus other movements in the capital programme over the first six months. The borrowing requirement over the two subsequent financial years however is in line with Council limits.
- The Council's underlying need to borrow, which reflects the total of all historical capital expenditure financed from borrowing, is called the Capital Financing Requirement (CFR) and is expected to be **£314.380m** on 31 March 2026.
- The Council does not borrow externally for the total amount of the CFR as it holds internal cash balances against which it borrows internally, as part of its Treasury Management Strategy. Total external debt was **£254.605m** on 30/9/25 and is expected to rise by a further £30m to **£284.605m** by the end of the financial year.
- The Council is therefore expected to be 'under borrowed' by **£29.775m or 9.5%** at the financial year end. This is good practice to avoid unnecessary revenue costs and to ensure effective cashflow management.

Investments

- All cash investments have been made in line with the Council's credit worthiness criteria, generally with either central government or other local authorities.
- Interest earned on these cash investments is expected to generate in the region of **£0.900m** for 2025/26 and this will reduce the net cost of capital financing.

Affordability

- The net annual revenue cost of financing the Council's current and historic debt, less income from its commercial investments and on its cash balances is **£12.205m or 8.5%** of the net revenue budget for the financial year. This reflects the cost of loan principal repayments (Minimum Revenue Provision - MRP) and interest on external borrowing.

- The affordability limit advised by the s151 Officer is for revenue costs of capital financing to be contained within **10% of the net revenue budget**, unless specific advice is given to Members as part of the budget setting process.
- The long-term forecast shows costs approaching 10% by the end of the decade. This will limit the availability of borrowing as a source of funding future capital investment and more reliance will be required on external funding and capital receipts and/ or projects for which investment will reduce operating costs or increase operating income of the Council.

1. Purpose of this report and its contribution to the achievement of the Council Plan ambitions

- 1.1 This report provides an important update to the Executive on performance in relation to the Council's borrowing, investments, and cash-flow for the 2025/26 financial year to meet the requirements of the CIPFA Treasury Management Code of Practice and the Local Government Act 2003. It should be read in conjunction with the Council's revenue and capital Quarter Two budget monitoring report for 2025/26, which is a separate report on this agenda, to understand the full financial position of the Council.
- 1.2 The report also provides the mid-year Prudential Indicators results for 2025/26 in accordance with the Chartered Institute of Public Finance and Accountancy (CIPFA) Code of Capital Finance, which is best practice in terms of governance in this area.

Our ambitions	Summary of how this report will support delivery of these ambitions and the underpinning aims
A successful and ambitious town	Treasury Management is a corporate discipline that underpins and supports the financial infrastructure of the Council. As a result, this report and the governance around capital financing and treasury management arrangements indirectly contributes to all areas and ambitions within the Council Plan.
A healthy Place	
Safe and resilient communities	
Delivering best value	The cost of capital financing and cashflow management for the Council is more than £12m per annum. This is one of the largest operating budgets managed by the Council and pays for more than £300m of historic capital investment. All decisions on borrowing and investments need to operate within this budget and the parameters set by Full Council (the prudential indicators) in February 2025 to ensure that they are affordable and sustainable over the medium-term. Given the size of the transactions involved on borrowings and investments, it is important that these comply with the framework set out in the annual treasury management strategy. This allows risk to be managed in a prudent way, that appropriate governance measures are in place, and that best value can be achieved from these resources in the support of the Council Plan priorities.

2. Recommendations

2.1 That the Executive :

- **NOTES** the following in relation to the annual treasury management strategy:
 - the mid-year Prudential Indicator results for 2025/26 as the Council's current position in relation to capital finance activities and overall indebtedness.
 - the performance of the treasury management function against the Council's approved strategy for the current financial year.

3. Rationale for the recommended decision(s)

3.1 The recommendations above will fulfil the following for the local authority:

- Compliance with the CIPFA Prudential Code for Capital Finance for local authorities.
- Compliance with the CIPFA Treasury Management Code for local authorities.
- Compliance with the Local Government Act 2003 Section 1 in relation to borrowing.

4. Background and relevant information

4.1 The Council's Treasury Management Strategy for 2025/26 (including prudential indicators) was approved at the annual budget setting meeting on 19 February 2025. The Authority both borrows and invests substantial sums of money to provide liquidity for its revenue and capital plans, and is therefore exposed to various financial risks, including the potential loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of risk remains central to the treasury management strategy each year.

4.2 The Council is a net borrower overall. The borrowing required to fund its capital programme is significantly higher than its normal cash balances that are available for operational purposes and investments. As a result, the timing of capital financing decisions has a significant impact on the overall treasury strategy within the Council, the total cost involved, and how risk is managed on day-to-day activities.

4.3 The structure of this report to assess performance against the 2025/26 approved treasury strategy for the financial year to date is as follows:

- Capital expenditure and financing for the financial year.
- The Council's overall borrowing need.
- Prudential indicators and any compliance issues.
- The treasury position on 30 September 2025.
- The economic background for the 2025/26 financial year so far.
- A summary of the Treasury Management Strategy approved for the financial year.
- Treasury Management activity and compliance to date.

Capital Expenditure and Financing 2025/26

4.4 The Council undertakes capital expenditure on long term assets, which can be financed as follows:

- immediately during the year of incurring the expenditure, through capital receipts, capital grants, contributions, or from the revenue budget.
- if insufficient immediate capital resources are available, prudential borrowing can be used to spread these costs over future financial years.

4.5 Part of the Council's treasury activities is to address this borrowing need, either through borrowing from external bodies – predominantly the Public Works Loan Board (PWLb), other banks and financial institutions, or by utilising temporary cash resources within the Council (internal borrowing). The wider treasury activities also include managing the day-to-day cash flow position, its previous borrowing activities, and the investment of surplus funds from cash balances that are not required immediately. These activities are structured to manage risk foremost and then optimise performance where appropriate.

4.6 Capital Expenditure forms one of the prudential indicators that are used to regulate treasury activity. Table 1 shows total forecast capital expenditure for the year and how this is expected to be financed. Further information on the capital variances at directorate level from the original budget and what impact this has had on the overall financing of the programme can be found in the 2025/26 Quarter Two revenue and capital budget monitoring report.

Table 1: Capital expenditure and financing: 2024-25 FY to 2027-28 FY

	2024/25 actual (£m)	2025/26 original budget (£m)	2025/26 forecast outturn (£m)	2025/26 variance (£m)	2026/27 original budget (£m)	2026/27 revised budget (£m)	2026/27 variance (£m)	2027/28 original budget (£m)	2027/28 revised budget (£m)	2027/28 variance (£m)
Prudential Borrowing	12.343	17.085	18.735	1.650	28.180	21.687	(6.493)	-	3.074	3.074
Capital Receipts	6.000	6.000	6.000	-	6.000	6.000	-	11.613	12.560	0.947
EFS Receipts	2.443	-	-	-	-	-	-	-	-	-
Flexible Use of Capital Receipts	4.447	7.500	6.132	(1.368)	6.750	10.827	4.077	6.250	5.294	(0.956)
Grants	31.693	43.230	35.339	(7.891)	15.558	33.059	17.501	-	-	-
Contributions	0.237	0.983	0.938	(0.045)	6.520	7.312	0.792	-	4.112	4.112
TOTAL	57.163	74.798	67.144	(7.654)	63.008	78.885	15.877	17.863	25.040	7.177

The Council's overall borrowing requirement

- 4.7 The Council's underlying need to borrow is called the Capital Financing Requirement (CFR). This results from the historic capital activity of the Council and the resources used to pay for the capital expenditure over time. It represents 2025/26 and prior years' net capital expenditure which has not yet been paid for from revenue, capital receipts, or other external resources, and therefore must be met from borrowing.
- 4.8 The CFR will normally be a combination of external borrowing (from third parties in the form of loan arrangements) or from internal borrowing (from the council's own unapplied revenue and capital resources). External borrowing incurs both principal and interest costs as part of the Council's capital financing budget. Internal borrowing is from the Council's own cash resources and has an opportunity cost in that the cash is spent on capital activities, rather than being invested to earn interest.
- 4.9 Part of the Council's treasury role is to meet the funding requirements for this borrowing need. Depending on the funding requirements of the capital programme, the treasury team organises the Council's position to ensure that sufficient cash is available to meet the capital plans and general liquidity requirements. This may be sourced through borrowing from external bodies (such as the government, through the PWLB, or the money markets).
- 4.10 The Council's underlying borrowing need (CFR) is not allowed to rise indefinitely. Statutory guidance is in place to ensure that capital expenditure is broadly charged to revenue over the life of the asset. The Council is required to make an annual revenue charge, called Minimum Revenue Provision (MRP), to reduce the CFR. This is effectively a principal loan repayment of the long-term borrowing need from the revenue budget.
- 4.11 The Council's capital financing requirement for the next three financial years is shown in Table 2 and represent a key prudential indicator for the Council. The CFR position at the mid-year position for 2025/26 is expected to be £314.380m which is £4.183m higher than forecast at the start of the financial year. This is due to £1.650m additional prudential borrowing from when the budget was set, plus £2.533m of technical adjustments to the CFR amount as part of the closure of the 2024/25 financial statements.

Table 2: expected change in the Capital Financing Requirement 2025/26 to 2027/28 FY

	2025/26 (£m)	2026/27 (£m)	2027/28 (£m)
Opening CFR at 1 April	300.041	314.380	331.312
Add: Capital expenditure financed by borrowing	18.735	21.687	3.074
Less: Minimum Revenue Provision	(4.396)	(4.755)	(5.137)
Forecast closing CFR at 31 March	314.380	331.312	329.249
Approved CFR 2025/26 – budget setting	310.197	333.295	327.929
Variance on CFR since budget set	4.183	(1.983)	1.320

Mid-year Treasury Position for 2025/26

4.12 Whilst the measure of the Council's underlying need to borrow is the CFR, the Director of Finance and Transformation can manage the Council's actual borrowing position by:

- borrowing to the CFR level; or
- choosing to utilise some temporary cash flows instead of borrowing ("under borrowing").

4.13 Most local authorities have a degree of under borrowing within their CFR at present. This tends to be in the range of 10% - 20% of the total CFR. This means that external debt is lower than the need to borrow and other resources available have been used to bridge the gap. This strategy has been common as part of a Treasury Management approach to generating revenue savings in relation to annual capital financing costs, by deferring external borrowing, to a later point in time driven by cash flow/liquidity needs of the organisation. It also mitigates the Council's risk exposure on investments with external counterparties.

4.14 The Council's treasury management debt and investment position is organised by the corporate finance service to ensure adequate liquidity for revenue and capital spending needs, security for investments, and to manage risks within all treasury management activities. Procedures and controls to achieve these objectives are well established both through member reporting and through officer activity detailed in the Council's Treasury Management Practices. These practice statements are available for officers, members, auditors, regulators, and members of the public to review if required.

4.15 A summary of outstanding balances is shown below.

Table 3 – summary of borrowing and investments and movement since 2024/25-year end position

<i>Treasury Position</i>	2024/25 Outturn Principal (£m)	Average Rate (%)	2025/26 mid-year Principal (£m)	Average Rate (%)
Public Works Loan Board	225.604	3.76	225.069	3.79
LOBO loans	13.000	6.83	13.000	6.83
Other loans	14.838	3.82	16.536	3.85
Total Debt	253.442		254.605	
Cash Investments	(21.555)	4.45	(22.245)	4.17
Net Debt	231.887		232.360	

- 4.16 Almost 90% of the Council's total debt is with central government via the PWLB on 30 September 2025. These loans vary in length from between 5 – 45 years and in essence, these match the lives of the capital assets they are financing. Most of the Lender Option Borrower Option (LOBO) and other debt was taken out by the Council in the early 2000's when interest rates were higher, but these options were more attractive than borrowing from central government at the time. Due to the terms and conditions on these loans, there is no option to refinance them in the short term and switch to PWLB loans at lower rates of interest.
- 4.17 Cash investments are temporary surpluses in liquidity that are either invested with central government (via the debt management office) or with other local authorities with a cash need to borrow. Over £0.900m in interest is forecast to be earned during 2025/26 on these balances at an average rate of around 4.0%.
- 4.18 The Council's total debt outstanding as on 30 September 2025 was £254.605m. The Council's revised CFR position is estimated to be £314.380m at Quarter Two. This means that the Council was "under borrowed by £59.775m or 19.1%. Most borrowing to date has therefore been to replace maturing short-term debt and most of the capital programme borrowing for the financial year still needs to be taken.
- 4.19 This "under borrowed" amount is currently financed by internal borrowing from cash balances (usable reserves) which means that the amount that could have been invested externally was reduced to cover this. The reduced under borrowed position has the dual effect of reducing revenue costs incurred by the General Fund budget because borrowing costs are generally greater than investment returns. It also reduces counterparty risk by reducing our exposure to the inherent risks that exist in commercial banks and other financial institutions.
- 4.20 Gross Borrowing and the CFR – in order to ensure that borrowing levels are prudent over the medium term and only for a capital purpose, the Council should ensure that its gross external borrowing does not, except in the short term, exceed the total of the capital financing requirement in the preceding year (2024/25) plus the estimates of any additional capital financing requirement for the current (2025/26) and next two financial years (2026/27 & 2027/28). This essentially means that the Council is not borrowing to support revenue expenditure and allows the Council some flexibility to borrow in advance of its immediate capital needs in 2025/26, if required.
- 4.21 Table 4 sets out the Council's gross borrowing position against the CFR and shows **compliance with this prudential indicator** as debt levels continue to be lower than required over the medium term.

Table 4 – Gross Borrowing to Capital Financing Requirement comparison in millions

	2024/25 Actual	2025/26 Original	2025/26 Mid-year	2026/27 Forecast	2027/28 Forecast
Gross External Borrowing	253.442	292.388	284.605	316.785	319.859
Capital Financing Requirement	300.041	310.197	314.380	331.312	329.249
(Under)/Over borrowing	(46.599)	(17.809)	(29.775)	(14.527)	(9.390)
% of CFR	15.5	5.7	9.5	4.4	2.9

4.22 **The Authorised Limit** – The Authorised Limit is the “Affordable Borrowing Limit” required by section 3 of the Local Government Act 2003. The Council does not have power to borrow above this level.

4.23 **The Operational Boundary** – The Operational Boundary is the expected borrowing position of the Council during the year. Periods where the actual position is either below or over the Boundary are both acceptable, subject to the Authorised Limit not being breached.

4.24 **Actual financing costs as a proportion of net revenue expenditure** - This identifies the trend in the revenue cost of capital (borrowing and other long term obligation costs net of investment income) as a proportion of the Council’s net revenue budget. The actual for this indicator has risen from the previous year due to an increase in the Financing costs outturn.

Table 5 – Key Prudential indicators in millions

	2024/25 actual	2025/26 mid-year	2026/27 forecast	2027/28 forecast
Authorised Limit (£m)	328.000	331.000	354.000	348.000
Operational Boundary (£m)	318.000	321.000	344.000	338.000
Capital Financing Requirement (£m)	300.041	314.380	331.312	329.249
Financing costs (£m)	11.405	12.205	13.732	14.226
Net Revenue Budget (£m)	143.190	143.304	144.382	148.621
Proportion of net revenue budget (%)	7.8%	8.5%	9.5%	9.6%

*Forecasts for 2026/27 & 2027/28 net revenue budgets subject to future change

- 4.25 The table above also shows the profile of debt required to fund the capital programme over the whole of the medium-term financial planning period, and that this will rise to a maximum of £331.312m on 31st March 2027. This increase in indebtedness is a direct result of the amount required to fund the capital programme in each financial year and any additional cash flow demands, due to the use of reserves and debt refinancing.
- 4.26 Although the Council does not have relatively highly debt levels against its comparator authorities, the strain on the revenue budget is increasing, particularly against the 2025/26 and 2026/27 budgets. When CIPFA introduced the Capital Finance Code of Practice in 2007, a nominal amount of 10% of the net revenue budget was suggested as being a maximum threshold for sustainability and prudence. Although some councils have exceeded this over the years the S151 Officer's advice is to contain capital expenditure financed by borrowing at a level which remains below this benchmark. This is particularly important given the Council's overall financial position and the low level of unrestricted revenue reserves.
- 4.27 The levels though do remain aligned to the operational boundary (the Council's capital planning total) and are within the authorised limit approved by Members, which is the statutory limit for the Council in relation to external debt.

Economic Background 2025/26

- 4.28 A summary of the general economic conditions that have prevailed through the first six months of the 2025/26 financial year is attached at Appendix 1 for information. This has been provided by the Council's external treasury adviser and gives some context on the current economic drivers that are influencing interest and bond rates at present.

Summary of the Treasury Management Strategy agreed for 2025/26.

- 4.29 Treasury Management is defined as 'the management of the Council's cash flows, borrowing and investments, and the associated risk'. The main risks that affect a local authority include credit risk, interest rate risk, liquidity risk and refinancing risk.
- 4.30 The borrowing approach outlined in the treasury strategy was to achieve the optimum value for money for the revenue budget by a combination of long-term borrowing from the Public Works Loan Board when interest rates reached a trigger rate of below 4.75% and the maturity term of the new borrowing fitted in with the Council's current debt portfolio. If these conditions did not exist when cash balances fell below £10.000m, then short term borrowing would be considered for the minimum period possible, given that interest rates were expected to rise over the period. Additionally short-term borrowing would be capped at a maximum of 20% of the total of the Council's gross external debt balance.
- 4.31 The approach to investing cash balances is to follow the relevant government and CIPFA guidance in prioritising and protecting the principal sums involved by only investing with institutions on the Council's approved lending list. This factor is paramount and more important than the fact that higher interest rates that could be achieved on riskier and illiquid investments with longer duration terms. Only 10% of total investments

could be deposited for periods over one financial year given the higher levels of risk associated with these products.

Treasury Management activity during 2025/26

- 4.32 During the financial year so far, the Council has maintained an under-borrowed position. This means that the capital borrowing need, (the CFR), was not fully funded with loan debt. Internal cash balances underpinning the Council's reserves, balances and cash flow was used as an interim measure. This strategy was prudent as investment returns were low and minimising counterparty risk on placing investments needed to be considered.
- 4.33 All borrowing and investment activity undertaken so far during the financial year has been in line with the approved strategy agreed, with no exceptions.
- 4.34 A total of £10.000m of new long-term borrowing was undertaken from the PWLB, with £8.837m repaid on either maturity or annuity loans. The total level of external debt for the Council rose by £1.163m during the first six months of 2025/26. Significant borrowing (circa £30m) is still required to fund the capital programme and other liquidity requirements over the remainder of the financial year. Any borrowing decisions will be undertaken in line with the Council's approved treasury management policy and via consultation with external advisers. All the costs of the above debt decisions have been factored into the medium-term financial plan and are fully funded.
- 4.35 Investments were made with either central government or other local authorities on an almost daily basis to ensure that the Council's overall liquidity position was protected. All principal sums invested have been repaid on time by each counterparty. The total interest earned on these temporary cash balances for 2025/26 is expected to be £0.900m and helps to balance the overall net capital financing budget of £12.205m.
- 4.36 The Council's Treasury Management function has complied with all the relevant statutory and regulatory requirements to date during 2025/26, which limit the levels of risk associated with its treasury management activities. The adoption and implementation of both the Prudential Code and the code of Practice for Treasury Management means both that its capital expenditure is prudent, financially affordable, and sustainable, and its treasury practices demonstrate a low-risk approach.
- 4.37 Officers of the Council are aware of the risks of passive management of the treasury portfolio and, with the support of Arlingclose, the Council's advisers, have proactively managed the debt and investments so far over the financial year.

5. Ward Member Engagement if relevant and appropriate

- 5.1 Not relevant to this report as it relates to corporate financial management and governance issues.

6. Other potential alternative(s) and why these have not been recommended

- 6.1 Not relevant as the report is for information only.

7. Impact(s) of the recommended decision(s)

Topic	Impact
Financial (including procurement and Social Value)	All relevant financial implications are outlined within the body of this report and the supporting Appendix 1. The capital programme and financing being recommended in the budget report continues to remain affordable within the approved MTFP and revenue budget parameters. However, the Council needs to manage and prioritise its future capital investment and associated funding strategies more strictly over the term of the MTFP to maintain the revenue cost of capital investment within affordable and prudent parameters. The prudential and treasury management indicators and processes remain robust and within prudent limits over the term of the MTFP. Tables 3-5 outlines the key debt metrics, and the capital financing costs as a % of the net revenue budget over the medium-term financial planning period.
Legal	There are no direct legal implications of this report. All activity on capital financing, investments and borrowing is under current local authority powers, under either the local government act 2003 or the capital finance and accounting regulations.
Risk	Any risk related issues are set out within the report. Risk management is an integral part of the Council's treasury management strategy, and these are considered as part of business-as-usual activities and are set out in more detail within the Treasury Management Practices document maintained by the corporate finance team.
Human Rights, Public Sector Equality Duty and Community Cohesion	There are no applicable issues to consider within this report.
Reducing Poverty	There are no applicable issues to consider within this report.
Climate Change / Environmental	There are no applicable issues to consider within this report.
Children and Young People Cared for by the Authority and Care Leavers	There are no applicable issues to consider within this report.
Data Protection	There are no applicable issues to consider within this report.

Actions to be taken to implement the recommended decision(s)

Action	Responsible Officer	Deadline
Not Applicable		

Appendices

1	Economic Background – 2025/26 financial year – first six months
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Background papers

Body	Report title	Date
Council	Prudential Indicators and Treasury Management Strategy Report – 2025/26	19 February 2025

Contact: Justin Weston, Head of Corporate Finance (Deputy S151 Officer)
Email: justin_weston@middlesbrough.gov.uk

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Appendix 1

Economic Background – 2025/26 Financial Year (first six months)

The first quarter was dominated by the fallout from the US trade tariffs and their impact on equity and bond markets. The second quarter, still rife with uncertainty, saw equity markets making gains and a divergence in US and UK government bond yields, which had been moving relatively closely together.

From late June, amid a UK backdrop of economic uncertainty, concerns around the government's fiscal position and speculation around the autumn Budget, yields on medium- and longer-term gilts pushed higher, including the 30-year which hit its highest level for almost 30 years.

UK headline annual consumer price inflation (CPI) increased over the period, rising from 2.6% in March to 3.8% in August, still well above the Bank of England's 2% target. Core inflation also rose, from 3.4% to 3.6% over the same period, albeit the August reading was down 0.2% from 3.8% the previous month. Services inflation also fell from July to August, to 4.7% from 5.0%.

The UK economy expanded by 0.7% in the first quarter of the calendar year and by 0.3% in the second quarter. In the final version of the Q2 2025 Gross Domestic Product (GDP) report, annual growth was revised upwards to 1.4% y/y. However, monthly figures showed zero growth in July, in line with expectations, indicating a sluggish start to Q3.

Labour market data continued to soften throughout the period, with the unemployment rate rising and earnings growth easing, but probably not to an extent that would make the more hawkish Monetary Policy Committee (MPC) members comfortable with further rate cuts. In addition, the employment rate rose while the economic inactivity rate and number of vacancies fell.

The Bank of England (BoE)'s MPC cut Bank Rate from 4.5% to 4.25% in May and to 4.0% in August after an unprecedented second round of voting. The final 5-4 vote was for a 25bps cut, with the minority wanting no change. In September, seven MPC members voted to hold rates while two preferred a 25bps cut. The Committee's views still differ on whether the upside risks from inflation expectations and wage setting outweigh downside risks from weaker demand and growth.

The August BoE Monetary Policy Report highlighted that after peaking in Q3 2025, inflation is projected to fall back to target by mid-2027, helped by increasing spare capacity in the economy and the ongoing effects from past tighter policy rates. GDP is expected to remain weak in the near-term, whilst over the medium-term outlook will be influenced by domestic and global developments.

Arlingclose, the Council's treasury management adviser, maintained its central view that Bank Rate would be cut further as the BoE focused on weak GDP growth more than higher inflation. One more cut is currently expected during 2025/26, taking Bank Rate to 3.75%. The risks to the forecast are balanced in the near-term but weighted to the downside further out as weak consumer sentiment and business confidence and

investment continue to constrain growth. There is also considerable uncertainty around the autumn Budget and the impact this will have on the outlook.

Against a backdrop of uncertain US trade policy and pressure from President Trump, the US Federal Reserve held interest rates steady for most of the period, before cutting the Fed Funds Rate to 4.00%-4.25% in September. Fed policymakers also published their new economic projections at the same time. These pointed to a 0.50% lower Fed Funds Rate by the end of 2025 and 0.25% lower in 2026, alongside GDP growth of 1.6% in 2025, inflation of 3%, and an unemployment rate of 4.5%.

The European Central Bank (ECB) cut rates in June, reducing its main refinancing rate from 2.25% to 2.0%, before keeping it on hold through to the end of the period. New ECB projections predicted inflation averaging 2.1% in 2025, before falling below target in 2026, alongside improving GDP growth, for which the risks are deemed more balanced and the disinflationary process over.

Financial markets: After the sharp declines seen early in the period, sentiment in financial markets improved, but risky assets have generally remained volatile. Early in the period bond yields fell, but ongoing uncertainty, particularly in the UK, has seen medium and longer yields rise with bond investors requiring an increasingly higher return against the perceived elevated risk of UK plc. Since the sell-off in April, equity markets have gained back the previous declines, with investors continuing to remain bullish in the face of ongoing uncertainty.

Over the period, the 10-year UK benchmark gilt yield started at 4.65% and ended at 4.70%. However, these six months saw significant volatility with the 10-year yield hitting a low of 4.45% and a high of 4.82%. It was a broadly similar picture for the 20-year gilt which started at 5.18% and ended at 5.39% with a low and high of 5.10% and 5.55% respectively. The Sterling Overnight Rate (SONIA) averaged 4.19% over the six months to 30th September.

Credit review: Arlingclose maintained its recommended maximum unsecured duration limit on most of the banks on its counterparty list at 6 months. The other banks, with higher risk factors, remain on 100 days.

After spiking in early April following the US trade tariff announcements, UK credit default swap (CDS) prices have since generally trended downwards and ended the period at levels broadly in line with those in the first quarter of the calendar year and throughout most of 2024.

Overall, at the end of the period CDS prices for all banks on Arlingclose's counterparty list remained within limits deemed satisfactory for maintaining credit advice at current durations.

Financial market volatility is expected to remain a feature, at least in the near term and, credit default swap levels will be monitored for signs of ongoing credit stress. As ever, the institutions and durations on the Council's counterparty list recommended by remain under constant review.

MIDDLESBROUGH COUNCIL	
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Report of:	Richard Horniman - Director of Regeneration
Relevant Executive Member:	Theo Furness - Executive Member for Development
Submitted to:	Executive
Date:	3 December 2025
Title:	Cemetery Provision – Middlesbrough
Report for:	Decision
Status:	Public
Council Plan priority:	Safe and resilient communities
Key decision:	Yes
Why:	Decision(s) will incur expenditure or savings above £250,000 and have a significant impact in two or more wards
Subject to call in?	Yes
Why:	Non-Urgent Report

Proposed decision(s)
It is recommended that Executive: a) APPROVES a virement of £0.277m from the Derisking Sites scheme to fund the additional costs for the main works as part of the Thorntree extension. If approved, the virement will be actioned as part of the Revenue & Capital Budget Forecast Year End Outturn Quarter 3 2025-26 Executive report. b) ENDORSES the proposals for short, medium and long-term burial provision c) NOTES the current status of burial plots remaining in Thorntree and Acklam Cemetery.

Executive summary
Middlesbrough Council has provided public cemeteries for over a century. Many of the historic cemeteries have now reached capacity. Currently, Thorntree and Acklam cemeteries provide for the majority of burials; however, these will reach capacity in approximately six - nine months¹, based on current demand and availability. The overriding objective is to ensure a seamless supply of burial provision in the town, the Council constantly monitors availability and demand.

¹ As of end of October 2025

This report seeks to update the Executive on the short, medium and long-term proposals to ensure that a seamless supply of cemetery provision is maintained in the town. Whilst overall, in terms of annual funeral provision breakdown, Middlesbrough's figures illustrate the breakdown of annual deaths as 87% of people being cremated with 13% of people choosing to be buried², therefore there are sufficient grounds to demonstrate a need for ongoing burial provision.

Providing new land for burials requires the strict observance of planning and environmental legislation. Therefore, the Council engaged specialists to complete a comprehensive option appraisal that will provide full project delivery and cost advice for options for Thorntree and Acklam Cemetery, from inception to the completion of all ground works. This complex work is to be inclusive of all site investigation surveys, analysis and preparation for all necessary statutory consents. These include planning permission and consent from the Environment Agency (EA) for burials, where required. A team of specialists, Gleeds and Cemetery Development and Environmental Solutions (CDS) were procured to undertake option analysis and provide design solutions for Thorntree, including some initial feasibility at Acklam. This work has now concluded at Thorntree, having been inclusive of site investigation surveys, ground analysis, and preparation for the required statutory consents. The Council is now at the stage, subject to Executive approval, where the necessary procurement, planning and other legal processes can take place to allow work to start on the extension at Thorntree, to ensure a seamless provision in the short term. A capital allocation for the main works of £2.388m was approved by the Executive as part of a wider capital report (*Capital Budget Report, 19th February 2025*) however there is now a shortfall, given the advanced detailed analysis and design development, which is now requested within this report. This report provides the outcome of the detailed analysis, leading to the proposed immediate proposals for Thorntree, along with additional actions to continue feasibility in the determination of additional space.

In order to deliver the short-term proposal, the report seeks a virement of £0.277m from the Derisking Sites scheme to prepare land for the delivery of 1258 burial plots in the short-term. In addition, the report outlines further steps to ensure the Council can secure a medium- and longer-term burial provision in the town

1. Purpose of this report and its contribution to the achievement of the Council Plan ambitions

- 1.1 This report seeks to update and inform Executive on the current and future burial plot supply, and actions proposed to tackle the limited supply and to ensure an ongoing provision. This request includes a virement of £0.277m from the De-Risking Sites Scheme to the existing cemetery capital budget.
- 1.2 In particular, the Executive are asked to approve the short, medium and longer-term proposals, to ensure a sustainable burial provision for residents in Middlesbrough. Alongside this, approval for the study at Acklam Crematorium will ensure a viable future for the cremation service offered in Middlesbrough.

² Figures as of June 2025 – as provided by Bereavement Services

Our ambitions	Summary of how this report will support delivery of these ambitions and the underpinning aims
A successful and ambitious town	
A healthy Place	
Safe and resilient communities	Provision of good quality and accessible burial space for those who require it, for both religious and non-religious purposes, is something which residents of the town would continue to need. Burial space within Middlesbrough would ensure families continue being able to bury and visit their loved ones, as and when they wish to, in sustainable and accessible locations.
Delivering best value	

2. Recommendations

2.1 It is recommended that Executive:

- a) **APPROVES** a virement of £0.277m from the Derisking Sites scheme to fund the additional costs for the main works as part of the Thorntree extension. If approved, the virement will be actions as part of the Revenue & Capital Budget Forecast Year End Outturn Quarter 3 2025-26 Executive report.
- b) **ENDORSES** the proposals for short, medium and long-term burial provision.
- c) **NOTES** the current status of burial plots remaining in Thorntree and Acklam Cemetery.

3. Rationale for the recommended decision(s)

- 3.1 Burial provision in the town is extremely limited, with estimated supply remaining of around six-nine months only. Whilst it is accepted that the Council does not have a statutory duty to provide burial space, it is anticipated that the Council seek to continue to provide provision for those who wish to utilise the service.
- 3.2 Failure to provide burial provision would mean residents would have no alternative but to find provision in neighbouring authorities.

4. Background and relevant information

Short Term proposal to increase capacity

- 4.1 Thorntree is a multi-faith burial site, with dedicated burial spaces for Muslim and non-Muslim faiths. Currently (see Appendix 1) non-Muslim burials are taking place in/around Site D, with Muslim burials to the north of the site, adjacent to Site A.
- 4.2 Following analysis of the site, it is proposed that Sites A, B, and D be progressed and developed for new burial provision, with Site C proposed as an area to include new parking provision and a secure site compound for the service area, which currently they do not have. The contracted works are inclusive of all groundworks, including new drainage, footpaths, signage, roads, incoming water supply for servicing of the graves and associated soft landscaping, with some new fencing to new areas.

4.3 Sites A, C and D do not require any planning consent, the only site which requires consent is B (former play park provision). It is worth noting, the Thorntree proposed extension is identified in the Local Plan, and pre-application consultation has been undertaken which was positive. All areas will require Environment Agency statutory permission (Certificate of Lawfulness) which will be obtained alongside the planning application submission. Subject to planning, the expansion of the proposed cemetery areas will unlock between a five-six year supply (based on figures from 2024 annual burial requirement).

4.4 The table below illustrates the split (across the sites) of how many spaces are estimated in each section:

Table 1- Proposed Plots at Thorntree Extension

Site	No of Plots	Comments
A	478	Adjacent to current Muslim burials – proposed to be a combination of Muslim/non-Muslim provision (subject to demand)
B	452	Site which requires planning permission
D	328	Area where current non-Muslim burials take place
C	0	This area whilst not immediately suitable for burial – does provide a secure site compound/additional parking/associated uses for service area
Total	1258*	*Based on 2024 burial figure of 224 burials equates to an estimated 5.6 year supply (NB – average number only)

4.5 The proposed timeline for works:

November 2025 (as part of existing funding)

- i) complete detailed drainage assessment
- ii) submit planning application for Site B (13-week determination period)
- iii) application submitted for Certificate of Lawfulness
- iv) commission of consultants to undertake study at Acklam Crematorium

December 2025/January 2026

- i) procurement dialogue with contractor leading to appointment
- ii) agreed detailed site programme for delivery of works
- iii) finalise detailed costs
- iv) works contract agreed

February/March 2026

- i) preparatory works for start on site
- ii) Certificate of Lawfulness obtained
- iii) planning permission for B approved (subject to no objections)

September 2026 works completed – estimated 16-week construction period*

**estimated – subject to confirmation by contractors*

Medium Term proposal to increase capacity

- 4.6 Acklam Cemetery has 95³ plots remaining (inclusive of Muslim and non-Muslim), which equates to around six months of supply. Following assessment of the land surrounding (and some green spaces within the boundary) the consultants have been tasked with assessing, what, if any, areas could be expanded both within and adjacent to the existing cemetery. This has identified areas for further investigation (see Appendix 2 – Areas C, D and F).
- 4.7 Additionally, there is a site identified in the emerging Local Plan⁴ - Land to the east of St Mary's Church, Church Lane, Nunthorpe (see Appendix 2). This is subject to adoption of the Plan, as well as further design and feasibility. Early survey assessments (carried out in 2023) demonstrate this is likely to be suitable for burial provision, subject to usual caveats. No capital is allocated for further survey work, nor infrastructure or groundworks to provide burial provision. If this site is unlocked, this could unlock up to a further 750-1000 plots.
- 4.8 The sites are all subject to planning constraints, site investigation and compliance with further statutory guidance for burial provision. This feasibility work will assess suitability of site, undertake some desktop analysis and limited desktop site investigation which may, or may not realise additional space. Surveys are constrained by the limited budget available for feasibility, at this stage. There is no capital allocated for creation of any plots (if any of the areas are suitable) and therefore this would be subject to further capital requests being approved.

Longer Term proposal to increase capacity

- 4.9 Feasibility work at Acklam, may or may not unlock further provision which adds further pressure to secure additional sites for medium-long term burial provision. Therefore, it is proposed that further work is undertaken to assess future cemetery sites within the town boundary. As expected, unallocated land (which is not earmarked for development) is limited within the Council's ownership boundary, however there are some sites which may have some potential to develop, but require further desktop analysis, in the first instance.
- 4.10 It is proposed that all these sites are assessed, and the outcome be brought back to the Executive, should any of the sites be viable with a detailed breakdown and of potential plot provision and capital cost requirement.

5. Ward Member Engagement if relevant and appropriate

- 5.1 Thorntree Members have been consulted and are comfortable with the proposals. Members are keen to see additional spaces unlocked as soon as possible and support proposed feasibility for both Acklam, and new sites analysis. Acklam Members have also been consulted and updated. As part of longer-term plans to increase capacity, ward members will be engaged as those areas emerge as options.

³ As of 13th October 2025 – changes daily/weekly

⁴ Publication Local Plan, March 2025 (submitted for Examination, Sep 2025)

6. Other potential alternative(s) and why these have not been recommended:

- 6.1 The Council could elect to not provide future burial space, but this has been rejected on the basis that significant proportions of the community continue to opt for burials.

7. Impact(s) of the recommended decision(s)

Topic	Impact
Financial (including procurement and Social Value)	The financial implications of the recommended decision have been assessed in the context of the Council's Medium Term Financial Plan (MTFP). As the additional £0.277m funding required is proposed to be provided through a virement for the Derisking Sites scheme there is no impact upon the Capital Programme nor the Capital Financing revenue budget. A VAT assessment has been undertaken, and the proposal is considered to be standard rated. There are no implications for the Council's partial exemption position, and advice has been sought from the VAT team where appropriate. Procurement requirements have been reviewed in line with the Council's Contract Procedure Rules. The proposed procurement route is an exemption due to limited timescales and contractor expertise, and the Procurement Team has been consulted to ensure compliance. Where applicable, the procurement process will incorporate social value considerations, including local employment, sustainability, community benefit, in line with the Council's Social Value Policy.
Legal	The Local Government Act 1972 provides that Local Authorities (as burial authorities) may provide and maintain cemeteries whether in or outside their area. This also extends to burial purposes under the Cremation Acts of 1902 and 1952. The Local Authorities' Cemeteries Order 1977 further provides that a burial authority may enclose, lay out and embellish a cemetery in such manner as they think fit, and from time to time improve it, and shall keep the cemetery in good order and repair, together with all buildings, walls and fences thereon and other buildings provided for use therewith. The Council should be mindful of our legal title and consider all relevant due diligence and desktop searches to establish whether the new land to be used is affected by any rights or easements (e.g. water mains/gas pipes etc.) which may be interrupted by these proposals (both in respect of short term and longer-term solutions). The Council should also be mindful of the planning and environmental risks highlighted above relating to the Acklam proposal and the potential liabilities that may arise therefrom. All contracts will need to comply with internal Contract Procedure Rules, procurement rules, and any requirements of

	the Funding Agreements, including passing down any relevant responsibilities to contractors.
Risk	The proposed recommendations are key to and consistent with supporting delivery of the Council's strategic priorities and risks, as set out in the Council Plan. Failure to approve proposed option and actions would inevitably lead to the Council not being able to offer burial plots in the town.
Human Rights, Public Sector Equality Duty and Community Cohesion	There are no disproportionate adverse impacts on any group or individuals with characteristics protected in UK equity law. An impact assessment has been carried out and is attached – see Appendix 3. It found that the proposal will support the Council to continue to meet the needs of individuals and groups. It was particularly relevant to those groups that require burials in relation to their religious beliefs
Reducing Poverty	This action has no direct contribution to measures which reduce poverty for residents in Middlesbrough.
Climate Change / Environmental	There are no disproportionate adverse impacts on the aspirations of the Council to achieve net zero, net carbon neutral or be the lead authority on environmental issues – see Appendix 3
Children and Young People Cared for by the Authority and Care Leavers	This action has no additional impact upon Children and Young People Cared for by the Authority and Care Leavers.
Data Protection	There are no Data Protection issues of consequence for this proposal.

Actions to be taken to implement the recommended decision(s)

Action	Responsible Officer	Deadline
To deliver infrastructure to create c1258 new burial plots in Thorntree Cemetery	Nasreen Younis	September 2026
Undertake feasibility desktop study for new cemetery provision	Nasreen Younis	April 2026

Appendices

1	Block Plan of Thorntree Proposals
2	Acklam and Nunthorpe – Sites for Investigation
3	Impact Assessment

Background papers

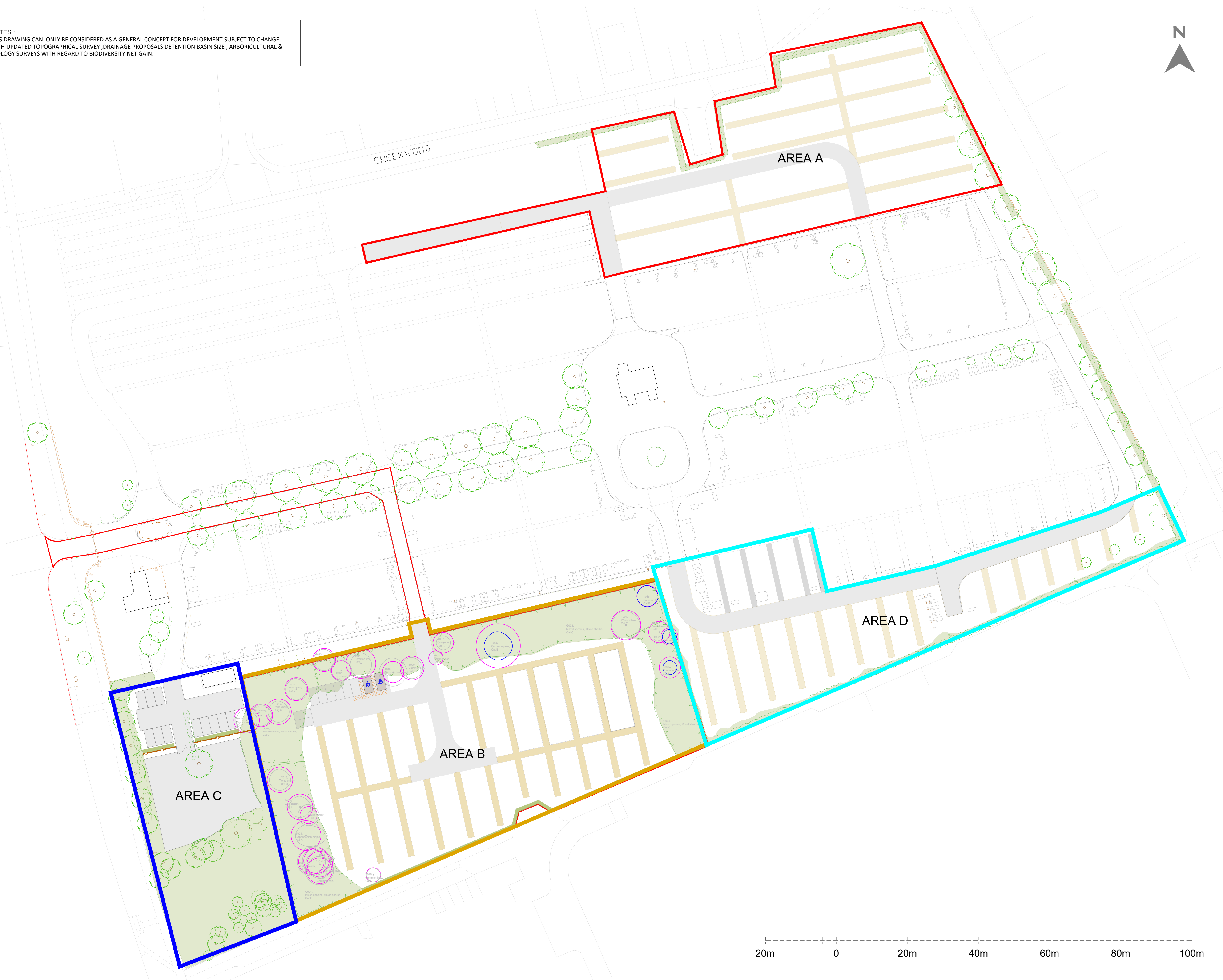
Body	Report title	Date
N/A	N/A	N/A

Contact: Nasreen Younis

Email: nasreen_younis@middlesbrough.gov.uk

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NOTES :
THIS DRAWING CAN ONLY BE CONSIDERED AS A GENERAL CONCEPT FOR DEVELOPMENT.SUBJECT TO CHANGE
WITH UPDATED TOPOGRAPHICAL SURVEY ,DRAINAGE PROPOSALS DETENTION BASIN SIZE , ARBORICULTURAL &
ECOLOGY SURVEYS WITH REGARD TO BIODIVERSITY NET GAIN.



NOTE:

Discrepancies to be brought to the attention of the author. Not for construction.

Any areas given are approximate only and should be checked with the QS.

Electronic drawings are uncontrolled documents and are issued for information only. Any dimensions not nominated must be referred to the author for confirmation.

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KEY:

Rev.	Date	Revision Notes	By
01	01.07.25	Option 2 of 2 burials and a path preferred by client. amended accordingly and burial numbers adjusted .	PC
02	24.09.25	Amendments as per client instruction	PC
03	26.09.25	Amendments as per client instruction	PC

Client:

MIDDLESBROUGH COUNCIL

Project

THORNTREE CEMETERY

Title

BLOCK PLAN

Drawing No.

CDS-C1163-P01-L-001

Rev

003

Scale

1:500 @ A1

Date

05.03.2025

CDS

Cemeteries & Crematoria

Parks & Leisure

Environmental Solutions

Drawn

PC

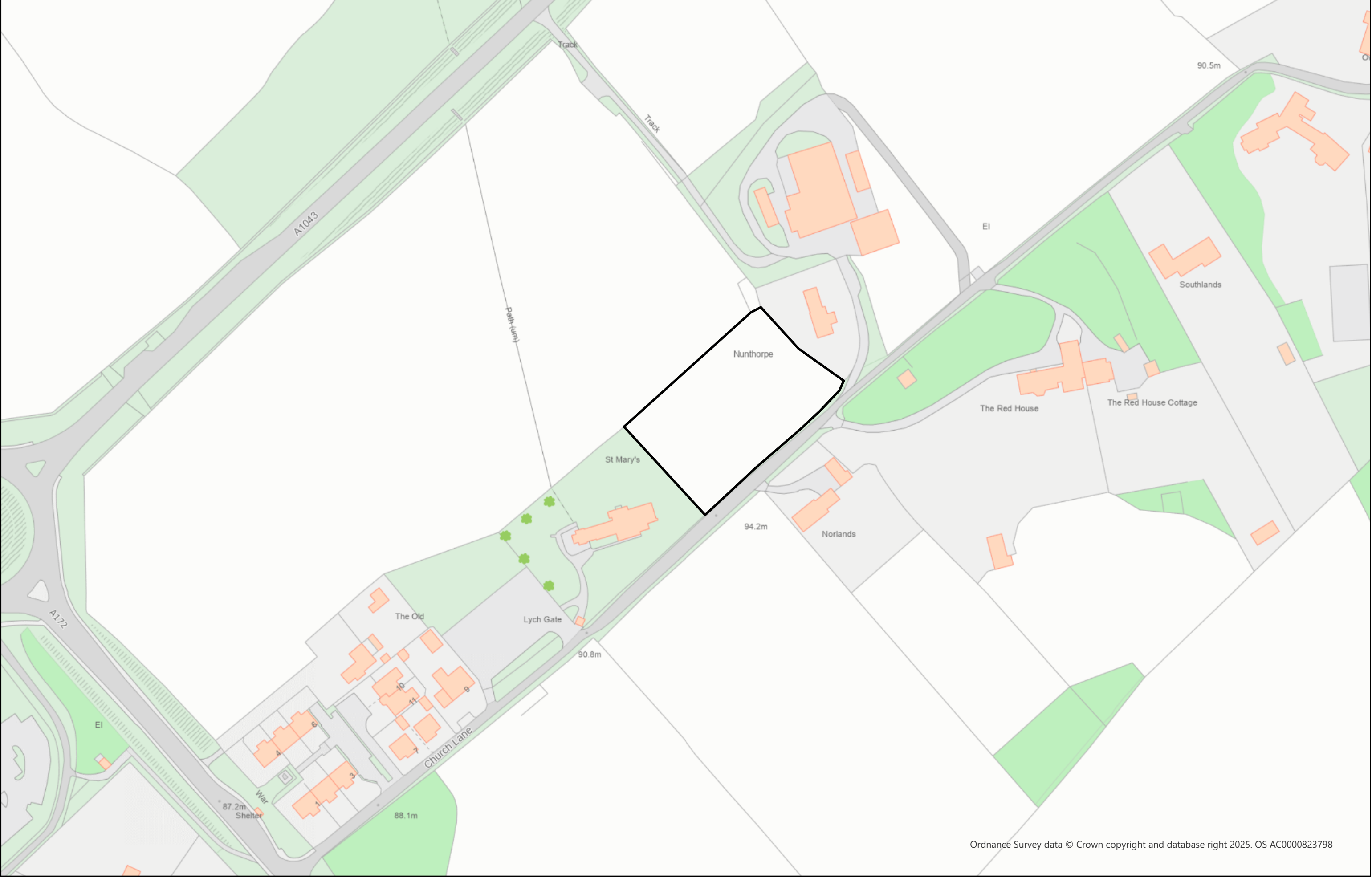
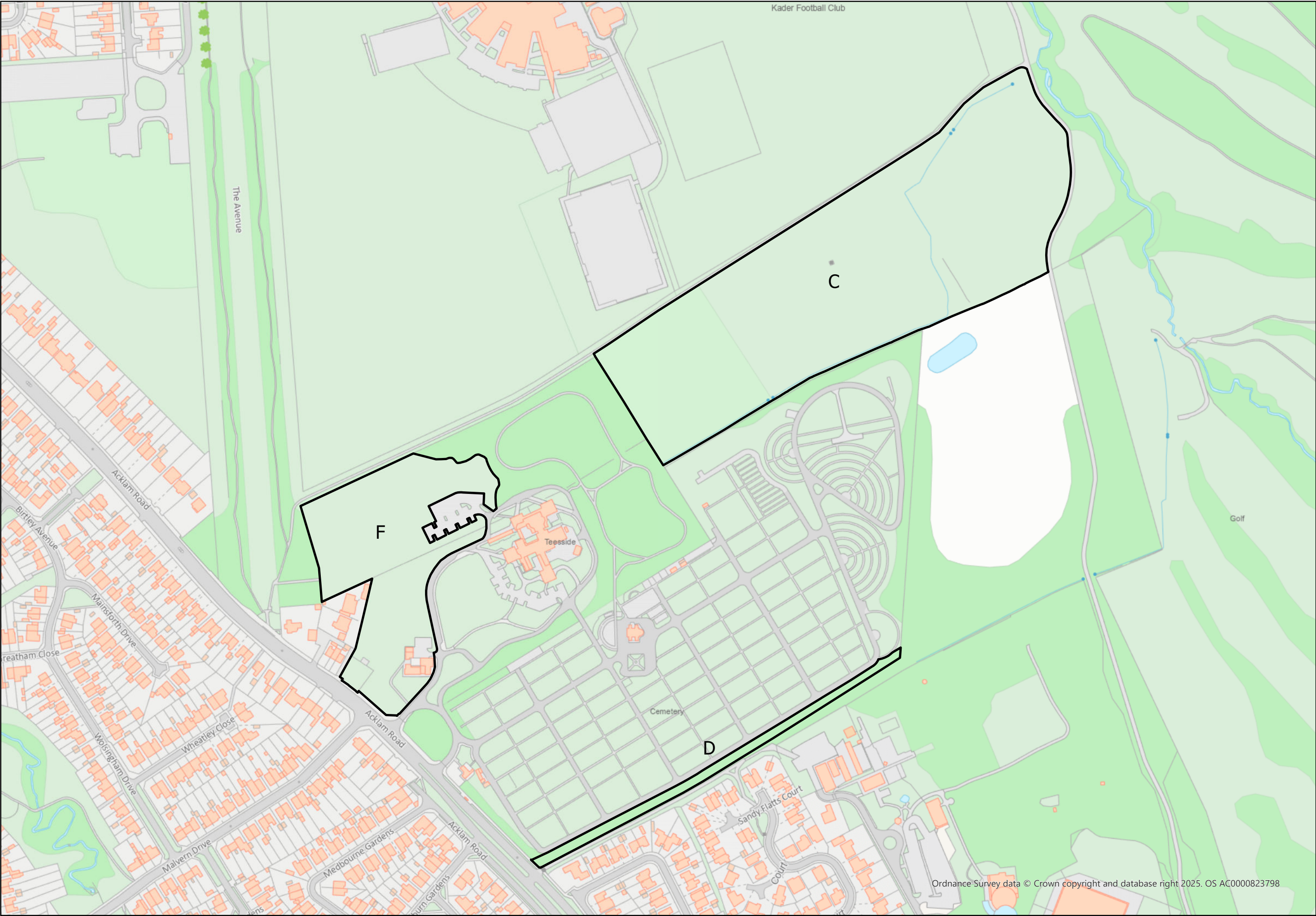
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BC

B-51 Wrest Park | Silsoe | Bedford | MK45 4HS

www.thecdsgroup.co.uk | info@thecdsgroup.co.uk | 01525 864387

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Template for Impact Assessment Level 1: Initial screening assessment

Subject of assessment:	Cemetery Provision – Middlesbrough			
Coverage:	Service Specific			
This is a decision relating to:	☐ Strategy	☐ Policy	☒ Service	☐ Function
	☐ Process/procedure	☐ Programme	☐ Project	☐ Review
	☐ Organisational change	☐ Other (please state)		
It is a:	New approach:	☐	Revision of an existing approach:	☒
It is driven by:	Legislation:	☐	Local or corporate requirements:	☒
Description:	Key aims, objectives and activities Burial provision in Middlesbrough is limited, the Council is proposing actions to increase supply to continue to meet demand for burial provision. Statutory drivers The Local Government Act 1972 provides that Local Authorities (as burial authorities) may provide and maintain cemeteries whether in or outside their area. This also extends to burial purposes under the Cremation Acts of 1902 and 1952. The Local Authorities' Cemeteries Order 1977 further provides that a burial authority may enclose, lay out and embellish a cemetery in such manner as they think fit, and from time to time improve it, and shall keep the cemetery in good order and repair, together with all buildings, walls and fences thereon and other buildings provided for use therewith. The Local Authority has no statutory duties to provide burial provision however it has provided provision for over a century and endeavours to continue to do so. Differences from any previous approach Middlesbrough Council currently provide burial space in Acklam and Thorntree Cemetery but has a limited supply. There is some scope to expand within Thorntree (subject to planning consent) which is the primary objective. Following this, additional feasibility work is required to assess whether or not there is any capacity within the Acklam site, or on its periphery. Additionally, there is a need to assess for future sites, for longer-term burial provision. Key stakeholders and intended beneficiaries (internal and external as appropriate) Residents of Middlesbrough – by providing burial provision in Middlesbrough this negates a resident having to seek burial provision in a neighbouring authority for their loved ones. Intended outcomes • By expanding the Thorntree Cemetery this provides a five-six year supply, which assists in the short term. • Assessment of the Acklam Cemetery and periphery sites will ascertain whether a medium term supply can be determined. • Further land site analysis of other sites (undeveloped land in Middlesbrough) will determine whether or not a longer term supply can be unlocked.			
Live date:	4 th November 2025			
Lifespan:	A permanent change.			
Date of next review:	N/A			

Screening questions	Response			Evidence
	No	Yes	Uncertain	
Human Rights Could the decision impact negatively on individual Human Rights as enshrined in UK legislation?	☒	☐	☐	There are no concerns that the report proposals could impact negatively on the human rights of individuals. The proposals will positively impact on Article 9 – freedom of thought, belief and religion as it will ensure burial continues to be available to those who believe that burial is preferable for their loved ones because of religious belief. Evidence used to assess the impact of this proposal includes analysis of burial preferences, guidance on religious needs, analysis of current capacity of cemeteries in Middlesbrough and forecasting of likely future demand.

* Consult the Impact Assessment further guidance for details on the issues covered by each of these broad questions prior to completion.

Screening questions	Response			Evidence
	No	Yes	Uncertain	
Equality Could the decision result in adverse differential impacts on groups or individuals with characteristics protected in UK equality law? Could the decision impact differently on other commonly disadvantaged groups?	☒	☐	☐	The Public Sector Equality Duty (PSED) requires that when exercising its functions the Council must have due regard to the need to: - - eliminate discrimination, harassment, victimisation, and any other conduct that is prohibited by or under this Act. - advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and - foster good relations between persons who share a relevant protected characteristic and persons who do not share it. In having due regard to the need to advance equality of opportunity, the Council must consider, as part of a single equality duty: - removing or minimising disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic. - taking steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of people who do not share it; and - encouraging people who share a protected characteristic to participate in public life or in any other activity in which participation is low. There is no identified adverse differential impact on groups or individuals with characteristics protected in UK equality law. The proposal is particularly relevant to the Religion and/ or belief protected characteristic. It will ensure burial continues to be available to those who believe that burial is preferable for their loved ones because of religious belief. Evidence used to assess the impact of this proposal includes analysis of burial preferences, guidance on religious needs, analysis of current capacity of cemeteries in Middlesbrough and forecasting of likely future demand.
Community cohesion Could the decision impact negatively on relationships between different groups, communities of interest or neighbourhoods within the town?	☒	☐	☐	No direct impact on community relationships is envisaged. The proposal will ensure there continues to be capacity within Middlesbrough's cemeteries to support the needs of different communities that exist within Middlesbrough. Evidence used to assess the impact of this proposal includes analysis of burial preferences, guidance on religious needs, analysis of current capacity of cemeteries in Middlesbrough and forecasting of likely future demand.

Screening questions	Response			Evidence
	No	Yes	Uncertain	
Armed Forces Could the decision impact negatively on those who are currently members of the armed forces of former members in the areas of Council delivered healthcare, compulsory education and housing policies?	☒	☐	☐	No direct impact on current or former members of the armed forces. Evidence used to assess the impact of this proposal includes analysis of burial preferences, guidance on religious needs, analysis of current capacity of cemeteries in Middlesbrough and forecasting of likely future demand.
Care leavers Could the decision impact negatively on those who are care experienced?	☒	☐	☐	No direct impact on care leavers. Evidence used to assess the impact of this proposal includes analysis of burial preferences, guidance on religious needs, analysis of current capacity of cemeteries in Middlesbrough and forecasting of likely future demand.
Reducing Poverty Could the decision impact negatively on the Council's ambitions to reduce poverty in the town?	☒	☐	☐	There is no impact on ambitions to reduce poverty within the town. There are no job losses planned within the review. Evidence used to assess the impact of this proposal includes analysis of burial preferences, guidance on religious needs, analysis of current capacity of cemeteries in Middlesbrough and forecasting of likely future demand.
Next steps: ➡ If the answer to all of the above screening questions is No then the process is completed. ➡ If the answer of any of the questions is Yes or Uncertain, then a Level 2 Full Impact Assessment must be completed.				

Assessment completed by:	Nasreen Younis	Head of Service:	Sam Gilmore
Date:	04/11/2025	Date:	5/11/2025