

AGENDA

People Panel

Thursday, 06 October 2022 AT 10:00
In the Flensburg Room, Civic Centre, Carlisle, CA3 8QG

****A pre meeting for Members to prepare for the Panel will take place 45 minutes before the meeting****

The Press and Public are welcome to attend for the consideration of any items which are public.

Members of the People Panel

Councillor Glover (Chair), Councillors Finlayson, Mrs McKerrell, Mrs Mitchell (Vice Chair), Pickstone, Shepherd, Miss Whalen, Wills

Substitutes:

Alcroft, Allison, Atkinson, Bainbridge, Birks, Bomford, Brown, Collier, Ms Ellis-Williams, Mrs Glendinning, Lishman, Mitchelson, Morton, Ms Patrick, Robson, Miss Sherriff, Southward, Sunter, and Dr Tickner.

PART A

To be considered when the Public and Press are present

APOLOGIES FOR ABSENCE

To receive apologies for absence and notification of substitutions.

DECLARATIONS OF INTEREST

Members are invited to declare any disclosable pecuniary interests, other registrable interests and any interests, relating to any items on the agenda at this stage.

PUBLIC AND PRESS

To agree that the items of business within Part A of the agenda should be dealt with in public and that the items of business within Part B of the agenda should be dealt with in private.

MINUTES OF PREVIOUS MEETING

7 - 18

The Chair will move the minutes of the meeting held on 25 August 2022 as a correct record. The only part of the minutes that may be discussed is their accuracy.

(Copy minutes herewith)

A.1 CALL-IN OF DECISIONS

To consider any matter which has been the subject of call-in.

A.2 UPDATE ON WORK TO SUPPORT REFUGEES AND ASYLUM SEEKERS FROM CARLISLE REFUGEE ACTION GROUP AND CUMBRIA COUNTY COUNCIL

**19 -
28**

Portfolio:	Communities, Health and Wellbeing
Directorate:	Cross Cutting
Officer:	Head of Policy and Communications
Report:	PC.26/22 herewith

Background:

The Head of Policy and Communications to submit a report providing an update from Carlisle Refugee Action Group and Cumbria County Council. Representatives of Carlisle Refugee Action Group and Cumbria County Council will attend the meeting.

Why is this item on the agenda?

The Panel requested an update on the work of Carlisle Refugee Action Group.

What is the Panel being asked to do?

Consider and comment on the report and verbal updates.

A.3 CARLISLE WELFARE REFORM BOARD

**29 -
34**

Portfolio:	Economy, Enterprise and Housing
Directorate:	Cross Cutting
Officer:	Tammie Rhodes, Homelessness Prevention and Accommodation Manager
Report:	GD.58/22 herewith

Background:

The Corporate Director of Governance and Regulatory Services to submit an overview of the work of the Carlisle Welfare Reform Board. The Chair of the Welfare Reform Board will attend the meeting.

Why is this item on the agenda?

The Panel requested an update of the work of the Welfare Reform Board.

What is the Panel being asked to do?

Review the content of the report and note the progress of the partnership.

A.4 REVENUE BUDGET OVERVIEW AND MONITORING REPORT - APRIL TO JUNE 2022

**35 -
56**

Portfolio:	Finance, Governance and Resources
Directorate:	Finance and Resources
Officer:	Alison Taylor, Corporate Director of Finance and Resources
Report:	RD.32/22 and Minute Excerpt herewith

Background:

The Corporate Director of Finance and Resources to submit a report providing an overview of the Council's overall budgetary position for the period April to June 2022 for revenue schemes only. The matter was considered by the Executive on 30 August 2022.

Why is this item on the agenda?

Budget monitoring report.

What is the Panel being asked to do?

To scrutinise the variances in the report.

A.5 CAPITAL BUDGET OVERVIEW AND MONITORING REPORT APRIL TO JUNE 2022

**57 -
74**

Portfolio:	Finance, Governance and Resources
Directorate:	Finance and Resources
Officer:	Alison Taylor, Corporate Director of Finance and Resources
Report:	RD.32/22 and Minute Excerpt herewith

Background:

The Corporate Director of Finance and Resources to submit a report providing an overview of the Council's overall budgetary position in the City Council's capital programme for the period April to June 2022. The matter was considered by the Executive on 30 August 2022.

Why is this item on the agenda?

Budget monitoring report.

What is the Panel being asked to do?

To scrutinise the variances contained within the report.

A.6 EMERGENCY PLANNING – WINTER READINESS AND LGR PREPARATION

**75 -
80**

Portfolio	Leader
Directorate:	Community Services
Officer:	Steven O'Keeffe, Head of Policy and Communications
Report:	PC.25/22 herewith

Background:

The Head of Policy and Communications to submit a report which updates the Panel on emergency planning, winter readiness and related work in the LGR programme.

Why is this item on the agenda?

Item agreed by the Chairs and Deputy Chief Executive at their work planning meeting in May 2022.

What is the Panel being asked to do?

Note and comment on the report.

A.7 CARLISLE LOCAL CYCLING AND WALKING INFRASTRUCTURE PLAN (LCWIP) – ONE YEAR ON.

**81 -
112**

Portfolio:	Culture, Heritage and Leisure
Directorate:	Community Services
Officer:	Darren Crossley, Deputy Chief Executive
Report:	CS.30/22 herewith

Background:

The Deputy Chief Executive to submit an update in progress with the Local Cycling and Walking Infrastructure Plans (L-CWIP) for Carlisle.

Why is this item on the agenda?

Item agreed by the Chairs and Deputy Chief Executive at their work planning meeting in May 2022.

What is the Panel being asked to do?

Consider and comment on the information provided.

A.8 OVERVIEW REPORT

**113 -
118**

Portfolio:	Cross Cutting
Directorate:	Cross Cutting
Officer:	Rowan Jones, Overview and Scrutiny Officer
Report:	OS.22/22 herewith

Background:

To consider a report providing an overview of matters related to the work of the People Panel.

Why is this item on the agenda?

The People Panel operates within a Work Programme which is set for the 2022/23 municipal year. The Programme is reviewed at every meeting so that it can be adjusted to reflect the wishes of the Panel and take into account items relevant to this Panel in the latest Notice of Executive Key Decisions.

What is the Panel being asked to do?

- Note the items (within Panel remit) on the most recent Notice of Executive Key Decisions
- Discuss the Work Programme and prioritise as necessary.

PART B

To be considered when the Public and Press are excluded from the meeting

-NIL-

Enquiries, requests for reports, background papers etc to:
democraticservices@carlisle.gov.uk



People Panel

Date: Thursday, 25 August 2022

Time: 10:08

Venue: Flensburg Room

Present: Councillor Mrs Christine Finlayson, Councillor Colin Glover, Councillor Mrs Ann McKerrell, Councillor Mrs Linda Mitchell, Councillor Miss Jeanette Whalen, Councillor Christopher Wills, Councillor James Bainbridge (for Councillor David Shepherd)

Also Present: Councillor Mallinson (J) - Leader
Councillors Mrs Mallinson - Communities, Health and Wellbeing Portfolio Holder
Councillor Higgs - Culture, Heritage and Leisure Portfolio Holder

Officers: Deputy Chief Executive
Head of Health and Wellbeing
Policy and Scrutiny Officer

PEP.28/22 APOLOGIES FOR ABSENCE

An apology for absence was submitted on behalf of Councillor David Shepherd.

PEP.29/22 DECLARATIONS OF INTEREST

No declarations of interest were submitted.

PEP.30/22 PUBLIC AND PRESS

RESOLVED - That items in part A be dealt with in public and the items in private be dealt with in Part B.

PEP.31/22 MINUTES OF PREVIOUS MEETINGS

RESOLVED 1) The Chair signed the minutes of the meeting held on 9 June 2022.

2) That the minutes of the meeting held on 14 July 2022 be approved.

PEP.32/22 CALL-IN OF DECISIONS

There were no items which had been subject of call-in.

PEP.33/22 VICTORIAN AND TURKISH BATHS

The Head of health and Wellbeing submitted report CS.27/22 which set out the background and Council's current position in relation to the Turkish Baths (TBs).

In relation to the meeting of the former Health and Wellbeing Scrutiny Panel meeting in February 2022, the Chair noted that Panel had made a resolution which required Officers to work with The Friends of the Carlisle Victorian and Turkish Baths to explore the potential suitability of a Community Asset Transfer of the site: he asked whether work on that matter had commenced?

The Head of Health and Wellbeing understood that the work had commenced and was being undertaken by colleagues in Property Services.

The Chair welcomed Ms Minns and Ms Blackburn from The Friends of the Carlisle Victorian and Turkish Baths ('The Friends') to the meeting.

Ms Minns and Ms Blackmore gave a presentation covering: timeline and key dates in The Friends' programme plan; scope of the Viability Study commissioned by The Friends; Phase 1 outputs; Phase 2; next steps and recommendations.

The Friend's programme sought to maintain the TBs function and to enhance it facilities. The Viability Study was due to complete in October 2022 after which applications for further funding would be made to generate a detailed Business Plan which would set out future funding options. Only once the Development Study was complete would The Friends be in a position to be able to participate in a Community Asset Transfer.

The single biggest concern for The Friends and users of the TBs was the potential for the site to close in October 2022 when The Pools facility closed and GLL staff were no longer employed at the site. Members of The Friends had written to the Council twice on the matter, but had only received a response to the initial correspondence. Ms Minns considered the lack of response both unfair and disappointing as The Friends hoped in good faith to work with the Council on the future of the TBs. The City Council had voted to close The Pools but it had not voted to close the Turkish Baths, it was hoped that the Panel would assist in helping clarify the matter.

Were the TBs to be closed at the same time as The Pools, the cost of mothballing would need to be considered as it was a lengthy process which required the completion of an Investment Appraisal by a suitable expert, it was not known if the Council was aware of the need for this or whether it had commenced such work. In the event of the TBs being closed in October, to minimise damage to the TBs from it not being in operation, the Council was asked to consider a "Meanwhile Tenancy " for The Friend which would allow the group to continue to access the site and partially operate it through the provision of tours.

It was known that works in respect of the Borderlands Station Gateway project would commence early in 2023, it was then possible for the TBs to remain in operation up until that time. The Friends sought confirmation as to whether the TBs were included in the Shared Prosperity Fund Investment Plan, and if not would the Executive agree to a budget virement at its meeting of 31 August 2022 to allow the TBs to continue to operate until the end of December 2022? The Friends further hoped that the Panel would push for clarity on whether the TBs would close in October 2022.

An overview of the scope of The Friends' Viability Study was provided along with its funding and Phase 1 Outputs. The Study was being undertaken by 4th Street an organisation with a history of working with local authorities to bring similar facilities into use. 4th Street had worked with Swindon Council on its Hydro centre and Turkish Baths which were estimated to bring £3.7M of economic benefits to the local area.

The Station Gateway Project had the potential to provide significant place making benefits for the TBs and the Baths would equally add to the setting of the southern entrance to the gateway preventing it from turning into an area of anti-social behaviour. It was important that this aspect was understood and The Friends' proposal were considered in the context of the developed Station Gateway and the Citadels project i.e. the locating of the University of Cumbria in the Citadels. The £400,000 Borderlands funding needed to be deployed in a way that would support the future use of the TBs, for example ensuring utilities supplies were able to support ongoing future use and a new accessible pedestrian access on the elevation adjacent to George Square.

The Turkish Baths themselves remained the core offer at the site, plans to provide additional facilities at the site would be considered would be developed through The Friends' work. The Friends' were a committed group of volunteers working at pace on the project, they were committed to securing funding and to renew the site and expect works would complete and the TBs to reopen in 2026.

The TBs operated in one tenth of The Pools site and due to changing room constraints were limited to 12 visitors at a time. Analysis by 4th Street indicated that 70% occupancy rate was good for a day spa, a level the TBs were already achieving 60% occupancy. It was anticipated that with expanded facilities visitor numbers would be between 44,000 to 49,000 per annum with a projected EBITDA of 30-40% subject to variation and maintenance costs for a heritage building.

In terms of a swimming offer at the TBs, The Friends' architect had advised that use of the 20m pool was cost prohibitive. As such the Design Brief would consider other options for the use of that space going forward. The University of Cumbria had expressed a strong interest in the training opportunities would its Institute of Health and wider student population by was unable to commit to becoming an operating partner for the facility, other potential operating partners had been contacted but an operating partner had for the facility had not been secured. A summary of the Phase 2 of The Friends' Viability Study was given along with, the next steps and measures to reduce the environmental impact of the facility.

The Friends suggested the following 6 recommendations to the Panel:

- 1) To confirm the cost of mothballing the Turkish Baths
- 2) To consider 'Meanwhile Tenancy'
- 3) To confirm if Baths is included in Shared Prosperity Fund Investment Plan and if not Executive to agree budget virement at meeting on 31 August for operation of Turkish Baths to end of December 2022.
- 4) The Executive to invite The Friends of the Carlisle Victorian and Turkish Baths to a meeting with the Cumberland Council Leader to discuss the future operation of the Turkish Baths
- 5) The Executive to support the allocation of the £400,000 Borderlands funding to future proof the stand alone operation of the Turkish Baths.
- 6) To confirm to The Friends of the Carlisle Victorian and Turkish Baths if the 10m pool should be reserved for a hydrotherapy pool.

The Chair thanked Ms Minns and Ms Blackburn for their presentation. He invited the Panel to put questions to The Friends:

In considering the presentation, Members raised the following questions and comments:

- A Member asked for further detail on plans to include a laundry at the TBs, and whether The Friends had approached the National Trust regarding it taking over the facility?

Ms Minns responded that the Business Plan would focus on the core offer of the facility which was the Turkish Baths. The Friends had been in discussions with a community laundry in Liverpool and considered that there was space within the site at Carlisle to provide a laundry, which may be run by a third party, for example a charity. The core offer of the TBs would be financially sustainable on its own, but The Friends felt it important that all space in the facility was used.

The Friends were not in a position to offer the TBs to the National Trust as they were not the owners of the building. Furthermore, it was understood that at the current time the National Trust was not seeking to expand its property portfolio.

The Chair commented that funding bodies required groups to own or lease the buildings for which they sought monies, he asked whether The Friends had a sense from the funding bodies they had approached that they were warm to the group's ideas but were unable to go forward due to The Friends not owning the building.

Ms Minns responded that this was the case and cited that the Architectural Heritage Fund would require a Community Asset Transfer to have taken place, or for the Council to confirm its commitment to such a transfer in order for the group to access some pots of funding.

- Did the organisations, approached by The Friends that had declined to become partners in the project, indicate why they did not wish to become involved?

Ms Minns clarified that the reference in the presentation had related only to not being able to find an operating partner for the 10m pool as a hydrotherapy pool. She gave an overview of the organisations which The Friends had approached, however, there were other potential providers who may be interested in the role.

The Member further asked what response had been received from the NHS on the matter.

Ms Minns advised that no response had been received from the NHS. Cumbria County Council's Health and Wellbeing Board had declined a presentation from The Friends, referring the group to Carlisle City Council as lead authority for health in Carlisle.

The Friends were focused on the core offer of the TBs, the 10m pool had the potential to be operated as a hydrotherapy pool. It was beyond the capacity of the group to deliver that facility alone, the Local Enterprise Partnership were supportive of the proposal and Ms Minns implored the Council to use its office to bring together the stakeholders needed to explore the idea.

Regarding The Friends request that the Executive indicate at its meeting on 31 August 2022, whether the 10m pool should be reserved for use as a hydrotherapy pool, the Chair advised that the People Panel was not able to add items to the Executive meeting agenda, he asked what the impact this was likely to have on The Friends' programme?

Ms Minns replied that it would have an impact on the work of the architect in developing uses for the space. The Friends did not wish to use up a design option that may not materialise due to viability, as such it would be useful to know now whether that proposed use was feasible. However, the architect may be instructed to draft uses that would not preclude the use of the pool in the future.

The Chair noted that the Council had undertaken similar conversations regarding the provision of a hydrotherapy pool as part of the Sands Centre Redevelopment.

The Deputy Chief Executive gave an overview of the discussion the Council had undertaken in relation to a hydrotherapy pool, noting that whilst other stakeholders were supportive of such a facility, issues relating to capacity and ongoing revenue costs had meant they were not in a position to commit to such a facility.

The Communities, Health and Wellbeing Portfolio Holder added that the NHS did not have budget for such a facility, nor was the matter on its agenda.

In relation to points in The Friends' presentation, that a request for a meeting with herself in September 2021 had been declined, the Communities, Health and Wellbeing Portfolio Holder stated that she had attended a session with The Friends. She was not aware of a request to meet in September 2021, however, the relevant Executive Member for the group was the Culture, Heritage and Leisure Portfolio Holder.

At the Council meeting of 19 July 2022, the Communities, Health and Wellbeing Portfolio Holder had agreed to set up a meeting with the relevant Portfolio Holder of the Cumberland Shadow Authority, which was currently being progressed. Additionally she had written to the Leader of the Shadow Authority on the matter, and was also looking to facilitate a meeting with The Friends and relevant parties at the Shadow Authority.

- A Member noted the presentation stated "Projected EBITDA 30 - 40% (subject to variation in maintenance and operation costs for heritage building)". A similar facility in Yorkshire had been subject of a sudden £220,000 maintenance cost, he asked whether the risk of such a circumstance occurring at the TBs had been fully considered? The Member further commented that the facility in Yorkshire had received government funding and felt that in light of such an event the government may be more circumspect in considering funding similar projects.

Ms Minns explained that maintenance costs for the TBs would be considered in detail at the Development Study stage. In relation to the facility in Yorkshire, The Friends understood that the sudden maintenance issue had arisen from a contractor handing over a building that was not fit for purpose.

Ms Minns did not consider there was a lack of appetite from government to invest in such projects as the TBs, reiterating the success of the facility at Swindon which demonstrated the potential to support health and wellbeing.

The Chair asked what plans The Friends had in relation to a Meanwhile Tenancy?

Ms Minns responded that it would enable the TB building to remain occupied thereby reducing the likelihood of vandalism if the site was closed in October 2022. A Meanwhile Tenancy would also allow for tours and events to go ahead in the building as well as maintenance work. However, The Friends' preference was for the TBs to remain open until the commencement of the Station Gateway project works.

The Leader commented that, following the Council meeting of 19 July 2022, he had sought to arrange a meeting with the Leader of the Shadow Authority to discuss the TBs, which would take place in September. Until the meeting had taken place, he was not in a position to go further, the outcome of the meeting would flavour the City Council's perspective on how to progress the issue of the TBs. He recognised that the timing of Local Government Reorganisation made The Friends' work more difficult and noted that the Leader of the Shadow Authority had an extremely busy workload.

The Leader had spoken to residents in Harrogate which had a similar facility to the TBs and

noted that whilst there was general support for it, the facility was seen as too expensive for some residents, with the lower entry price point costing over £20, he felt such a pricing structure would be difficult for Carlisle. He acknowledged that the number of visitors to the TBs had increased to around 150 per week, half of which were repeat visitors. The cost of a visit to the TBs was currently £7 to the user with the City Council paying around a £24 subsidy per visit, which was significantly greater than the subsidy the Council paid towards golf provision in the district.

Regarding the cost of mothballing the TBs, the Leader did not consider it would be immense, and noted the site had been closed during the lockdown restrictions imposed in relation to the Covid 19 pandemic. The TBs would close either in October 2022 or at the commencement of works for the Station Gateway Project in early 2023; the key aspect of which was the commencement of demolition works which were to be decided by Cumbria County Council as the Lead Authority for the project.

The Executive would decide whether the TBS would close in October 2022 or remain open until early 2023, that decision would be impacted by discussion with the Leader of the Shadow Authority, however, he would not be in a position to offer a cast iron guarantee for the future of the site.

The Leader concluded by stating that he was keen to support the Turkish Baths on the new Cumberland Council.

The Chair sought clarification from the Leader that closure of the TBs in October 2022 when GLL staff decanted from the existing pools site to the Sands Centre was not necessary and that the facility may remain open until the demolition works associated with the Station Gateway Project commenced.

The Leader stated that the Executive was to decide whether to ask GLL to continue to operate the TBs until the commencement of the Station Gateway works. He reiterated that the meeting with the Leader of the Shadow Authority would assist the Executive in coming to a view on the matter.

The Chair asked the Leader, if GLL were agreeable to continue to operate the TBs in the period between the closure of The Pools and the Station Gateway works beginning would budget be found to allow the continued operation of the TBs?

The Leader responded that he would not 'run the clock down' on the matter, a clear decision would be made. Were it decided that the TBs were to continue to operate from October 2022, the necessary funding would be secured through budget virements.

The Deputy Chief Executive added that any decision in respect of budget virements may be taken via a Portfolio Holder Decision.

The Chair asked what impact the proposed transfer of the site to Cumbria County Council was anticipated to have?

The Deputy Chief Executive explained that the proposed transfer was to assist the County Council in its role as Lead Authority for the Station Gateway and was temporary in nature, the process had not yet been completed but it was not expected to impact on the work of The Friends.

Regarding the £400,000 Borderlands funding, the Chair asked whether discussions had taken

place on how it would be spent?

The Deputy Chief Executive stated that he had not been party to any such discussions. The monies were allocated to ensure heat and power supplies under ongoing use, it was not clear whether that would preclude mothballing, he undertook to clarify the situation, but noted that the matter would be for the Shadow Authority / Cumberland Council to decide.

The Chair invited the Panel to consider the recommendations suggested by The Friends in their presentation. Members discussed each proposed recommendation, and it was:

RESOLVED - 1) That the Deputy Chief Executive provide a written response to the Panel setting out the costs of mothballing the Turkish Baths and confirming the current operational costs.

2) That Scrutiny recommended the Council to consider a Meanwhile Tenancy.

3) That the Deputy Chief Executive provide a written response to the Panel setting out whether the Turkish Baths was included in the Council's UK Shared Prosperity Fund Investment Plan submission.

4) That the Executive were asked to convene a multi-disciplinary meeting of all parties, including the The Friends of the Carlisle Victorian and Turkish Baths to discuss the future operation of the Turkish Baths.

5) That the Panel ask the Executive to support the allocation of the £400,000 Borderlands funding to future proof the stand alone operation of the Turkish Baths.

6) That the Panel ask the Executive to liaise with the NHS to clarify its position with regard to the future use of the 10m as hydrotherapy pool, and advise The Friends of the Carlisle Victorian and Turkish Baths.

7) That the Democratic Services Officer circulate to the Panel the minutes of the meeting of the Health and Wellbeing Scrutiny Panel of 17 February 2022.

8) That a further site visit to the Turkish Baths be arranged for members of the People Panel and members of the Shadow Authority.

The meeting adjourned at 12:05pm and reconvened at 12:15pm.

PEP.34/22 ANNUAL EQUALITY REPORT 2021/22 AND ANNUAL EQUALITY ACTION PLAN 2022

The Policy and Scrutiny Officer submitted report PC.24/22 the Annual Equality Report 2021/22 and Annual Equality Action Plan.

The Public Sector Equality Duty stipulated a number of duties that local authorities were required to comply with the Annual Report demonstrated how those requirements had been met between April 2021 and March 2022. The Annual Equality Action Plan 2022 set out how the Council would work towards achieving the equality objectives and address any identified issues. Local Government Reorganisation in Cumbria would influence many policy decisions in 2022/23, the Council would continue in its commitment to promoting best practice. The relevant actions from the Local Government Reorganisation Programme Policy and Performance

Workstream Delivery Plan were included in the Equality Action Plan 2022.

In considering the report and action plan, members raised the following questions and comments:

- A Member expressed concern at the increasing age profile of employees at the City Council and noted that it was an issue that was likely to transfer to the new Cumberland Council.

The Deputy Chief Executive responded that the matter was both a local authority sector and national issue. The matter had somewhat been exacerbated by changes to the employment market following the Covid 19 pandemic. In terms of the new Cumberland Council, it had determined not to place age restrictions on those accepted for apprenticeships at the organisation. The matter would be a key consideration for the new unitary authority.

- The Chair noted that the number of posts advertised in 2021/22 was higher than in 2020/21, he asked whether that was due to a catch up following the pandemic restrictions.

The Deputy Chief Executive considered the rise would be attributable to a number of factors including a catch up following the pandemic as well as the creation of new posts for example the Economic Development Programme Management Office.

The Chair noted that 92 posts had been advertised and 80 successfully filled: in relation to the unfilled posts where there any identifiable trends or significant shortages in particular areas?

The Deputy Chief Executive stated that he was not aware of any particular trends or shortages, he gave an overview of the recruitment process.

The Chair asked if the change to unitary authority may put people off from applying for advertised vacancies?

The Deputy Chief Executive explained that applicants were advised that posts at the City Council would be subject to Transfer of Undertakings (Protection of Employment) Regulations (TUPE) applied to the new Cumberland Council.

- Did the gender pay gap data on page 72 relate to men and women in the same posts or was it a comparison of role across the authority?

The Deputy Chief Executive stated that all roles had their salary determined by a job evaluation process.

The Policy and Scrutiny Officer added that figures contained in the report set out the mean and median average figures for the authority.

- The Council advertised jobs on its website, was there a facility for a person to submit a speculative CV?

The Deputy Chief Executive responded that the Council did not regularly receive or ask for CVs to be submitted.

- Did the Council offer job share, flexible working and part time working options.

The Deputy Chief Executive confirmed it was standard practice when application was submitted which indicated a requirement for any of the conditions listed by the Member to include the

applicant in the selection process. The implementation of such working practices was arranged by the manager, appointee and HR.

- Page 62 of the document pack covered Equality Impact Assessment, consultation and engagement, the Chair commented that the City Council was good at carrying out consultation and asked if there were any emergent themes?

The Deputy Chief Executive replied that it was not usually to get large quantities of responses to consultations, adding open ended questions were difficult to assess response to. The use of online consultations had been very useful, particularly during the pandemic.

The Chair agreed with the Officer's comments. In relation to the new Cumberland Council, it would determine its own equalities process, was there an opportunity for the Panel to acts as a consultee on the matter?

The Deputy Chief Executive advised the consultation on the Cumberland Plan had commenced the preceding day and had already received a number of responses. Everyone in the new authority area was invited to participate and form a view of the Plan.

The Communities, Health and Wellbeing Portfolio Holder added that Portfolio Holders at the City Council were liaising with their counterparts at the Shadow Authority about their remits.

RESOLVED - 1) That Officers be thanked for their production of the report and work over the years to drive the equality agenda forward.

2) That all staff and partners be encouraged to participate in the consultation on the Cumberland Plan.

3) That an offer be made to the Shadow Authority for the People Panel to act as consultee in relation to the equalities processes for the new Cumberland Council.

PEP.35/22 QUARTER 1 PERFORMANCE REPORT 2022/23 AND UPDATE ON CARLISLE PLAN DELIVERY PROGRESS

The Deputy Chief Executive submitted the Quarter 1 Performance Report 2022/23 and Update on Carlisle Plan Delivery Progress (PC.21/22).

In considering the report Members raised the following questions and comments:

- What provision was being made to pay residents the £150 Council Tax rebate who did not pay their Council Tax by Direct Debit and who had not yet received their rebate?

The Communities, Health and Wellbeing Portfolio Holder responded that those who paid their Council Tax by Direct Debit had received their rebate in May. Of those who did not pay by Direct Debit, applications had been submitted and monies paid out. There were a small number of household who were levied a 0% Council Tax bill for whom the Council did not have bank details and so could not make a payment to. Efforts had been made to contact those households, where no response was received the monies would be credited to the relevant account so that it may be paid when contact was resumed as they remained eligible for the rebate.

- Did anyone who emailed the Council's Customer Services team receive an automated reply

confirming their message had been received?

The Deputy Chief Executive understood that the system did generate an automated response.

- The target for processing new benefits claims was 19 days, given the cost of living crisis was it possible for that process to be accelerated?

The Deputy Chief Executive advised that there were ways to adapt the existing process for example by taking a risk based approach to checks as some other authorities used. It was possible that an action plan on the matter may be developed.

The Chair commented that it was important to strike a balance between processing the applications as quickly as possible so that residents may receive their monies at the earliest opportunity and not making staff workload unmanageable.

- Was the difficulty in delivering bathroom adaptations under the Disabled Facilities Grants (DFGs) a recent issue or a developing trend?

The implementation of such works had been hindered by the impact of the pandemic which had affected materials costs and supply chains as well as the viability of the works to smaller local contractors. It had been a challenge for Officers and whilst it was hoped that the trend would lessen a return to normal was not anticipated for some time. The new unitary authority being larger in scale than the city council may adopt a different procurement model

RESOLVED - 1) That the Quarter 1 Performance Report 2022/23 and update on Carlisle Plan delivery progress be noted.

2) That staff be thanked for meeting targets for processing new benefits claims and the disbursement of the Council Tax Rebate monies.

3) That Officers explore if it is possible to accelerate the process for paying new benefits claims given the cost of living crisis.

PEP.36/22 OVERVIEW REPORT

The Policy and Scrutiny Officer submitted report OS.20/22 which gave an overview of matters relating to the People Panel. The Panel had agreed to conduct a Task and Finish Group into the 'Cost of Living Crisis', invitations for an initial meeting in September would be circulated in the coming week.

Paragraph 4 of the report set out potential changes to the Scrutiny Panel remit in relation to housing: Homelessness (strategy, hostels and prevention); Housing - empty properties, standards and improvements; and, Housing advice and support move from the Place Panel remit to the People Panel remit. The respective Chairs had met and agreed the changes. The Policy and Scrutiny Officer advised that the next step was to formally write to the Monitoring Officer with the request that the Constitution be updated with the changes. The Panel indicated its assent.

RESOLVED - 1) That the Overview Report be noted (OS.20/22)

2) That the Policy and Scrutiny Officer write to the Monitoring Officer requesting that the Council's Constitution be amended by removing the following items from the Place Panel remit and adding them to the People Panel remit:

- Homelessness (strategy, hostels and prevention);

- Housing - empty properties, standards and improvements; and,
 - Housing advice and support
- 3) That the thanks be given to the Chair and members of the Place Panel for agreeing to the amended remits.

The Meeting ended at: 13:15

Meeting Date: 06/10/2022
 Portfolio: Communities, Health and Wellbeing
 Key Decision: No
 Policy and Budget Framework: No
 Public / Private: Public

Title: Update on Work to Support Refugees and Asylum Seekers from Carlisle Refugee Action Group and Cumbria County Council
 Report of: Head of Policy and Communications
 Report Number: PC.26/22

Purpose / Summary:

This report presents updates from Carlisle Refugee Action Group and Cumbria County Council on their work in supporting refugees and asylum seekers in Carlisle and Cumbria.

Recommendations:

Members are asked to:

1. Consider and comment on the content of the report and the verbal updates from Carlisle Refugee Action Group and Cumbria County Council.

Tracking

Executive:	
Scrutiny:	People 06/10/22
Council:	

1. Background

- 1.1 At their meeting of 09 June 2022, People Panel agreed that they would like an update on the work of Carlisle Refugee Action Group (CRAG). This is provided in appendix 1.
- 1.2 Cumbria County Council lead the local government response on refugee and asylum seeker support in Cumbria. The County Council have provided an overview of their role in appendix 2.
- 1.3 The City Council has a specific role as a partner in the Refugee Resettlement Programme in Cumbria. This role is in liaising with registered providers (housing associations) to secure appropriate accommodation for refugees prior to their arrival in the city. We also support community groups who independently offer accommodation to refugee families. This Refugee Resettlement Programme is distinct from the Homes for Ukraine Scheme and asylum seeker programmes.
- 1.4 It is important to be clear on the definitions of refugees and asylum seekers:

An asylum seeker is someone who has arrived in the country and asked for asylum. While their request (asylum claim) is being considered in a legal process by the Government, they are known as an asylum seeker. During this period, they do not have the same rights as a British Citizen, or a refugee. It is not illegal to seek asylum and the Government has some obligations to people who are seeking asylum, while their claim is being processed. If the Government accepts an asylum claim, then it means that the person has been legally recognised as a refugee.

A refugee is defined in the Refugee Convention (sometimes known as the Geneva Convention), passed by the United Nations in 1951 as a person who: *“owing to well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group or political opinion is outside the country of his nationality and is unable or owing to such fear, is unwilling to avail himself of the protection of that country;”*

2. Recommendations

- 3.1 The Panel are recommended to consider and comment on the content of the report and the verbal updates from Carlisle Refugee Action Group and Cumbria County Council.

3. Contribution to the Carlisle Plan Priorities

3.1. This report supports the Carlisle Plan's priorities by promoting equality of opportunity for all and seeking to improve the health and wellbeing of the people of Carlisle.

Contact Officer:

Rowan Jones

Ext: 7257

Appendices

attached to report:

1. Appendix 1 – City Council Presentation by Carlisle Refugee Action Group
2. Cumbria County Council - Update
3. Cumbria county Council - Information about Schemes

Note: in compliance with section 100d of the Local Government Act 1972 the report has been prepared in part from the following papers:

- **None**

CORPORATE IMPLICATIONS:

LEGAL -

FINANCE –

EQUALITY –

INFORMATION GOVERNANCE –

Appendix 1

City Council Presentation by Carlisle Refugee Action Group

Carlisle Refugee Action Group (CRAG) was formed in 2015 by a group of volunteers who wished to send humanitarian aid to those affected by the Refugee Crisis in Europe. The main aim of the group was to send clothes and shelter items to people in the Calais Jungle, the camp at Dunkirk and surrounding areas in Northern France. Whilst this work has continued, even after the dismantling of the main camps, CRAG now carries out most of its work a lot closer to home.

Since September 2015 the charity Carlisle One World Centre (COWC) has offered administrative and structural support to CRAG. It is one of COWC's biggest projects. In 2017, CRAG and its volunteers started to support the first group of families from Syria under the Vulnerable Persons Resettlement Scheme when they arrived in the city from refugee camps in Lebanon.

The families have grown in number since that time to 32 and now comprise of men, women and children from Afghanistan, Iraq and Sudan. They are supported in many different ways including regular drop-in sessions and language support, in groups and one to one settings. Women are invited to join the International Women's Group (IWG)'s coffee mornings, trips and swimming sessions, and through a partnership project, PANAH, which has included yoga and wellbeing sessions. One member from each household is supported with learning to drive and taking their UK licence through an innovative PCC and Arnold Clarke funded project. Families are invited to take part in local repair cafes, clothes swaps, tree planting, art festivals and other initiatives that form part of Carlisle community and cultural life. The vast majority of them have settled well into Carlisle and some are even working for the county council as case workers and interpreters. Meanwhile CRAG has grown in size and employs a part time worker (12 hours p.w.) to work alongside the COWC Development Officer. In 2020 CRAG set up the Carlisle City of Sanctuary Group which supports a network of community organisations to welcome refugees and campaigns for Carlisle and Cumberland to become a City/County of Sanctuary.

In 2022 CRAG has had a particularly busy year. Between March and May staff and volunteers worked alongside the group of international volunteers sorting and sending aid to Poland for those fleeing the crisis in Ukraine. We brought some of our expertise to the process and were delighted to be able to help out in a small way. In May the first Ukrainian families started to arrive in the city and we were able to support them through the PANAH project for women and other IWG activities.

In April 2022 CRAG personnel were at the frontline in welcoming and supporting the new group of 140 asylum seekers in the city, with up to another 50 more having arrived and left through home office arrangements during that time. These individuals, all men, reside in the Hilltop Hotel on London Road and have been housed in 'contingency accommodation' for

an unknown amount of time. We have secured funding and donations to offer clean, new clothing to new arrivals, stationary and other items, we have organised some English classes/conversation cafes, walks, outings and welcome events such as the Welcome to Your City days in Bitts Park in June and July. We are working closely in partnership with many other voluntary and statutory organisations in supporting all of the refugees, especially the asylum seekers as there is limited statutory funding to help them. New projects include mental health support as that presents particular challenges to refugees and asylum seekers who deal with PTSD, uncertainty and fear of the future.

Finally, CRAG campaigns on key issues such as the Rwanda Policy and specific local and international refugee related campaigns with Amnesty, Care4Calais and other organisations. We work through a range of media to raise general awareness locally about the refugee crisis and to counter common myths that exist. We are in the process of writing to all local schools to offer a series of online and face to face workshops that will be delivered by Cumbria Development Education Centre (CDEC) on the topic and we are happy to deliver talks or assemblies to groups of teachers or students as well as churches and community groups.

Adrienne Gill
Development Officer
Carlisle Refugee Group and Carlisle One World Centre

Appendix 2

Cumbria County Council Update

Background - Responding to forced migration programmes

In December 2016 Cumbria Leadership Board agreed a countywide pledge to resettle 285 refugees in response to an approach from the Home Office to engage in the Syrian programme. The county council agreed to act as lead authority, co-ordinating the response from partners.

At this time the county council also signed up to the Northwest regional agreement to offer support to Unaccompanied Asylum-Seeking Children (UASC) in response to the Government's National Transfer Scheme.

The county council established a small in-house resettlement team to respond to the Syrian programme (to put in place an implementation plan for the initiative and ensure adequate casework support for families). The Adult Learning team took delivered ESOL provision; and the county council brought together a strategic partnership group to provide co-ordination and oversight and to facilitate a multi agency approach. The police, health, adult learning, DWP, the third sector and district councils are members of the group. Children's services took the lead with the UASC programme (at that time out of county placements were predominantly used).

Current position

Over time the number of forced migration programmes in operation in Cumbria has grown. A detailed overview of the focus of each scheme is set out in Appendix 3.

There have been multiple changes from government to this area of policy in the last 6-9 months for example the Homes for Ukraine scheme introduced new responsibilities for local authorities and high levels of additional work at short notice.

Other announcements made in the past few months will further extend local authority involvement in these types of migration schemes. These are:

- becoming an "assumed" Asylum Dispersal area (i.e. no ability to veto) – with effect from May 2022
- councils taking on the re-matching role for the Homes for the Ukraine scheme
- 1,000 unaccompanied minors from the Ukraine to be granted visas

There are now 4 asylum contingency hotels in operation in the county. The Home Office and Serco are the lead organisations for these, however local authorities, statutory

partners and the voluntary sector are involved in providing supplementary support for asylum seekers and working with the local communities where the hotels are based. Discussions with local authorities were also initiated in June by Serco and the Home Office about procurement of asylum dispersal accommodation in the county. This will be in addition to the contingency hotels; offering longer term accommodation for people awaiting to hear the outcome of their asylum claim. Numbers of individuals expected to move into the area are not yet known. Nor is it known when this will scheme will commence.

Cumbria is still expected to continue with ongoing resettlement of Afghan evacuees and calls for housing continue to be made by the Home Office; and a change to policy with these schemes has the potential to result in additional families in the NorthWest region presenting as homeless should they refuse offers of accommodation.

The Home Office has called for local authorities to come forward with a pledge for supporting refugees from 2023 onwards (under the United Kingdom Resettlement Scheme). Discussions are underway at present with local authorities across the county to develop a new pledge.

Community Sponsorship groups also continue to work towards bringing families into the county themselves and numbers of unaccompanied asylum seeking children (UASC) living in the county and looked after by the county council are increasing.

And finally, in addition to those refugees and asylum seekers who are in the county as a result of these managed schemes, there are other individuals and families who are seeking sanctuary in the county that public services will not be aware of.

Operational implications

Until March 2022, Cumbria's response to the various schemes and asks has been planned, co-ordinated and based around a strong multi agency approach. Collectively partners have been in a strong position to manage arrivals in the county and work with the Home Office and RSMP to deliver the schemes in a controlled way.

However, the recent changes to policy and new schemes means the landscape is changing quickly, and the scale and type of migration we are seeing is different. The volume of arrivals is increasing, there is greater variety of the countries of origin, the schemes are not all managed by local authorities, and there is much less information available about where people are moving to in the area and their needs. This means there less ability for partners to plan and co-ordinate a response in the way we have been used to; and there is less intelligence about where and what needs may arise.

A flexible and responsive approach has been needed in recent months particularly in relation to hotels and Homes for the Ukraine. Partners have had to mobilise and adapt

their operations at pace.

The third sector, voluntary and community groups have and continue to play a critical role with this area of work. They provide refugees, evacuees and asylum seekers with a wide array of support including access to basic supplies, advice and support, networking opportunities and safe places to come together. Their capacity has been stretched enormously with the increase in schemes and new groups have emerged in areas where there has been nothing previously.

Longer term combined impacts and cumulative pressures

As well as responding to the immediate short-term issues, consideration of the longer-term picture is essential and the combined impacts of the various resettlement schemes and spontaneous arrivals. The schemes outlined above relate to forced migration, however it is also important to recognise there is an increase in global migration following Brexit.

The multiple changes have the potential to create significant cumulative pressure on local services, particularly in the context of ongoing Covid-related demand and need related to cost of living issues. The change in demographics also presents a real consideration for how partners work with local communities to promote positive relations and support community cohesion, integration and inclusion.

Considerations

Developing a greater understanding of the health and wellbeing needs of refugees, evacuees and asylum seekers is essential if partners are to respond effectively.

An awareness of cultural differences is also important; and an appreciation of what good community integration looks like. A proactive approach to supporting good relations in communities will be needed and a strong programme of communication that provides information to support awareness raising.

To date the response has relied heavily on partnership working and this will need to continue into the future.

Appendix 3

Cumbria County Council - Information about Schemes

<p>Overview of Scheme and Focus</p>
<p>UK Resettlement Scheme (global) Originally the scheme supporting Syrian refugees, now extended to cover all refugees. Scheme provides resettlement of those individuals with refugee status, arrivals are managed through the Home Office.</p>
<p>UASC National Transfer Scheme The safe transfer of unaccompanied asylum-seeking children (UASC) from the entry authority to the receiving authority. Home Office led.</p>
<p>Afghan Citizen Relocation Scheme (ACRS) Resettlement of those at risk, prioritising those who assisted UK efforts and stood up for values, and the rule of law and vulnerable people. Individuals are classed as evacuees. Home Office led.</p>
<p>Afghan Relocations and Assistance Policy (ARAP) Offers relocation to those who served alongside UK armed forces in Afghanistan, predominantly those employed directly. Individuals are classed as evacuees. Home Office led</p>
<p>Bridging Hotels for Afghans Offers temporary accommodation prior to longer term resettlement for both Afghan schemes. There are no bridging hotels at present in the county. Home Office led</p>
<p>Resettlement of Hong Kong British Nationals Immigration route for British National (Overseas) status holders to come to the UK to live, study and work on a pathway to citizenship. There are currently no individuals on this scheme residing in Cumbria. Home Office led.</p>
<p>Homes for Ukraine Enabling those living in the UK to sponsor a named Ukrainian national or family to live with them. This is managed by local authorities, led by DLUHC.</p>
<p>Family Visa Scheme Allows applicants to join family members, or extend their stay, in the UK. Home Office led. No involvement of local authorities unless individual transfers onto the HfU scheme. No information available about numbers of individuals in Cumbria arrived through this scheme.</p>
<p>Asylum Contingency Accommodation Temporary accommodation in hotels for asylum seekers. Delivered by Serco for Home Office. No formal role for local authorities. 4 hotels in Cumbria. Not voluntary</p>
<p>Asylum dispersal Longer term accommodation in houses/ HMOs for asylum seekers. Delivered by Serco for Home Office. Not voluntary. Local authority to provide feedback on proposed addresses. No accommodation currently procured in Cumbria.</p>
<p>Community sponsorship Scheme Allows local volunteer groups - including charities, faith groups, neighbours and businesses – to sponsor refugee families. No formal involvement of local authorities.</p>
<p><i>Circa 1000 individuals in Cumbria known to local authorities that have arrived through schemes</i></p>

Meeting Date: 06 October 2022
Portfolio: Economy, Enterprise & Housing
Key Decision: No
Within Policy and Budget Framework YES
Public / Private Public

Title: Carlisle Welfare Reform Board
Report of: Corporate Director of Governance and Regulatory Services
Report Number: GD.58 22

Purpose / Summary:

At the request of Members of the People Scrutiny Panel, the purpose of this report is to provide an overview and update of the work of Carlisle Welfare Reform Board, which is a coordinated local partnership response which aims to mitigate the impact of welfare reform and hardship across Carlisle and district.

Recommendations:

It is recommended that members of the People Scrutiny Panel receive this report, review the contents, and note the progress of the partnership.

Tracking

Executive:	
Overview and Scrutiny:	
Council:	

1. BACKGROUND

- 1.1** Established in 2012, Carlisle Welfare Reform Board is a multi-agency partnership group which meets on a bi-monthly basis to provide an effective coordinated local partnership response to mitigate where possible, the impact of welfare reform and hardship across Carlisle and district.
- 1.2** To achieve this, the group explores and monitors local impacts (and anticipates potential impacts) of the implementation of welfare changes; shares information updates; explores best practice; challenges, supports and assists each other to ensure the best outcomes for clients.
- 1.3** The group also forms a two-way communication with the Carlisle Community Resilience Group and when necessary, the statutory Cumbria Local resilience Forum.
- 1.4** The group continues to have a focus on the following:
- a)** Identifying gaps in local services; and driving activities required to close gaps
 - b)** Sharing timely pertinent information in relation to welfare reform, hardship and other external factors across Carlisle and district; and use this information to inform and support co-ordinated responses where possible
 - c)** Ensuring planned and co-ordinated welfare reform / hardship activities are implemented reflecting local shared priorities
 - d)** To work together to:
 - Share relevant key partner information
 - improving communication and data sharing
 - identify early opportunities to coordinate activities
 - reduce any barriers to multiagency working
- 1.5** The composition and governance of the group has remained intentionally fluid; this deliberate approach is considered appropriate given the breadth and depth of the reforms planned. Core members of the group to date are representative of:
- Carlisle City Council (Portfolio Holder, Deputy CE, Housing, Welfare, Policy, Customer Contact and Benefits)

- Housing Associations (Riverside, Impact, Castles & Coast)
- Department for Work and Pensions
- Cumbria Law Centre
- Food Bank / Churches Together
- Citizens Advice Bureau
- Clinical Commissioning group

2. GROUP OBJECTIVES AND AGENDA

- 2.1** The group consistently monitors local data from all key partners and Cumbria Observatory, alongside key national trends and local case studies. This sharing of non-personalised information has proved very effective at identifying pressure points in the assessment and payments systems across the partnership which has led to a more joined up and consistent understanding of the processes.
- 2.2** The group is committed to ensuring there is an appropriate and effective local service response through:
- Sharing individual organisations good practice strategic and operational approaches to support people affected by welfare reforms
 - Working together to improve local service delivery to meet needs; support fair employment; professional practice and data sharing; sharing learning; training and shaping the future delivery of services
 - Researching best practice nationally and adopt good practice locally
 - Improving data sharing through the provision of local stats / data
- 2.4** Further to this work, since 2012 the group has delivered joint training, workshops, and public events; and is currently closely monitoring the impact of the cost-of-living pressures on vulnerable people.
- 2.5** Although continued to be hosted and supported by Carlisle City Council, the Chair of this group has recently been handed over to Shane Byrne from the Department of Work and Pensions. Shane will attend the People Scrutiny Panel meeting to give a verbal overview and presentation to members, on the groups focus for the next six months.

4. CONTRIBUTION TO THE CARLISLE PLAN PRIORITIES

4.1 The work of this Welfare Reform Board contributes to a range of our priorities but particularly relates to the focus on improving resident's quality of life.

Contact Officer: Tammie Rhodes Ext: 7217
Shane Byrne (DWP)

Appendices attached to report: Carlisle Welfare Reform Board Terms of Reference
None

Note: in compliance with section 100d of the Local Government (Access to Information) Act 1985 the report has been prepared in part from the following papers:

- None

Carlisle Welfare Reform Board Terms of Reference

Purpose: To provide an effective coordinated partnership response to welfare reform across Carlisle and district

Objectives:

1. Identify gaps in local services; and drive actions required to close gaps
2. Monitor the cumulative impact of welfare reform and use this information to inform co-ordinated action planning
3. Ensure that planned and co-ordinated welfare reform actions are implemented reflecting local priorities

Group members will commit to:

- a) Sign up to a local welfare reform commitment and achieving shared actions / priorities through the terms of reference
- b) Share individual organisations good practice strategic and operational approaches to support people affected by welfare reforms
- c) Work together to improve local service delivery to meet needs; support fair employment; professional practice and data sharing; sharing learning; training and shaping the future delivery of services
- d) Research best practice nationally and adopt good practice locally
- e) Improve data sharing to support priorities set, through the provision of local stats / data; exploring and implementing mechanisms such as:
 - Share point platform
 - Information sharing protocol

Meetings:

- All meetings will be chaired by a representative officer of Carlisle City Council
- Decisions made by consensus
- Meeting agendas and minutes will be provided by Carlisle City Council, this includes:
 - Preparing agendas and supporting papers
 - Preparing meeting notes and information
- Meetings will be held quarterly at the Civic Centre in Carlisle
- The terms of reference will be reviewed annually

Meeting Date:	6 October 2022
Portfolio:	Finance, Governance and Resources
Key Decision:	No
Policy and Budget Framework	Yes
Public / Private	Public
Title:	Revenue Budget Overview & Monitoring Report: April to June 2022
Report of:	Corporate Director of Finance and Resources
Report Number:	RD.31/22

Purpose / Summary:

This report provides an overview of the Council's General Fund revenue budgetary position for the period April to June 2022 which was considered by the Executive on 30 August 2022.

Questions for / input required from Scrutiny:

Members are asked to scrutinise the variances contained within this report.

Recommendations:

Members of the People Panel are asked to scrutinise the overall budgetary position for the period April to June 2022.

Tracking

Executive:	30 August 2022
Scrutiny:	6 October 2022 (People Panel)
Council:	n/a

Carlisle City Council

Report to Executive

Meeting Date:	30 August 2022
Portfolio:	Finance, Governance and Resources
Key Decision:	No
Policy and Budget Framework	Yes
Public / Private	Public
Title:	Revenue Budget Overview & Monitoring Report: April to June 2022
Report of:	Corporate Director of Finance and Resources
Report Number:	RD 31/22

Purpose / Summary:

This report provides an overview of the Council's overall budgetary position for the period April to June 2022 for revenue schemes only. The report also includes details of balance sheet management issues, bad debts written off in the period and progress against the budget savings is also provided.

Recommendations:

The Executive is asked to:

- (i) Note the budgetary performance position of the Council to June 2022;
- (ii) Note the action by the Corporate Director of Finance and Resources to write-off bad debts as detailed in paragraph 6;
- (iii) Note the release of reserves as set out in the table at paragraph 2.2, and note the virements approved as detailed in Appendix A.

Tracking

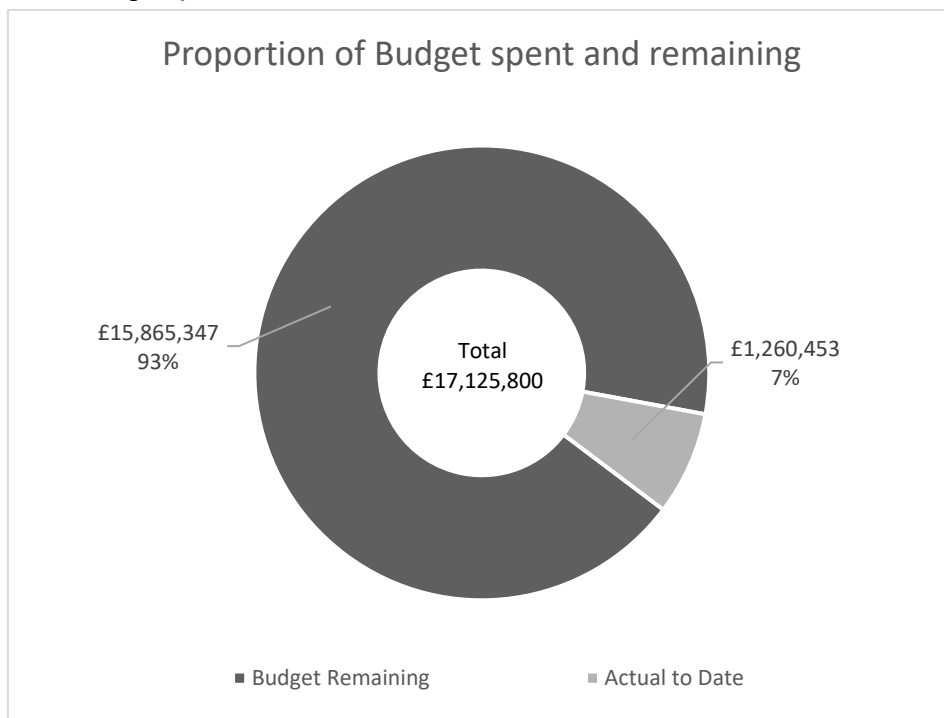
Executive:	30 August 2022
Scrutiny:	6 October 2022 (People Panel)
Council:	n/a

1. Background

- 1.1. In accordance with the City Council's Financial Procedure Rules, the Corporate Director of Finance and Resources is required to report to the Executive on the overall budget position, the monitoring and control of expenditure against budget allocations and the exercise of virement on a regular basis. Further details of virements processed can be found in **Appendix A**. It is the responsibility of individual Chief Officers to control income and expenditure within their service areas and to monitor performance, taking account of financial information provided by the Corporate Director of Finance and Resources.
- 1.2. All Managers currently receive a monthly budget monitoring report covering their areas of responsibility. Information is collated from the main accounting system and then adjusted to correct any known budget profiling trends, timing differences and commitments. The report has been developed in line with the need to provide sound financial management information to inform the decision-making process.
- 1.3. Please note that throughout this report:
- (i) the use of a bracket represents a favourable position i.e. either an underspend or additional income received,
 - (ii) the term 'underspend' is taken to include both reduced expenditure and/or increased income,
 - (iii) the term 'overspend' includes both spending above budget and/or shortfall in income.

2. 2022/23 Revenue Budget Monitoring

- 2.1 The budget position of the Council as at June 2022 is as follows:



2.2 The summarised revenue budgetary position as at June 2022 is shown in the following table:

		Original Budget £	Net Updated £	Net Budget to Date £	Net Spend to Date £	Variance £
Community Services	B1	11,263,900	11,611,200	1,839,670	1,693,139	(146,531)
Corporate Support	B2	143,600	209,200	477,065	482,984	5,919
Economic Development	B3	1,897,400	2,378,400	508,596	589,878	81,282
Finance & Resources	B4	2,859,600	2,820,100	(868,720)	(1,399,164)	(530,444)
Governance & Regulatory Services	B5	2,013,100	2,708,200	332,402	204,208	(128,194)
Corporate Management	B6	(3,474,000)	(3,510,900)	(209,384)	(373,696)	(164,312)
Service Expenditure		14,703,600	16,216,200	2,079,629	1,197,349	(882,280)
Exceptional Items	B7	215,400	909,600	171,153	63,104	(108,049)
Service Expenditure		14,919,000	17,125,800	2,250,782	1,260,453	(990,329)
Parish Precepts		731,500	731,500	731,500	731,304	(196)
Total		15,650,500	17,857,300	2,982,282	1,991,757	(990,525)
Transfers to/(from) Reserves						
Cremator Replacement Reserve		0	21,100			
Revenue Grants Reserve		0	(161,100)			
General Fund Reserve		166,100	(1,801,800)			
Planning Services Reserve		0	27,100			
Council Tax Income Reserve		0	(23,000)			
Carry Forward Reserve		0	(126,000)			
Operational Risk Reserve		(777,000)	(777,000)			
Total Transfer to/(from) Reserves		(610,900)	(2,840,700)	771,868	2,727,957	1,956,089
Financed by:						
Precept from Collection Fund		(8,663,000)	(8,640,000)	(2,160,000)	(2,165,753)	(5,753)
Revenue Support Grant		0	0	0	(143)	(143)
Business Rate Retention		(6,376,600)	(6,376,600)	(1,594,150)	(2,553,818)	(959,668)
Total Grants		(15,039,600)	(15,016,600)	(3,754,150)	(4,719,714)	(965,564)
Total		(15,650,500)	(17,857,300)	(2,982,282)	(1,991,757)	990,525

2.3 Further details for each directorate can be found in **Appendices B1 – B7**. Each appendix shows a breakdown of the variances for the Directorate, with comments and a note of any performance issues. Although the net position is shown in the table above, the main variances are summarised in the table below.

Budget Area		Underspend £	Overspend £
Car Parking Income (excl. contracts)	B1	0	62,679
Bereavement Services	B1	0	52,021
Recycling and Waste Management	B1	(214,756)	0
Development Control Income	B3	0	76,410
Loan Interest (incl. new borrowing)	B4	(193,327)	0
Minimum Revenue Provision	B4	(199,479)	0
Revenues and Benefits	B4	(128,152)	0
Industrial Estates	B5	(53,622)	0
Asset Review Income	B5	(39,850)	0
Homeless Accommodation	B5	0	50,064
Salary Turnover Savings	B6	(138,963)	0

2.4 Some of the significant service expenditure and income variances are set out below:

- A shortfall in car parking income from tickets, permits and PCNs.
- A net overspend on Bereavement Services due to reduced income from Cremation fees.
- A net underspend in Recycling and Waste Services due to increased income from plastic and card recycling, sale of recyclates, garden waste and Bring Sites.
- A decrease in Development Control fee income received.
- A saving from interest on borrowing due to no new borrowing scheduled for 2022/23 being entered into yet.
- A saving on Minimum Revenue Provision due to the year-end Capital Financing Requirement being lower than anticipated due to underspends and carry forwards in the 2021/22 capital programme.
- A net underspend in Revenues and Benefits mainly due to additional grant income received.
- Additional rental income from Industrial Estates.
- Additional income generated from completed rent reviews.
- An underspend of £15,126 on expenditure on Homeless Accommodation and a shortfall in income of £65,190. This is a direct result of Covid-19 as changes to occupancy and the available provision have had to be made to ensure the health and wellbeing of residents and staff. A budget pressure however was included in the 2022/23 budget to reflect this.
- Additional salary turnover achieved against the budget to date.

2.5 A subjective analysis of the summarised budgetary position excluding exceptional items as at June is shown in **Appendix C**.

2.6 As usual the Council's virement procedures will be utilised in 2022/23 to accommodate new areas of spend outwith the current base budgets which can be

funded from underspends, as highlighted within this monitoring report, thus avoiding the additional use of reserves, or pressures on future years budgets.

2.7 The following table provides a summary position of the income and expenditure within Exceptional Items:

		Original Budget £	Net Updated £	Net Budget to Date £	Net Spend to Date £	Variance £
Covid-19 Related Expenditure	B7	56,300	56,300	14,092	27,912	13,820
Covid-19 Specific Grants	B7	0	(8,900)	(81,690)	(81,631)	59
Local Government Reorganisation	B7	159,100	862,200	238,751	116,823	(121,928)
Total Exceptional Items		215,400	909,600	171,153	63,104	(108,049)

2.8 Further details for this directorate can be found in **Appendix B7**. The main variances are also summarised below.

- A net overspend position on Council related expenditure as a result of Covid-19.
- Any costs associated with Local Government Reorganisation should either be covered through the City Council's own budget approved or reimbursed from the Implementation Reserve.

3. Forecast Outturn Position 2022/23

3.1 The Council's financial position is affected by a number of external factors that have a financial impact during the course of the year and ultimately at the year end.

These include:

- The general effect of local economic activity on the Council's income streams e.g. car parking, tourism and leisure activities, and property rentals especially in relation to the retail sector and especially economic recovery following Covid-19.
- Fuel prices, energy costs and other inflationary issues.
- The effects of the housing market and property prices, especially with regard to income from land charges, rents and building and development control.
- The impact of the delay to the Fair Funding Review and Business Rates Retention Review.
- The impact of Covid-19 on Council's budgetary position.

3.2 The Council's financial position will continue to be closely monitored and the projected year end position will be reported more fully in a future monitoring report. It will be important to maintain a prudent approach to ensure a sustainable position for future years to avoid any significant variance at year end.

3.3 The areas of significant variance noted in this report have been scrutinised fully and incorporated into the 2022/23 budget process for Cumberland Council where the position is deemed to be recurring in nature.

4. Funding

4.1 The main sources of funding for the Council are Council Tax Income and Business Rates income. Council Tax income does not vary in year from the amounts set at the budget, as any variation in Council Tax income received is usually adjusted in the Collection Fund Surplus/Deficit calculation for the following year's budget. However, the DLUHC announced a 3-year deficit recovery period for any arrears as at 31st March 2021.

4.2 Business Rates Income is largely prescribed by the amounts submitted to DLUHC on the NNDR1 form which estimates Business Rate Income for the year when calculated in January, however, there are two elements of this income that can vary throughout the year, namely, section 31 grants paid by government for business rates reliefs granted, and the levy and pooling calculations to the Cumbria Pool.

4.3 The current estimates of Business Rates income for the quarter to the end of June are shown in **Appendix D**.

The figures show that based on the first quarter the Council may receive an extra £959,668 in business rates income over and above what it has budgeted for. However, it is anticipated that this position could change significantly throughout the year depending upon the performance of other authorities in the Cumbria Pool and the amount of reliefs granted during the year that are subject to Section 31 Grant reimbursement and an updated position will be reported later in the year. A 3-year deficit period was permitted for any Collection Fund deficits as at 31 March 2021 in accordance with the funding package provided by DLUHC.

The previous 2-years saw government provide rating support to the retail leisure and hospitality sectors as a response to the COVID-19 pandemic. This resulted in larger deficits on the collection fund, however, for 2022/23 there is no such support so there should be no exceptional deficits on the collection fund and any surpluses or deficits reported at the end of the year will be as a result of actual collection rates.

5. Balance Sheet Management

5.1 In line with CIPFA guidance and good practice, information relating to significant items on the Council's balance sheet is shown below. The information concentrates on those items that may have a material impact on the Council if not reviewed on a regular basis.

Balance Sheet item	Balance at 31/03/2022	Balance at Jun 2022	Note
Investments	£25.87m	£29.83m	(i)
Loans	£12.83m	£12.83m	(ii)
Debtors System	£1.74m	£1.20m	(iii)
Creditors System	£0.007m	£0.403m	

- (i) The anticipated annual return on these investments is estimated at £198,200 for 2022/23 with current forecasts anticipated to be slightly above these projections. Further details on the overall Treasury Management performance can be found elsewhere on the agenda.
- (ii) The cost of managing this debt (including any new debt budgeted for from 2022/23 onwards), in terms of interest payable, is budgeted at £980,500 in 2022/23 with costs currently showing a saving against budget due to new borrowing not entered into yet.
- (iii) There may be a significant impact on the cash flow of the Council if outstanding debts are not received. Any debts deemed to be irrecoverable are written off against a bad debt provision set up specifically for this purpose. Other significant debts relate to Council Tax, NNDR, and Housing Benefit overpayments.
- (iv) The Council's VAT partial exemption calculation for the period ending June 2022 is currently 1.67%, well below the 5% limit.

6. Bad Debt Write-Offs

- 6.1 The Corporate Director of Finance and Resources has delegated authority for the write-off of outstanding debts for NNDR, Council Tax and Debtors (including Penalty Charge Notices). In accordance with this, the Executive is asked to note that debts totalling £95,239.10 have been written off during Quarter 1 to the end of June 2022. A summary of bad debts is given in Table 1 in **Appendix E** of this report and these costs will fall against the following:

	£
General Fund	15,208.79
Council Tax (Collection Fund)	74,563.05
NNDR	5,467.26
Total Write-offs	95,239.10

6.2 The “write-ons” itemised in Table 2 in **Appendix E**, totalling £11,853.94 are in respect of balances originally written off that have since been paid. The write-ons will be credited as follows:

	£
General Fund	14.95
Council Tax (Collection Fund)	10,925.86
NNDR	913.13
Total Write-ons	11,853.94

6.3 In the case of the General Fund, the write-offs will be charged against provisions for bad debts. However, VAT, which has been identified separately, will be recouped in future VAT returns. Any write-off/write-on of Council Tax/NNDR will fall against the provisions within the Collection Fund. Any Council Tax court costs written off will be charged against the Bad Debt Provision within the General Fund.

6.4 The level of outstanding debt has increased during the pandemic and although a ‘soft’ debt recovery process was initially agreed whereby letters were issued asking debtors to contact the Council to discuss flexible repayment terms, and a signpost to the CTRS scheme for council taxpayers, the formal debt recovery procedures are now in place in order to safeguard the Council’s cash position.

7. Risks

7.1 The ongoing impact of issues identified will be monitored carefully in budget monitoring reports and appropriate action taken.

7.2 The main risk to the Council is the impact of energy and other cost of living inflationary pressures and also any on-going impact of COVID-19 in terms of additional costs and shortfalls of income.

8. Consultation

8.1 Consultation to date.

SMT and JMT have considered the issues raised in this report.

8.2 Consultation Proposed

People Panel will consider the report on 6 October 2022.

9. Conclusion and reasons for recommendations

9.1 The Executive is asked to:

- (i) Note the budgetary performance position of the Council to June 2022;
- (ii) Note the action by the Corporate Director of Finance and Resources to write-off bad debts as detailed in paragraph 6;

- (iii) Note the release of reserves as set out in the table at paragraph 2.2, and note the virements approved as detailed in Appendix A.

10. Contribution to the Carlisle Plan Priorities

10.1 The Council's revenue budget is set in accordance with the priorities of the Carlisle Plan and the position for the third quarter of 2022/23 shows the delivery of these priorities within budget.

Contact details:

Contact Officer: Emma Gillespie Ext: 7289

Appendices attached to report:

- A, B1 to B7, C to E

Note: in compliance with section 100d of the Local Government Act 1972 the report has been prepared in part from the following papers:

- None

Corporate Implications:

Legal - The Council has a fiduciary duty to manage its finances properly and the proper reporting of the budget monitoring is part of this process.

Property Services - Property asset implications are contained within the main body of the report.

Finance - Financial implications are contained within the main body of the report.

Equality - This report raises no explicit issues relating to the public sector Equality Duty.

Information Governance - There are no information governance implications.

REVENUE BUDGET MONITORING 2022/23

VIREMENTS PROCESSED FOR PERIOD APRIL TO JUNE 2022

Date	Virement Details	Recurring/ Non-recurring	Value	Authorised By
Requested by Officers (under £35,000 or delegated authority)				
09/05/2022	Release of Council Tax Income Guarantee to offset the deficit on the Collection Fund as a result of loss of Council Tax income in 2020/21 due to the Covid-19 pandemic	Non-recurring	23,000	OD.58/22 Corporate Director of Finance and Resources
07/06/2022 & 08/07/2022	Release of funding from Revenue Grant Reserve for Partnerships Place Co-ordinator	Non-recurring	9,300	Corporate Director of Finance and Resources
07/06/2022	Release of funding from Revenue Grant Reserve for Sustainable Food City Co-ordinator	Non-recurring	6,000	Corporate Director of Finance and Resources
07/06/2022 & 04/07/2022	Release of funding from Revenue Grant Reserve for One Public Estate	Non-recurring	16,100	Corporate Director of Finance and Resources
07/06/2022 & 08/07/2022	Release of funding from Revenue Grant Reserve for St Cuthbert's Garden Village	Non-recurring	135,100	Corporate Director of Finance and Resources
16/05/2022	Release of Carry Forward Reserve in respect of phase 1 site investigation work on land at Grearhill	Non-recurring	60,000	OD.64/22 Corporate Director of Finance and Resources
16/05/2022	Release of Carry Forward Reserve in respect of phase 1 site investigation work on land at Morton	Non-recurring	60,000	OD.65/22 Corporate Director of Finance and Resources
08/07/2022	Release of funding from Revenue Grant Reserve for Gas Safety Measures	Non-recurring	600	Corporate Director of Finance and Resources
Approved by Executive (£35,000 to £70,000 or delegated authority)				
21/02/2022	Additional non-recurring funding provided to support mental health provision in Carlisle and the continuation of the existing environmental clean-up and enforcement scheme.	Non-recurring	100,000	Executive RD.75/21
Approved by Council (over £70,000)				
19/07/2022	Revenue Carry Forwards from 2021/22 into 2022/23	Non-recurring	1,967,900	Council RD.23/22

REVENUE BUDGET MONITORING 2022/23

COMMUNITY SERVICES	Gross Expenditure	Gross Income	Recharges	Total
Position as at 30 June 2022	£	£	£	£
Annual Budget	20,648,000	(5,305,000)	(3,731,800)	11,611,200
Budget to date	4,414,474	(1,513,975)	(1,060,829)	1,839,670
Total Actual	4,500,686	(1,754,688)	(1,052,859)	1,693,139
Variance	86,212	(240,713)	7,970	(146,531)
Carry Forwards/Reserves & Provisions				0
Adjusted Variance	86,212	(240,713)	7,970	(146,531)

Analysis of Variances		Expenditure Variance	Income Variance	Recharges Variance	Adjusted Variance
Service	Note	£	£	£	£
Car Parking	1	20,354	51,390	43	71,787
Bereavement Services	2	18,047	33,878	96	52,021
Healthy Cities	3	(43,413)	(8,714)	0	(52,127)
Other Green Spaces	4	33,271	(53,887)	62	(20,554)
Recycling and Waste Services	5	44,160	(256,695)	(2,220)	(214,756)
Miscellaneous	6	13,794	(6,686)	9,989	17,097
Total Variance to date		86,212	(240,713)	7,970	(146,531)

Note	Community Services - Comments
1.	Various minor overspends including budget savings to be found; Shortfall in ticket income, contract income and penalty charge notice income.
2.	Overspends on premises related costs; reduced income from cremation fees partly offset by increased income from Cemeteries fees.
3.	Underspends in relation to Leisure contract payments and Old Fire Station.
4.	Increased car parking income at Talkin Tarn County Park & sales of meals and refreshments at Boathouse Tearoom.
5.	Overspend on employee and transport costs. Surplus income from Plastic and Card recycling, Garden Waste, Sale of recyclates and Bring Sites income.
6.	Minor overspends, increased income and reduced trading income (recharges) across other services within the Directorate.

REVENUE BUDGET MONITORING 2022/23

CORPORATE SUPPORT	Gross Expenditure	Gross Income	Recharges	Adjusted Total
Position as at 30 June 2022	£	£	£	£
Annual Budget	3,972,100	(307,500)	(3,455,400)	209,200
Budget to date	1,542,891	(200,949)	(864,877)	477,065
Total Actual	1,527,903	(180,982)	(863,937)	482,984
Variance	(14,988)	19,967	940	5,919
Carry Forwards/Reserves & Provisions				0
Adjusted Variance	(14,988)	19,967	940	5,919

Analysis of Variances		Expenditure Variance	Income Variance	Recharges Variance	Adjusted Variance
Service	Note	£	£	£	£
Customer Contact	1	(13,823)	20,042	272	6,490
Miscellaneous	2	(1,165)	(75)	668	(571)
Total Variance to date		(14,988)	19,967	940	5,919

Note	Corporate Support - Comments
1.	Underspends on employee related costs, shortfall in reception service fee income.
2.	Minor underspends and additional income across other services within the Directorate.

REVENUE BUDGET MONITORING 2022/23

ECONOMIC DEVELOPMENT	Gross Expenditure	Gross Income	Recharges	Adjusted Total
Position as at 30 June 2022	£	£	£	£
Annual Budget	3,867,400	(1,072,600)	(416,400)	2,378,400
Budget to date	927,254	(314,432)	(104,226)	508,596
Total Actual	954,145	(260,167)	(104,100)	589,878
Variance	26,891	54,265	126	81,282
Carry Forwards/Reserves & Provisions				0
Adjusted Variance	26,891	54,265	126	81,282

Analysis of Variances		Expenditure Variance	Income Variance	Recharges Variance	Adjusted Variance
Service	Note	£	£	£	£
Development Control	1	17,325	76,410	0	93,735
Miscellaneous	2	9,566	(22,145)	126	(12,453)
Total Variance to date		26,891	54,265	126	81,282

Note	Economic Development - Comments
1.	Overspend on employee related costs; shortfall in fee income received.
2.	Minor overspends and increased income across other services within the Directorate.

REVENUE BUDGET MONITORING 2022/23

FINANCE AND RESOURCES	Gross Expenditure	Gross Income	Recharges	Adjusted Total
Position as at 30 June 2022	£	£	£	£
Annual Budget	32,618,300	(26,908,700)	(2,889,500)	2,820,100
Budget to date	12,477,026	(12,833,327)	(512,419)	(868,720)
Total Actual	12,076,608	(12,963,972)	(511,800)	(1,399,164)
Variance	(400,418)	(130,645)	619	(530,444)
Carry Forwards/Reserves & Provisions				0
Adjusted Variance	(400,418)	(130,645)	619	(530,444)

Analysis of Variances		Expenditure Variance	Income Variance	Recharges Variance	Adjusted Variance
Service	Note	£	£	£	£
Treasury and Debt Management	1	(391,681)	(20,772)	0	(412,453)
Revenues and Benefits	2	(18,440)	(109,837)	126	(128,152)
Miscellaneous	3	9,703	(35)	493	10,161
Total Variance to date		(400,418)	(130,645)	619	(530,444)

Note	Finance and Resources - Comments
1.	Saving on borrowing costs due to no new borrowing arrangements entered into yet & savings on Minimum Revenue Provision; improved levels of investment interest achieved.
2.	Various minor underspends; Increased level of Government Grants received.
3.	Minor overspends and increased income across other services within the Directorate.

REVENUE BUDGET MONITORING 2022/23

GOVERNANCE AND REGULATORY	Gross Expenditure	Gross Income	Recharges	Adjusted Total
Position as at 30 June 2022	£	£	£	£
Annual Budget	12,452,900	(5,919,900)	(3,824,800)	2,708,200
Budget to date	3,324,506	(2,034,803)	(957,301)	332,402
Total Actual	3,265,002	(2,111,903)	(948,891)	204,208
Variance	(59,504)	(77,100)	8,410	(128,194)
Carry Forwards/Reserves & Provisions				0
Adjusted Variance	(59,504)	(77,100)	8,410	(128,194)

Analysis of Variances		Expenditure Variance	Income Variance	Recharges Variance	Adjusted Variance
Service	Note	£	£	£	£
Industrial Estates	1	24,449	(78,071)	0	(53,622)
Strategic Asset Investment	2	(38,676)	(4,242)	140	(42,778)
Homeless Accommodation	3	(15,126)	65,190	0	50,064
Miscellaneous	4	(30,151)	(59,977)	8,270	(81,858)
Total Variance to date		(59,504)	(77,100)	8,410	(128,194)

Note	Governance & Regulatory Services - Comments
1.	Overspend on third party payments; increased rental income as a result of backdated rent reviews.
2.	Additional income generated from completed rent reviews; increased level of valuation fees received.
3.	Underspend on employee related expenditure and supplies and services, overspend on premises expenditure; shortfall in income as a direct result of Covid-19 as changes to occupancy levels and the available provision have had to be made to ensure the health and wellbeing of residents and staff.
4.	Minor underspends and increased income across other services within the Directorate.

REVENUE BUDGET MONITORING 2022/23

CORPORATE MANAGEMENT	Gross Expenditure	Gross Income	Recharges	Adjusted Total
Position as at 30 June 2022	£	£	£	£
Annual Budget	(1,541,200)	(1,969,700)	0	(3,510,900)
Budget to date	234,893	(444,277)	0	(209,384)
Total Actual	69,805	(443,501)	0	(373,696)
Variance	(165,088)	776	0	(164,312)
Carry Forwards/Reserves & Provisions				0
Adjusted Variance	(165,088)	776	0	(164,312)

Analysis of Variances		Expenditure Variance	Income Variance	Recharges Variance	Adjusted Variance
Service	Note	£	£	£	£
Other Financial Costs	1	(178,419)	775	0	(177,644)
Miscellaneous	2	13,331	1	0	13,332
Total Variance to date		(165,088)	776	0	(164,312)

Note	Corporate Management - Comments
1.	Improvements in savings for Salary Turnover (£138,963) and additional savings found (£38,800).
2.	Minor overspends across other services within the Directorate.

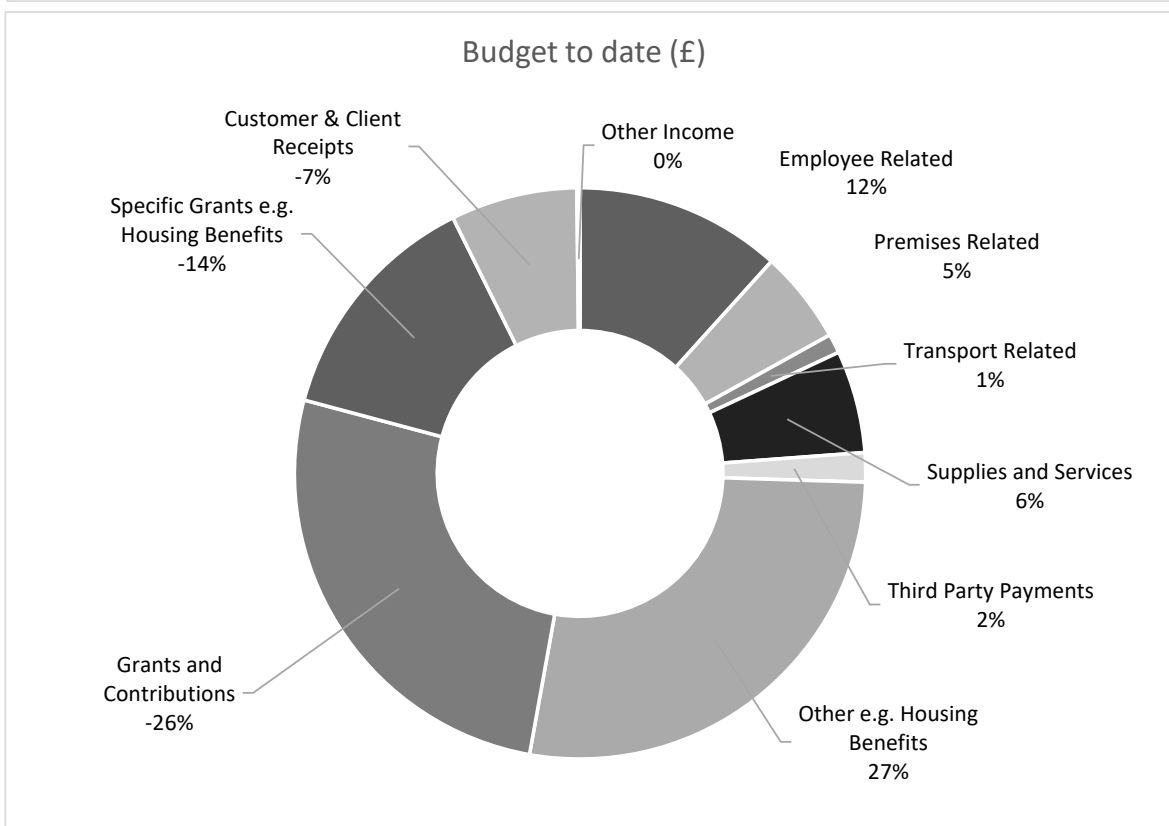
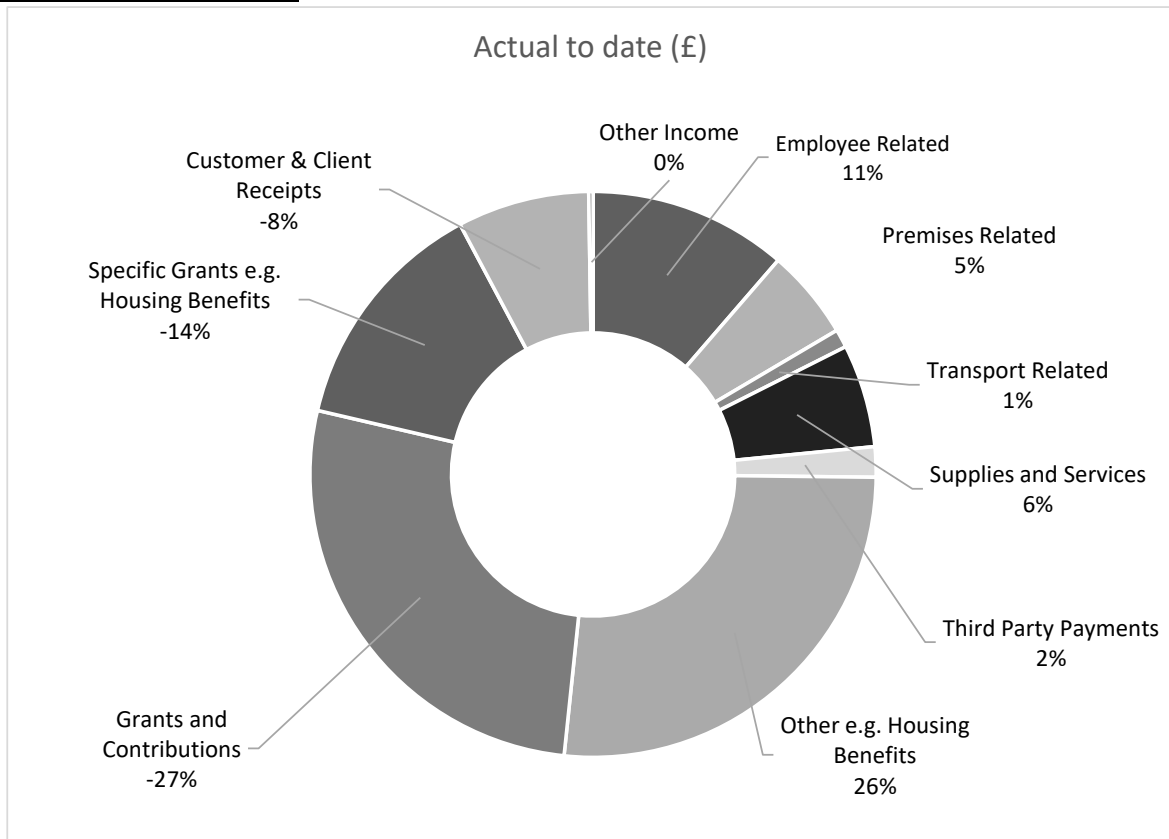
REVENUE BUDGET MONITORING 2022/23

EXCEPTIONAL ITEMS	Gross Expenditure	Gross Income	Recharges	Adjusted Total
Position as at 30 June 2022	£	£	£	£
Annual Budget	1,035,100	(125,500)	0	909,600
Budget to date	296,653	(125,500)	0	171,153
Total Actual	191,604	(128,500)	0	63,104
Variance	(105,049)	(3,000)	0	(108,049)
Carry Forwards/Reserves & Provisions				0
Adjusted Variance	(105,049)	(3,000)	0	(108,049)

Analysis of Variances		Expenditure Variance	Income Variance	Recharges Variance	Adjusted Variance
Service	Note	£	£	£	£
Covid-19 Related Expenditure & Grants	1	16,879	(3,000)	0	13,879
Local Government Reorganisation	2	(121,928)	0	0	(121,928)
Total Variance to date		(105,049)	(3,000)	0	(108,049)

Note	Exceptional Items - Comments
1.	A net overspend position on Council related expenditure as a result of Covid-19.
2.	A net underspend position on Local Government Reorganisation expenditure. The balance will be required to support the ongoing process.

SUBJECTIVE ANALYSIS



BUSINESS RATES INCOME

	2021/22 Outturn	2022/23 NNDR1	2022/23 Q1
Local Share of Income (Per NNDR1)	(17,415,961)	(16,489,930)	(16,489,930)
Renewables (Per NNDR1)	(378,052)	(412,335)	(412,335)
Renewables Bfwd (NNDR3 Previous Year)	4,122	0	0
Enterprise Zone (Per NNDR1)	(418,227)	(225,003)	(225,003)
Tariff (Per Final Settlement)	12,569,244	12,568,847	12,568,847
Section 31 Grants (reimbursement of funded reliefs)			
Section 31 Grants (Flooding)	(5,055,072)	(3,206,585)	(3,394,817)
Section 31 Grant Expanded Retail Discount, Nursery and Local Newspaper			
Estimated Collection Fund Deficit/(Surplus) per NNDR1	9,462,618	2,958,134	2,958,134
Spreading of Deficit	0	197,036	197,036
Levy Payable to Pool	1,349,235	1,660,000	1,430,000
Pool Redistribution	(700,000)	(940,000)	(813,000)
Total Income	(582,093)	(3,889,836)	(4,181,068)
Budget			
Section 31 Grant B/Fwd (Earmarked Reserve)	9,462,618	3,155,200	3,155,200
Baseline Funding	(3,335,200)	(3,335,700)	(3,335,700)
Business Rates Multiplier Grant	(173,800)	(340,900)	(340,900)
Additional Rates Income - Pooling/Growth	(2,700,000)	(2,700,000)	(2,700,000)
Total Budget	3,253,618	(3,221,400)	(3,221,400)
Additional Income retained	(3,835,711)	(668,436)	(959,668)

BAD DEBT PROVISION

TABLE 1 Type of Debt	Write-Offs June 2022		Comments
	No.	£	
NNDR (General)	4	5,467.26	01/04/22 to 30/06/22
Council Tax	63	74,563.05	01/04/22 to 30/06/22
Debtors:			
Private Tenants	0	0.00	01/04/22 to 30/06/22
Housing Benefit Overpayments	17	6,977.48	01/04/22 to 30/06/22
General Fund	15	8,231.31	01/04/22 to 30/06/22
Penalty Charge Notices:			
On Street	0	0.00	01/04/22 to 30/06/22
Off Street	0	0.00	01/04/22 to 30/06/22
TOTAL	99	95,239.10	

TABLE 2 Type of Debt	Write-Ons June 2022		Comments
	No.	£	
NNDR (General)	6	913.13	01/04/22 to 30/06/22
Council Tax	18	10,925.86	01/04/22 to 30/06/22
Debtors:			
Private Tenants	0	0.00	01/04/22 to 30/06/22
Housing Benefit Overpayments	1	13.01	01/04/22 to 30/06/22
General Fund	6	1.94	01/04/22 to 30/06/22
TOTAL	31	11,853.94	

EXCERPT FROM THE MINUTES OF THE EXECUTIVE HELD ON 30 AUGUST 2022

EX.112/22 REVENUE BUDGET OVERVIEW & MONITORING REPORT - APRIL TO JUNE 2022

(Non Key Decision)

Portfolio Finance, Governance and Resources

Relevant Scrutiny Panel People Panel

Subject Matter:

The Leader submitted report RD.31/22 the purpose of which was to provide an overview of the Council's overall budgetary position for the period April to June 2022 for revenue schemes only.

The Leader highlighted, in particular, some of the significant service expenditure and income variances identified at paragraph 2.4. Section 3 recorded that the Council's financial position was affected by a number of external factors which would have a financial impact during the course of the year and ultimately at the year-end. The Council's financial position would continue to be closely monitored and the likely year end position would be reported more fully in a future monitoring report. It would be important to maintain a prudent approach so as to ensure a sustainable position for future years and to avoid any significant variance at the year end.

In conclusion, the Leader moved the recommendations set out in the report, which were seconded by the Communities, Health and Wellbeing Portfolio Holder.

Summary of Options rejected none

DECISION

That the Executive:

- (i) noted the budgetary performance position of the Council to June 2022;
- (ii) noted the action by the Corporate Director of Finance and Resources to write-off bad debts as detailed in paragraph 6 of Report RD.31/22;
- (iii) noted the release of reserves as set out in the table at paragraph 2.2, and noted the virements approved as detailed in Appendix A of Report RD.31/22.

Reasons for Decision

To show that the Executive had been informed of the Council's actual financial position compared with the budgeted position and to bring to their attention any areas of concern

Carlisle City Council Report to People Panel

Item
A.5

Meeting Date: 6 October 2022
 Portfolio: Finance, Governance and Resources
 Key Decision: No
 Policy and Budget Framework: Yes
 Public / Private: Public

Title: Capital Budget Overview & Monitoring Report: April to June 2022
 Report of: Corporate Director of Finance and Resources
 Report Number: RD.32/22

Purpose / Summary:

This report provides an overview of the budgetary position of the Council’s capital programme for the period April to June 2022 which was considered by the Executive on 30 August 2022.

Questions for / input required from Scrutiny:

Members are asked to scrutinise the variances contained within this report.

Recommendations:

Members of the Business & Transformation Scrutiny panel are asked to scrutinise the overall budgetary position for the period April to June 2022.

Tracking

Executive:	30 August 2022
Scrutiny:	6 October 2022 (People Panel)
Council:	n/a

Carlisle City Council

Report to Executive

Meeting Date: 30 August 2022
 Portfolio: Finance, Governance and Resources
 Key Decision: No
 Policy and Budget Framework: Yes
 Public / Private: Public

Title: Capital Budget Overview & Monitoring Report: April to June 2022
 Report of: Corporate Director of Finance and Resources
 Report Number: RD32/22

Purpose / Summary:

This report provides an overview of the Council’s overall budgetary position for the period April to June 2022 for the Council’s capital programme.

Recommendations:

The Executive is asked to:

- (i) Note and comment on the budgetary position and performance aspects of the capital programme for the period April to June 2022;
- (ii) Note the adjustments to the 2022/23 capital programme as detailed in paragraph 2.1.

Tracking

Executive:	30 August 2022
Scrutiny:	6 October 2022 (People Panel)
Council:	n/a

1. Background

- 1.1. In accordance with the City Council's Financial Procedure Rules, the Corporate Director of Finance and Resources is required to report to the Executive on the overall budget position, the monitoring and control of expenditure against budget allocations and the exercise of virement on a regular basis. It is the responsibility of individual Chief Officers to control income and expenditure within their service areas and to monitor performance, taking account of financial information provided by the Corporate Director of Finance and Resources.
- 1.2. All Managers receive a monthly budget monitoring report covering their areas of responsibility. Information is collated from the main accounting system and then adjusted to correct any known budget profiling trends, timing differences and commitments. The report has been developed in line with the need to provide sound financial management information to inform the decision-making process.
- 1.3. Please note that throughout this report:
 - (i) the use of a bracket represents a favourable position i.e. either an underspend or additional income received,
 - (ii) the term 'underspend' is taken to include both reduced expenditure and/or increased income,
 - (iii) the term 'overspend' includes both spending above budget and/or shortfall in income.
- 1.4. It is important to understand the distinction between capital and revenue expenditure.

The general rule is that all expenditure must be treated as revenue expenditure unless it meets strict criteria allowing it to be treated as capital expenditure.

Capital expenditure is for fixed assets such as acquisition of land and buildings, construction, conversion or enhancement of existing buildings, or the purchase of new technology, vehicles, plant, machinery or equipment that yields benefits to the Council and the services it provides for more than one year.

Revenue expenditure is for the day to day running costs of providing Council services such as staff costs, premises, transport, and goods and services used in the delivery of services.

2. Capital Budget Overview

- 2.1 The following statement shows the annual capital programme for 2022/23:

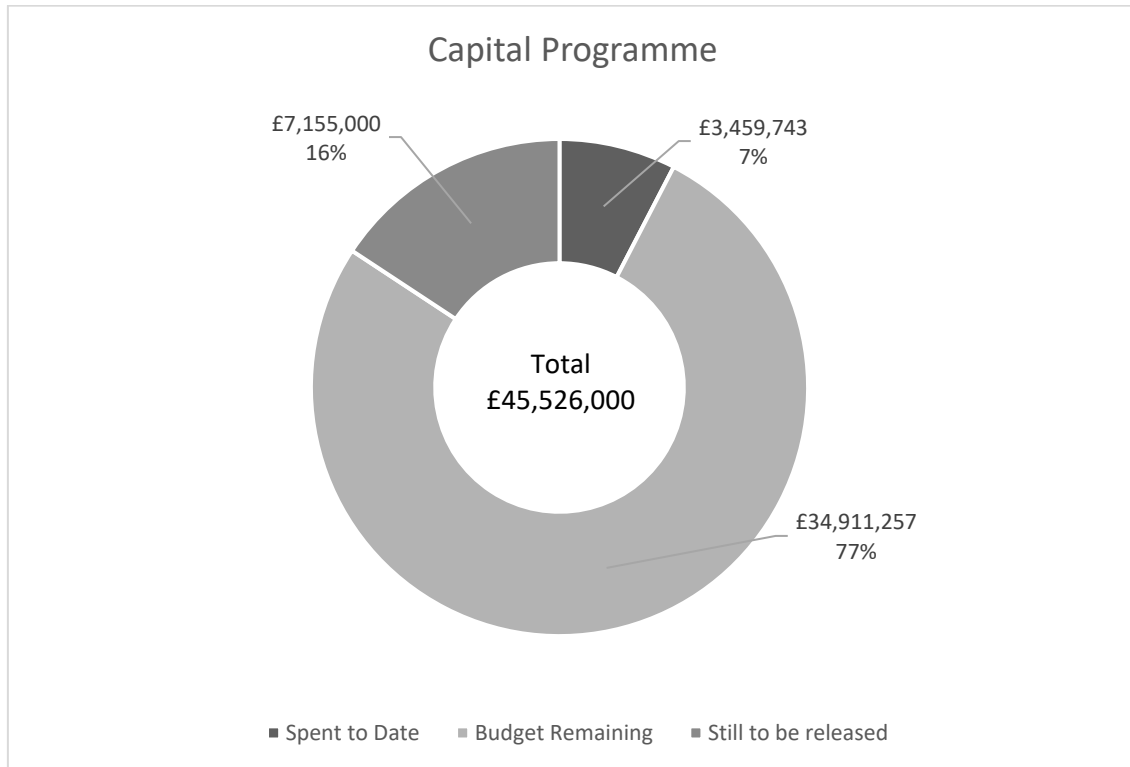
2022/23 Capital Budget	£
Original 2022/23 Programme (approved Feb 2022)	36,074,100
Carry forwards from 2021/22 (RD77/21 Council 01/03/22)	4,295,300
Carry forwards from 2021/22 (RD24/22 Council 19/07/22)	7,106,700
Reprofiling of Future High Street Projects (RD24/22 Council 19/07/22)	(2,284,500)
Additional Disabled Facilities Grant (RD16/21 Council 20/07/21)	255,800
2022/23 Capital Programme (RD24/22 Council 19/07/22)	45,447,400
Increase from S106 contributions towards Play Area Improvements (OD56/22 & OD57/22)	64,200
Increase from S106 contributions towards CCTV equipment (OD54/22)	1,900
Revenue Contribution towards the purchase of Waste Receptacles	12,500
Revised 2022/23 Capital Programme (at Jun 2022)	45,526,000
Less Capital Reserves to be released by Executive (see para 3.9)	(7,155,000)
Revised 2022/23 Capital Programme (released)	38,371,000

2.2 A breakdown of the revised capital programme can be found in **Appendix A**.

3. 2022/23 Budget Monitoring

3.1 The position as at June 2022 can be summarised as follows:

Directorate	Revised Annual Budget	Budget to Date	Spend to date	Variance to date	Para. Ref.
	£	£	£	£	
Community Services	9,280,100	2,921,991	2,935,726	13,735	3.3
Corporate Support	494,000	4,226	4,459	233	3.4
Economic Development	4,177,600	44,963	44,953	(10)	3.5
Finance and Resources	43,500	0	0	0	3.6
Governance & Regulatory Services	24,375,800	739,462	474,605	(264,857)	3.7
Total	38,371,000	3,710,642	3,459,743	(250,899)	
Reserves to be released	7,155,000	0	0	0	3.9
Total	45,526,000	3,710,642	3,459,743	(250,899)	



Schemes still to be released by the Executive are outwith the budget monitoring process until the budgets have been released.

A detailed analysis of the schemes within each directorate can be found in **Appendices B to F** with the main issues being summarised in the paragraphs below.

- 3.2 As at the end of June, expenditure of £3,459,743 has been incurred on the Council's core capital programme. When considered against the profiled budget of £3,710,642 this equates to an underspend of £250,899.
- 3.3 The variance in Community Services relates an overspend of £10,252 on Civic Centre Developments. Bitts Park Improvements. This position is currently being reviewed.
- 3.4 There are no significant variances to report in Corporate Support.
- 3.5 There are no significant variances to report in Economic Development.
- 3.6 There are no significant variances to report in Finance and Resources.
- 3.7 The variance in Governance & Regulatory Services is attributable to an underspend of £261,161 on Disabled Facilities Grants. Spend in the first quarter of 2022/23 was

£444,817 which is consistent with the first half of 2021/22 (£428,974). The position is being closely monitored.

3.8 The unspent balance remaining of the revised annual budget of £38,371,000 is £34,911,257. A review of the 2022/23 capital programme will be undertaken to identify accurate project profiles for the remainder of the financial year and any potential slippage into future years.

3.9 A number of schemes are included in the capital programme for 2022/23 that require a report to be presented to the Executive for the release of funding before the project can go ahead.

Scheme	Budget £	Note
Cemetery Infrastructure	30,000	
Crematorium Infrastructure	2,125,000	
Carlisle Southern Link Road	5,000,000	
Total	7,155,000	

4. Financing

4.1 The 2022/23 capital programme can be financed as follows:

	Annual Budget £	Current Programme £
Total Programme to be financed (para 2.1)	45,526,000	38,371,000
<u>Financed by:</u>		
Capital Receipts / Borrowing	285,500	285,500
Receipts Used to fund resources	(112,000)	(112,000)
Borrowing Requirement (in year)	16,256,100	10,426,100
Capital Grants		
• Disabled Facilities Grant	2,155,600	2,155,600
• Sustainable Warmth Grant	19,955,000	19,955,000
• Future High Street Fund	2,780,200	2,780,200
• General	933,700	933,700
Direct Revenue Financing	2,377,500	1,052,500
Other Contributions	894,400	894,400
Total Financing	45,526,000	38,371,000

5. Capital Resources

5.1 The following table shows the position as at June 2022 of capital resources due to be received during 2022/23:

	Annual Budget £	Actual £	Variance £	Note
Capital Receipts				
· Asset Review	(285,500)	0	285,500	1
· Used to fund resources	112,000	0	(112,000)	1
· Vehicle Sales	0	(20,191)	(20,191)	2
· Renovation Grants Repaid	0	(10,000)	(10,000)	2
Capital Grants				3
· Disabled Facilities Grant	(2,155,600)	(2,155,574)	26	
· Future High Street Fund	(1,739,900)	(1,217,906)	521,994	
· Sands Centre	(200,000)	0	200,000	
Capital Contributions				4
· Section 106	(859,900)	(271,058)	588,842	
· Disabled Facilities Grants	0	(1,971)	(1,971)	
· General	(34,500)	(32,000)	2,500	
Total	(5,163,400)	(3,708,700)	1,454,700	

Notes:

1. Receipts for 2022/23 are anticipated to be received from asset review sales (£285,500).
2. Included within vehicle sales are receipts of £6,131 for individual vehicle sales that are below the de minimis for capital receipts. These will be transferred to revenue at the year end and will be used to fund the capital programme in line with the capital strategy.
3. Capital grants are generally received once associated capital expenditure has been incurred and the amounts then reclaimed from the sponsoring body.
4. Contributions from Section 106 agreements to Play Area Improvements/CCTV Equipment (£259,100) and Affordable Housing (£600,800).

6. Balance Sheet Management

6.1 In line with CIPFA guidance and best practice, information relating to significant capital items on the Council's balance sheet is provided in this section. The information concentrates on those items that may have a material impact on the Council if not reviewed on a regular basis and will ensure that the Council is using its resources effectively and that appropriate governance arrangements are in place around the use of Council assets and liabilities.

- 6.2 Fixed assets are revalued annually to ensure that an up to date value is held in the balance sheet. The revaluation programme is the responsibility of Property Services. It should be noted that some expenditure will be incurred during the course of the year which can be correctly classified as capital expenditure, but which will not increase the value of any of the Council's assets. This expenditure is written off to the revaluation reserve or through the Comprehensive Income and Expenditure Account as appropriate.
- 6.3 The value of fixed assets is a significant part of the balance sheet. In the 2021/22 accounts, fixed assets totalled £215million (2020/21 £191million). This represents 105% of the net current assets of the City Council.
- 6.4 Debtors
This relates to the amount of income due to the Council that has not yet been received. For capital items, this mainly relates to grants and contributions that the Council is able to claim towards funding capital expenditure. Generally capital debtors arise due to timing differences where a cut off point occurs (e.g. the financial year-end) and/or expenditure has been incurred in advance of making the grant claim. As at June 2022 debtors of £327,313 (£342,313 at 31 March 2022) were outstanding for capital grants, contributions and receipts.
- 6.5 Creditors
This is the amount of money due to be paid by the Council for goods and services received from its external customers and contractors. For capital schemes this also includes retentions i.e. the amount due to the contractor after a specified period (normally one year) following the completion of a project; this time is used to assess and correct any defects outstanding on the scheme. Amounts earmarked for retention as at June 2022 totalled £213,309 (£1,924,994 at 31 March 2022).
- 7. Performance**
- 7.1 The 2022/23 programme has been kept to a level that takes account of the Council's ability to deliver schemes with regard to capacity and available resources. Work is ongoing to continue to monitor the profiling of budgets, and these are adjusted to reflect progress in current capital schemes. It is likely that there will still be a requirement for some carry forwards at the year end due to further slippage and delays on projects. Members are reminded that budgets now totalling £7,155,000 are being held in reserves until approved by Executive for release.
- 7.2 The Senior Management Team will provide strategic overview and monitor the effectiveness of the overall programme of work in delivering the Council's priorities and objectives. Technical project support and quality assurance of business cases and associated project management activities will be managed by a Transformation

Sub-Group chaired by the Chief Executive. Decisions to proceed or otherwise with proposed projects will be made in the usual way in accordance with the Council decision making framework.

- 7.3 A review of all capital expenditure incurred is ongoing to ensure that the expenditure has been correctly allocated between revenue and capital schemes. This will facilitate the year end classification of assets.

8. Risks

- 8.1 Individual capital schemes have different risks involved. A risk assessment of the overall capital programme is included at **Appendix G**. The most significant risk to the Council is the overall impact of inflation in terms of increased costs.

9. Consultation

- 9.1 Consultation to date.
SMT and JMT have considered the issues raised in this report.
- 9.2 Consultation Proposed
People Panel will consider the report on 6 October 2022.

10. Conclusion and reasons for recommendations

- 10.1 The Executive is asked to:
- (i) Note and comment on the budgetary position and performance aspects of the capital programme for the period April to June 2022;
 - (ii) Note the adjustments to the 2022/23 capital programme as detailed in paragraph 2.1.

11. Contribution to the Carlisle Plan Priorities

- 11.1 The Council's capital programme supports the current priorities in the Carlisle Plan.

Contact Officer: Emma Gillespie Ext: 7289

Appendices attached to report:

- A to G

Note: in compliance with section 100d of the Local Government Act 1972 the report has been prepared in part from the following papers:

- None

Corporate Implications:

Legal - The Council has a fiduciary duty to manage its finances properly and the proper reporting of the budget monitoring is part of this process.

Property Services - Property asset implications are contained within the main body of the report.

Finance - Financial implications are contained within the main body of the report.

Equality - This report raises no explicit issues relating to the public sector Equality Duty.

Information Governance - There are no information governance implications.

Scheme	Original Capital Programme 2022/23 £	Carry Forwards from 2021/22 £	Carry Forwards from 2021/22 £	Updated Capital Programme 2022/23 £	Other Adjustments £	Revised Capital Programme 2022/23 £
Current non-recurring commitments						
Sands Centre Redevelopment	3,450,200	0	3,240,900	6,691,100	0	6,691,100
Future High Street Fund - Market Square	1,011,800	377,300	80,000	1,469,100	(390,000)	1,079,100
Future High Street Fund - 6-24 Castle Street	510,700	42,600	110,700	664,000	(170,200)	493,800
Future High Street Fund - Central Plaza	1,787,300	632,400	37,500	2,457,200	(1,669,700)	787,500
Future High Street Fund - Devonshire Street	220,900	33,600	40,000	294,500	(54,500)	240,000
Future High Street Fund - Delivery Costs	122,500	33,400	24,000	179,900	(100)	179,800
Play Area Improvements	250,000	0	205,500	455,500	64,200	519,700
Sands Car Park Resurfacing	210,000	0	0	210,000	0	210,000
Swifts Car Park Resurfacing	200,000	0	0	200,000	0	200,000
Sustainable Warmth Competition	17,745,000	2,210,000	0	19,955,000	0	19,955,000
Bits Park Public Realm	0	32,000	10,000	42,000	0	42,000
Energy Monitoring System	0	0	12,000	12,000	0	12,000
Cemetery Infrastructure	0	0	5,700	5,700	0	5,700
Planning Software	0	0	150,000	150,000	0	150,000
Towns Deal - Caldeu Riverside	0	0	646,600	646,600	0	646,600
Gateway 44	0	0	300,000	300,000	0	300,000
Rough Sleeping Initiative	0	0	4,800	4,800	0	4,800
Financials Upgrade	0	0	43,500	43,500	0	43,500
Affordable Homes	0	0	600,800	600,800	0	600,800
CCTV Equipment	0	0	0	0	1,900	1,900
	25,508,400	3,361,300	5,512,000	34,381,700	(2,218,400)	32,163,300
Recurring commitments						
Planned Enhancements to Council Property	250,000	80,000	127,700	457,700	0	457,700
Vehicles, Plant & Equipment	1,185,500	0	366,700	1,552,200	0	1,552,200
Recycling Containers	45,000	0	0	45,000	12,500	57,500
ICT Infrastructure	410,400	54,000	29,600	494,000	0	494,000
	1,890,900	134,000	524,000	2,548,900	12,500	2,561,400
Disabled Facilities Grants						
Private Sector Grants	1,899,800	800,000	608,400	3,308,200	255,800	3,564,000
Empty Property Grants	0	0	82,300	82,300	0	82,300
	1,899,800	800,000	690,700	3,390,500	255,800	3,646,300
TOTAL	29,299,100	4,295,300	6,726,700	40,321,100	(1,950,100)	38,371,000
Capital Reserves to be released						
Crematorium Infrastructure	1,775,000	0	350,000	2,125,000	0	2,125,000
Carlisle Southern Link Road	5,000,000	0	0	5,000,000	0	5,000,000
Cemetery Infrastructure	0	0	30,000	30,000	0	30,000
	6,775,000	0	380,000	7,155,000	0	7,155,000
REVISED TOTAL	36,074,100	4,295,300	7,106,700	47,476,100	(1,950,100)	45,526,000

COMMUNITY SERVICES

Scheme	Revised Annual Budget £	Budget to date £	Expenditure to date £	Variance to date £	Details of major variance
Vehicles & Plant	1,552,200	221,700	215,103	(6,597)	Replacement of vehicles will be contained within overall annual budget.
Cemetery Infrastructure	5,700	1,427	0	(1,427)	For further improvements to Cemetery due to be carried out in 2022/23.
Civic Centre Development	0	0	10,252	10,252	Final transactions being reviewed and budget will be identified as required.
Play Area Developments	519,700	289,424	304,658	15,234	Projects progressing as planned, additional S106 monies to be released into the budget.
Sands Car Park Resurfacing	210,000	0	0	0	Resurfacing and enhancement work to the Sands car park.
Swifts Car Park Resurfacing	200,000	0	0	0	Resurfacing and enhancement work to the Swifts car park which will serve as an overflow car park for the Sands.
Bitts Park Public Realm	42,000	10,513	0	(10,513)	Externally funded project to undertake public realm improvement works at Bitts Park.
Sands Centre Redevelopment	6,691,100	2,382,633	2,382,643	10	Capital expenditure for the enhancement work to Leisure Facilities. Progress is being monitored and is currently on schedule.
Recycling Containers	57,500	14,394	22,634	8,240	Purchase of waste receptacles.
CCTV Equipment	1,900	1,900	436	(1,464)	Fully funded by S106 monies.
Grand Total	9,280,100	2,921,991	2,935,726	13,735	

CORPORATE SUPPORT

Scheme	Revised Annual Budget £	Budget to date £	Expenditure to date £	Variance to date £	Details of major variance
ICT Infrastructure	494,000	4,226	4,459	233	Part of ICT Strategy Business Case.
Grand Total	494,000	4,226	4,459	233	

ECONOMIC DEVELOPMENT

Scheme	Revised Annual Budget £	Budget to date £	Expenditure to date £	Variance to date £	Details of major variance
Towns Deal - Caldew Riverside Remediation	646,600	14,290	14,316	26	Funding received from the Town Deal Capital Accelerated Fund and presented and approved by Executive 14/12/2020.
Planning Software	150,000	0	0	0	Project yet to start.
Future High Street Fund - 6-24 Castle Street	493,800	0	0	0	Increase to capital programme approved by Council (ED22/21 20/07/21)
Future High Street Fund - Central Plaza	787,500	0	0	0	
Future High Street Fund - Market Square	1,079,100	10,036	10,000	(36)	
Future High Street Fund - Devonshire Street	240,000	0	0	0	
Future High Street Fund - Delivery Costs	179,800	20,637	20,637	0	
Affordable Homes	600,800	0	0	0	Use of Affordable Homes Commuted Sums to bring empty properties back into use approved by Executive 02/08/2021 (ED25/21)
Grand Total	4,177,600	44,963	44,953	(10)	

FINANCE AND RESOURCES

Scheme	Revised Annual Budget £	Budget to date £	Expenditure to date £	Variance to date £	Details of major variance
Financials Upgrade	43,500	0	0	0	To cover necessary improvements to the Financials System, fully funded from existing budgets.
Grand Total	43,500	0	0	0	

GOVERNANCE & REGULATORY SERVICES

Scheme	Revised Annual Budget £	Budget to date £	Expenditure to date £	Variance to date £	Details of major variance
Planned Enhancements to Council Property	457,700	9,476	9,475	(1)	Individual projects progressing as planned.
Rough Sleeping Initiative	4,800	2,067	2,067	0	Capital grant received from DLUHC for the development of the Rough Sleeping Initiative.
Gateway 44	300,000	1,341	1,341	0	Development and Improvement costs associated with the Junction 44 retail development.
Disabled Facilities Grants	3,564,000	705,978	444,817	(261,161)	Mandatory Grants. Grant work is picking up but it is still uncertain how this year's expenditure will be affected. The position is being closely monitored.
Empty Property Grants	82,300	20,600	16,905	(3,695)	Discretionary grants to assist getting empty properties back into use.
Sustainable Warmth Competition	19,955,000	0	0	0	Externally funded project by Business Energy and Industrial Strategy (BEIS) to address fuel poverty, improve energy efficiency and carbon savings and help boost local economy with energy efficiency measures across Cumbria.
Energy Monitoring System	12,000	0	0	0	To provide an Energy Management System to be installed to monitor energy usage across Council owned property.
Grand Total	24,375,800	739,462	474,605	(264,857)	

Risk	Likelihood	Impact	Mitigation
Capital projects are approved without a full appraisal of the project and associated business case.	Remote	High	Strengthen the role of Transformation Sub-Group when considering capital project appraisals, to include consideration of business cases
Full capital and revenue costs of a project not identified.	Remote	High	Capital spending must meet statutory definitions. Financial Services to regularly review spending charged to capital. Appraisals to identify revenue costs, including whole life costs to improve financial planning.
VAT partial exemption rules are not considered.	Remote	High	Reduced impact following the decision to elect to tax land and property. To be considered as part of Project Appraisals and assessed by Financial Services.
Capital projects are not monitored nor reviewed (post contract) to ensure that the original business case assumptions have been achieved	Reasonably probable	Marginal	Better project management skills (including contract monitoring) have been introduced through PRINCE 2. Project managers to take more ownership and responsibility for the delivery of projects, including post contract reviews.
Capital projects are not delivered to time and/or are delayed due to the impact of COVID-19/Brexit on the supply of contractors and materials	Reasonably Probable	High	Significant slippage in the current capital programme. Better project management skills to be introduced through PRINCE 2. Project managers to take more ownership and responsibility for the delivery of projects. The review of the capital programme currently underway will address some of these issues.
Capital projects are not delivered to budget. Major variations in spending impact on the resources of the Council. Delays and increased costs due to COVID-19/significant inflationary increases	Reasonably Probable	High	Improved capital programme monitoring through PRINCE 2 and monthly financial monitoring. Corrective action to be put in place where necessary.
Assumptions on external funding for capital projects are unrealistic	Remote	High	Potential shortfalls arising from changes to external funding have to be met from other Council resources, so assumptions need to be backed by firm offers of funding before projects are submitted for appraisal. Risk increased due to uncertainty around funding, e.g. Government grants
Spending subject to specific grant approvals e.g. housing improvement grants, disabled persons adaptations varies from budget	Remote	Marginal	Specific grants are generally cash limited so variations in projects supported by funding of this nature will be monitored closely to ensure target spend is achieved to avoid loss of grant or restrictions on subsequent years grant funding.
Shortfall in level of capital resources generated from Capital Receipts	Probable	High	Economic downturn will impact - early warning so as not to over commit capital resources.

EXCERPT FROM THE MINUTES OF THE EXECUTIVE HELD ON 30 AUGUST 2022

EX.114/22 CAPITAL BUDGET OVERVIEW & MONITORING REPORT - APRIL TO JUNE 2022

(Non Key Decision)

Portfolio Finance, Governance and Resources

Relevant Scrutiny Panel People Panel

Subject Matter

The Leader submitted report RD.32/22 providing an overview of the budgetary position of the City Council's capital programme for the period April to June 2022.

The position statement recorded that, as at the end of June 2022, expenditure of £3,459,743 had been incurred on the Council's core capital programme. When considered against the profiled budget of £3,710,642 that equated to an underspend of £250, 899. The unspent balance remaining of the revised annual budget of £38,371,000 was £34,911,257. A review of the 2022/23 capital programme would be undertaken to identify accurate project profiles for the remainder of the financial year and any potential slippage into future years.

A number of schemes were included in the capital programme for 2022/23 that required reports to be presented to the Executive for the release of funding before the project could go ahead.

The Leader Holder concluded by moving the recommendations which were duly seconded by the Economy, Enterprise and Housing Portfolio Holder.

Summary of options rejected None

DECISION

That the Executive:

- (i) noted and had commented upon the budgetary position and performance aspects of the capital programme for the period April to June 2022;
- (ii) noted adjustments to the 2022/23 capital programme as detailed in paragraph 2.1 of Report RD.32/22.

Reasons for Decision

To keep Members informed of the budgetary position of the Council's Capital Programme for the period April to June 2022.

Report to People Panel

Meeting Date: 6th October 2022
 Portfolio: Cross-cutting
 Key Decision: No
 Within Policy and Budget Framework: Yes
 Public / Private: Public

Title: Emergency Planning – Winter readiness and LGR Preparation
 Report of: Head of Policy & Communications
 Report Number: PC 25/22

Purpose / Summary:

The purpose of the report is to update the Panel on Emergency Planning, winter readiness and the related work in the LGR Programme.

Recommendations:

That the Panel are asked to note and comment on the report.

Tracking

Executive:	N/A
Scrutiny:	People Panel
Council:	N/A

1. Emergency Planning

- 1.1. The Health & Wellbeing Panel received a final report on the Covid-19 Pandemic response, marking the change in national strategy set out in the 'Living with Covid-19 Plan', in April 2022.
- 1.2. The Health Protection Tactical Oversight Group (formally the Health Protection Board) continues to meet monthly. The group manages any local outbreaks and the partnership work around the vaccination programme. The group also covers more general public health and environmental health partnership work.

Recent incidents and events

- 1.3. The following incidents and responses have taken place since the last report to a Panel:
 - Homes for Ukraine scheme March 2022
 - Industrial Premises Fire, Hespian Wood (Carlisle) 16th June 2022
 - Commonwealth Games Queen's Baton Relay Event 16th July 2022
 - Major Heat Event - High Temperatures Expected 17th - 19th July 2022
 - Death of HM Queen Elizabeth II 8th September 2022

Winter Preparedness

- 1.4. A winter preparedness campaign is run as an annually, in November, timed to coincide with national media releases and countywide communications. The 2021 Winter Ready campaign include information and support on being 'Health Ready' and 'Financially Ready'. The details of the 2021 campaign can be viewed at: [Winter Ready 2021 | Cumbria County Council](#)
- 1.5. The Met Office's next 3-month outlook for the weather will be released in early October and cover the first month (December 2022) of winter 2022/2023. The Outlook does not identify weather for a particular day or week, it is published once a month and is part of a suite of products designed for contingency planners.
- 1.6. The Outlook uses 3 categories for possible UK temperature and precipitation in the next 3 months: COOL, NEAR AVERAGE and WARM for temperature WET, NEAR AVERAGE and DRY for precipitation. The link to the 3-month outlook can be found at: <https://www.metoffice.gov.uk/services/government/contingency-planners/index>
- 1.7. Planning, exercising and training are essential for preparedness. Over the last 12 months the following work has been completed through the Local Resilience Forum:
 - Cumbria Prepared Cumbria Website in place:

<https://www.cumbriaprepared.org.uk>

- Familiarisation visits for partners to the Civic Centre, Carlisle. The LRF back-up Strategic Control Centre for major incidents.
- Exercise Watershed completed. This exercise enabled agencies to work through a flooding scenario in order to identify areas of improvement in the Multi Agency Flood Plan.
- Multi Agency Flood Plan, Part 3 (local areas). These plans have been updated with new Flood Warning Areas, and Rapid Response Catchments expanded to all very high and high risk. They have also been adapted to cover both before and after Local Government Reorganisation, including renumbering into the two unitary areas.
- Site Clearance Plan. A small Task and Finish Group is up and running to look at Capability Gap Analysis for Debris and Rubble.
- The Water Distribution and Sanitation Plan has been combined with Dry Weather to address all aspects of disruption to water supply.
- Power Disruption Plan Following Storm Arwen Debrief, discussions are ongoing regarding a plan in line with Water Disruption for Power Disruption. The Power Outage Task and Finish Group will resume meeting, discussions are ongoing regarding a plan in line with the Managing Water Disruption.
- VIPER – Vulnerability Indicators for Properties in an Emergency. The VIPER project is nearing a close with a planned launch in mid-October 2022. VIPER has been developed by Cumbria County Council Digital Design Team and used the learning from the support offered during Covid 19.

1.8. The following events are planned for:

- Flood Training Days for Autumn 2022. These are full day training opportunities for Tactical and Operational Responders, including community groups and elected members. The morning will be presentations from a range of agencies including the Environment Agency and Met Office, and the afternoon will be a table top exercise.
- Cumbria Flood and Coast Forum, 20th October 2022. The event is designed to reconnect attendees around flood and coastal risk and resilience across the county, after such a long period of us not being able to easily meet and share progress and learning.

1.9. The new flood defences for Carlisle are summarised in the slide pack included as Appendix A in this report, this is to provide the context on the built defences (Place Panel remit). Of particular interest to the Panel (And Health & Wellbeing Panel

previously) are the points made on climate change and community resilience. The key slide is presented below:

Climate change, resilience, adaptation and wider catchment

- Work in the city has sustained one of the highest Standards of Protection (SoPs) in England
- Work post Desmond has helped in the short to medium term
- Can't raise defences further and SoP will erode over time
- Infrastructure resilience (for example NR are looking at resilience of their infrastructure along the River Caldew)
- Wider catchment may be where opportunities to keep pace with climate change exist
- Adaptation of the city – do we need to move certain forms of development in the medium term?
- We will be developing the flood resilience service and would highlight the need for community emergency response groups (not something we have in Carlisle city at present)
- Our own flood warning system and associated response plans, individual community flood plans and wider resilience flood plans will need to be revisited in the light of changes brought about as new capital schemes are completed
- Climate change projections (increased projected peak flows for 2080 for the Eden catchment, an increase even relative to the previous set of projections for the 'central' estimates we used in our scheme appraisal)
- <https://eip.ceh.ac.uk/hydrology/cc-impacts/>



Community and Local Partnerships

1.10. Carlisle Community Resilience Group (CaCRG) stepped down into recovery in Autumn 2021, and a Carlisle Community Recovery Group meeting was held with representation from the four CaCRG subgroups, but hasn't since had a requirement to meet, as recovery work has continued (where needed) via the subgroups and other partnerships (Carlisle Welfare Reform Board, Communities Group, Children and Families Partnership and World Health Organisation (WHO) Carlisle Health Forum).

"Can I thank the group for their ongoing work and resilience during the pandemic and look forward to working more closely with strategic health and care partners across the city in coming months." (Carlisle Healthcare Primary Care Network).

"Thank you for your hard work during this strange year, Carlisle has been the best informed district during the pandemic thanks to you enabling organisation and individuals to take decisions quickly based on the best data available." (Pirelli)

The CaCRG group, during a workshop were asked "What are the things we want to keep moving forward into recovery". Consistent messages included "The highly efficient comms" "Communications" "Partnership working" "Regular information sharing" "Collaborative working, shared information / newsletters, etc"

As a result, regular Partnership E-bulletin communications have been shared with all partners and continue to receive good feedback.

“I think sometimes collating newsletters is a thankless job, so just wanted to say a big Thanks as I find them really useful!” [June 2022]

“Feedback regarding the Partnership E-newsletter. These are really well received by JCP managers, our employer engagement team (Jobs & Vacancies), Disability Employment Advisor and Work Coaches. Throughout Covid they were the perfect update on locality support for vulnerable clients and very much enabled us to signpost to local help. As a BAU product they remain a great summary of what’s happening in our patch. The “Cost of Living” support available to shared clients is at the top of our list of priorities particularly as 50% plus of our clients are in work while in receipt of help from JCP. It’s a great snap shot of what is happening in the community and how the change agenda will impact on our clients and services.

The Jobcentre remains a target destination for so many clients and employers and the insight the update provides allows us to sign post and link in to local support offers and it is very much appreciated. We are delighted you have managed to retain the update as BAU so thanks again for this.”

- 1.11. The Carlisle Community Resilience worker (a temporary post funded through Contain Outbreak Management Funding via Cumbria County Council’s Public Health team) and hosted by Cumbria CVS (Council for Voluntary Service), has worked with a range of community groups to develop a proposal to consolidate and strengthen community resilience activity in Carlisle.
- 1.12. Reflecting identified gaps, needs and recommendations the initial proposal is to establish a Carlisle Resilience Network, covering the urban area of Carlisle. This will bring together local community groups with an interest in emergency preparedness, supports them with resources and training, and help them connect to local statutory sector partners.
- 1.13. The Network would be supported by a part time coordinator role hosted within a local community organisation. The post or organisation will meet the needs identified in the proposal including working on the mobilisation of the other groups as required. The proposal is still being finalised and further details will be provided when completed.

1.14. A Community Celebration and Resilience Network event took place at Tullie House on 21st September. The event included the showing of ' My Story' which documents the community response during the first few weeks of the lockdown in 2020.

2. LGR related work and decisions

2.1. The baselining information for the Resilience and Emergency Planning Work Package was published in May 2022. The service option proposal for future service delivery was (to be) 'Delivered by a hosted service with an embedded intelligent client function, managed by a Service Level Agreement.' The baseline and option are available to view at:

<https://www.cumbria.gov.uk/elibrary/Content/Internet/536/6181/38360/38369/38371/38379/44748144241.pdf>

2.2. The Cumberland Council Shadow Executive will consider a paper on Hosted Services at its September meeting. In the case of Resilience and Emergency Planning the recommendation to Cumberland Council Shadow Executive is:

'Agree that in principle and subject to the negotiation of detailed individual Service specific agreements that Westmorland & Furness Council will be the host authority for:

- Emergency Planning and Resilience Service on a permanent basis (with periodic reviews)'

2.3. The detailed preparations for Day 1 are now captured in a risk register and action plan within the LGR Programme.

Contact Officers: **Steven O'Keeffe** **Ext: 7258**
 Emma Dixon
 Abigail Roberts

Appendices attached to report: The new flood defences for Carlisle slide pack.

Note: in compliance with section 100d of the Local Government Act 1972 the report has been prepared in part from the following papers:

- None

Report details

Meeting Date: 6th October 2022
 Portfolio: Culture, Heritage and Leisure
 Key Decision: No
 Policy and Budget Framework: Yes
 Public / Private: Public

Title: **CARLISLE LOCAL CYCLING AND WALKING
 INFRASTRUCTURE PLAN (LCWIP) – ONE YEAR ON.**
 Report of: Deputy Chief Executive
 Report Number: CS 30/22

Purpose / Summary:

This report presents to members an update on progress with developing and implementing the Carlisle Local Cycling and Walking Infrastructure Plan (LCWIP). The LCWIP sets out prioritised plans for the provision of enhanced cycling and walking routes in Carlisle. The plan was prepared by the County Council with support from City Council officers, Key Stakeholder groups, and has been the subject of extensive public consultation. The approved plan will be an essential requirement when the Council bids for government funding for cycling and walking improvements. The final draft of the LCWIP was approved by the County Council, Carlisle Local Committee on the 9th March 2022. A report, CS14/22, was subsequently presented to the City Council Executive on the 21st March 2022 seeking endorsement of the report. The plan was endorsed, and the County Council are subsequently taking steps to action the plan. The appendices to this report provide details of the LCWIP.

Recommendations:

It is recommended that members note the contents of this report.

Tracking

Executive:	
Scrutiny:	
Council:	

1. Background

- 1.1. This report and its appendices give details of the Carlisle Local Cycling and Walking Infrastructure Plan (LCWIP) which has been developed over the last year. The LCWIP sets out prioritised plans for the provision of enhanced cycling and walking routes in Carlisle and is an essential document to enable bids to be made for government infrastructure funds for active travel. In preparing the LCWIP the County Council fully engaged with the City Council and other key Stakeholders. There was also extensive public consultation in preparing the plan. The LCWIP was approved by the County Council Local Committee at its meeting on the 9th March 2022, the City Council Executive subsequently considered report CS 14/22 and endorsed the plan at its meeting on the 21st March 2022. Carlisle LCWIP launched on the 8 July via a press release. Material is available to access via the Cumbria Cycling and Walking website - <https://cumbria.gov.uk/planning-environment/cyclingandwalking/default.asp>.
- 1.2. The LCWIP identifies cycling and walking improvements at a local community level and is designed to facilitate a long-term approach to developing cycling and walking networks. Encouraging people to adopt a more active lifestyle will benefit their health, but collectively this will have a positive impact on net zero carbon emissions.
- 1.3. The focus of the LCWIP is the improvement of routes used for everyday shorter journeys, such as to work, school, or the shops. It aims to identify good quality infrastructure that connects the places people need to get to, in a coherent, direct, safe, and attractive way. Recognising that it is not always possible to connect everywhere and that funding for delivery needs to be secured, the LCWIP aims to prioritise future investment where the most benefits can be realised. The LCWIP is not a funded plan however, having an LCWIP in place will put the Council in the best possible position to secure future funding for the delivery of improvements.
- 1.4. Levels of cycling and walking in Carlisle increased during the COVID-19 lockdown in Spring/Summer 2020. This was in part because roads were less busy and quieter, offering more desirable conditions for cycling and walking. The reduction in traffic emissions also led to improvements in air quality. As people returned back to places of work and to school, levels of cycling and walking reduced. This demonstrates that the potential for cycling, and walking exists if the right conditions are put in place.
- 1.5. An initial round of public engagement on the Carlisle LCWIP was undertaken in May 2021, asking for feedback on what would encourage people to change to cycling and walking for short journeys. Findings were consistent with national data whereby, a large proportion (58%) of respondents identified they currently make journeys by car to places that were within cycling and walking distance. Journeys to the shops and commuting to work were the main reasons given. Public and stakeholder engagement has played a key part in the development of the Carlisle LCWIP and a further public

consultation followed in November 2021. In addition, regular workshops have been undertaken with key stakeholders throughout to ensure a wide range of views were considered.

1.6. The results of the consultation exercises demonstrated a strong desire for future investment in cycling and walking infrastructure. Responses emphasised the importance of providing safe, segregated routes that provide direct connections to the places people want to get to. The need to provide routes that were separated from other modes of travel was a common theme in the responses and was identified as a key measure for encouraging more cycling and walking. The creation of more traffic free neighbourhoods and lower speed limits were also supported. The main perceived barriers to cycling and walking were:

- Busy roads
- Poor quality of routes
- Feeling unsafe
- Junctions that are difficult to cross

The draft priority cycling and walking networks presented during consultation received a high level of support and the majority of respondents felt the proposals would encourage them to cycle or walk more often.

2. The Local Cycling and Walking Infrastructure Plan

2.1 The LCWIP is divided into separate sections for Cycling and Walking, the contents of the plan are briefly outlined below. More specific details are given on the various plans and documents which are attached as appendices to this report.

2.2 The LCWIP provides:

- Plans of the proposed priority networks showing the most important routes and zones for further development, targeting short journeys (to school, work etc).
- A prioritised programme of infrastructure improvements for future development.
- A report setting out the evidence and work completed to support the development of the Plan.
- A basis for securing government funding or developer contributions.

2.3 The LCWIP will not provide:

Exact details of the improvements on each route (these details will be developed as funding comes forward and will be subject to further consultation).

Specific timeframes for when routes will be delivered, this will depend on funding and other issues.

Guaranteed funding for delivery, although it will put us in the best possible position to bid to secure funding.

Network planning for long distance routes such as the Hadrian's Wall Cycling and Walking Project.

2.4 The study area for the Carlisle LCWIP is based on the district boundary, however the main focus is on the urban area of Carlisle where there is the greatest potential to get more people cycling and walking for short journeys. Connections to nearby communities have also been considered as part of the development of the Plan.

2.5 **Delivery of cycling and walking improvements.**

Delivery of the specific elements of the LCWIP is subject to securing funding. Some funding has already been secured for delivery of the LCWIP and we are exploring other opportunities such as government funding for active travel and place-based investment. In Carlisle this includes provision as part of the Carlisle Southern Link Road (CSLR) by Spring 2024.

2.6 **Cycling Network.**

The Priority Cycling Network, which is detailed in the attached documents, reflects the importance of connectivity across the city to increase active travel and reduce car journeys. Key aspects of the network include:

- Carlisle Station as a central cycle hub with the provision of a new cycle parking facility.
- Links to and within the education cluster incorporating Carlisle College and several secondary schools.
- Access to key employment sites, including the Cumberland Infirmary, Kingmoor Park/Kingstown, and the city centre.
- Connectivity to and from St Cuthbert's Garden Village.

Recognising that it is not possible to connect everywhere, the LCWIP focuses on the most important routes to secure funding for. Support for walking and cycling infrastructure usually increases further once it is built and people are using it. Over time these priorities can be built on to deliver a more extensive network to encourage and support a step change in the numbers of people cycling and walking.

2.7 **Walking Network.**

As part of the LCWIP, it identifies Core Walking Zones across the study area, along with primary and secondary routes linking into those Core Walking Zones.

- Core Walking Zones are areas with the highest potential for footfall such as town centres and employment sites.
- Primary routes are those routes that are generally the most direct and have the highest usage.
- Secondary routes are alternative routes that are generally less direct but quieter

The LCWIP identifies potential improvements within the Core Walking Zones and along the primary routes which could include new or enhanced road crossings; better quality public spaces and paths; and the provision of dedicated and separated space for walkers.

Improvements have been identified for the Carlisle City Centre Walking Zone (CWZ1) and connecting primary routes.

2.8 Prioritisation

In developing the LCWIP, government guidance setting out a recommended approach to prioritising networks of walking and cycling routes, has been followed. The guidance recommends that priority should be given to areas which have the greatest potential for growing cycling and walking trips and offer the greatest value for money.

The delivery of all improvements identified in the Carlisle LCWIP is subject to securing funding. Routes for delivery have been prioritised using a framework that assesses:

- Effectiveness – the potential to generate cycling trips
- Alignment with policy objectives – such as those in the CTIP
- Economic factors – scheme cost, value for money and likelihood of attracting funding
- Deliverability – engineering constraints, land ownership and stakeholder support.

2.9 The Carlisle LCWIP provides a prioritised investment plan for cycling and walking in Carlisle District over the next 15 years. The LCWIP considers the overlaps and synergies with other plans, schemes, and strategies. This means the network priorities will be reviewed and updated periodically, particularly if there are any significant changes in local circumstances, such as the publication of new policies or strategies, new development sites, if funding bids are successful and as walking and cycling networks mature and expand. The LCWIP for Carlisle is a live document that will be regularly reviewed to ensure the most appropriate routes for cycling and walking are identified and prioritised for future delivery. The document will be used to assist in securing funding for the delivery of the identified improvements.

3 LCWIP Scheme Development, Delivery and Funding

3.1 Scheme Development

- Cumbria County Council (CCC) received 80 hours from Sustrans to develop a route layout and options appraisal report, for a traffic-free corridor linking future SCGV residential developments on the south side of the city to Carlisle City Centre, providing an alternative route (Routes 4 and 21 on CC Carlisle LCWIP Cycling Network Plan) to the heavily trafficked and constrained London Road (Route 28).
- CCC received revenue funding through DfT's Capability Fund last year and are using the money to develop LCWIP priority schemes that have the potential for funding through DfT (ATE), up to a concept level of design, four of these schemes are from the Carlisle LCWIP including:
 - Route 13: Belle Vue to Engine Lonning
 - Route 18: Warwick Road – Lismore Street to Carlisle Railway Station
 - Route 24: Education Cluster Connection from London Road
 - Route 38: A689 / Kingsmoor Roundabout to Cargo
 -
- CCC are in the process of procuring a further commission for consultants to again develop schemes that have the potential for capital funding for delivery through the

DfT (ATE). The tender evaluation has been completed and the commission will aim to start in late September/early October and will run for 12 months. This commission will include a number of routes emerging from the LCWIP totalling nearly 23km of improvements

3.2 LCWIP delivery and funding opportunities

- There will be an opportunity to bid for Active Travel Fund 4 (ATF4) capital funding later in the year, this will be a for a multi-year 3-year settlement, bids to be submitted by 23 December.
- Currently in the process of shortlisting schemes (from LCWIP) to take forward to bid for funding. The list of potential schemes will then be reviewed with Members at the end of September.

3.3 Active Travel Social Prescribing Pilot

- Following a successful application, Cumbria County Council were awarded funding by the Department for Transport to undertake a feasibility study to inform the development of a Project Plan and to make the case for funding to deliver an Active Travel Social Prescribing Pilot (ATSP) in Carlisle and Barrow-in-Furness. The Feasibility study was submitted in April 2022.
- Following the feasibility study, it has been announced that Cumbria County Council is to be awarded the full revenue grant amounting to £1,496,432 and will be one of just 11 areas across England to be part of the £12.7m Active Travel Social Prescribing Pilot Delivery phase covering the period 2022 to 2025.

The funding delivery stage could be used to:

- Establish a series of Active Travel Events - educating a wider audience on ways to get more active.
- Create opportunities for engaging with e-bikes and adaptable bikes.
- Recruit Lead and Support Officers to manage the programme.
- Implement hire and loan cycle schemes in Carlisle and Barrow.
- Raise awareness with existing providers of their ongoing operations, and repurposing of unwanted/abandoned cycles.
- Enhance cycle parking in places like leisure centres, retail outlets, central hubs, health settings, and schools.
- Establish a central digital information platform, signposting referrals and visitors to existing partners' wide range of services.

4 Risks

- 4.1 There are no obvious risk with the plan. The plan should enable bids to be made for government funding for infrastructure and Active travel improvements.

5 Consultation

- 5.1 Public Consultation took place in May 2021 and November 2021. Regular Workshops have also been held with Key Stakeholders to ensure that the plan has considered the views of the potential users of the proposed networks.

6 Conclusion and reasons for recommendations

6.1 The government has indicated that bids for improved cycling and walking infrastructure will only be considered if a local cycling and walking infrastructure plan is in place. The Carlisle plan lists a large number of potential schemes which have been ranked in priority order based on a range of criteria.

7 Contribution to the Carlisle Plan Priorities

7.1 The LCWIP is intended to assist with promoting Active Travel and all the health benefits which are associated with this. In this respect it should greatly assist in achieving the Carlisle Plan Priorities.

Contact details:

Contact Officer: Keith Poole

Ext: 7451

Appendices attached to report:

- Appendix 1 – Carlisle LCWIP Document
- Appendix 2 – Carlisle LCWIP Cycling Network Plan
- Appendix 3 – Carlisle LCWIP Prioritised Cycling Network Plan
- Appendix 4 – Carlisle LCWIP Walking Network

Note: in compliance with section 100d of the Local Government Act 1972 the report has been prepared in part from the following papers:

- None

Corporate Implications:

Legal -

Property Services -

Finance -

Equality -

Information Governance-

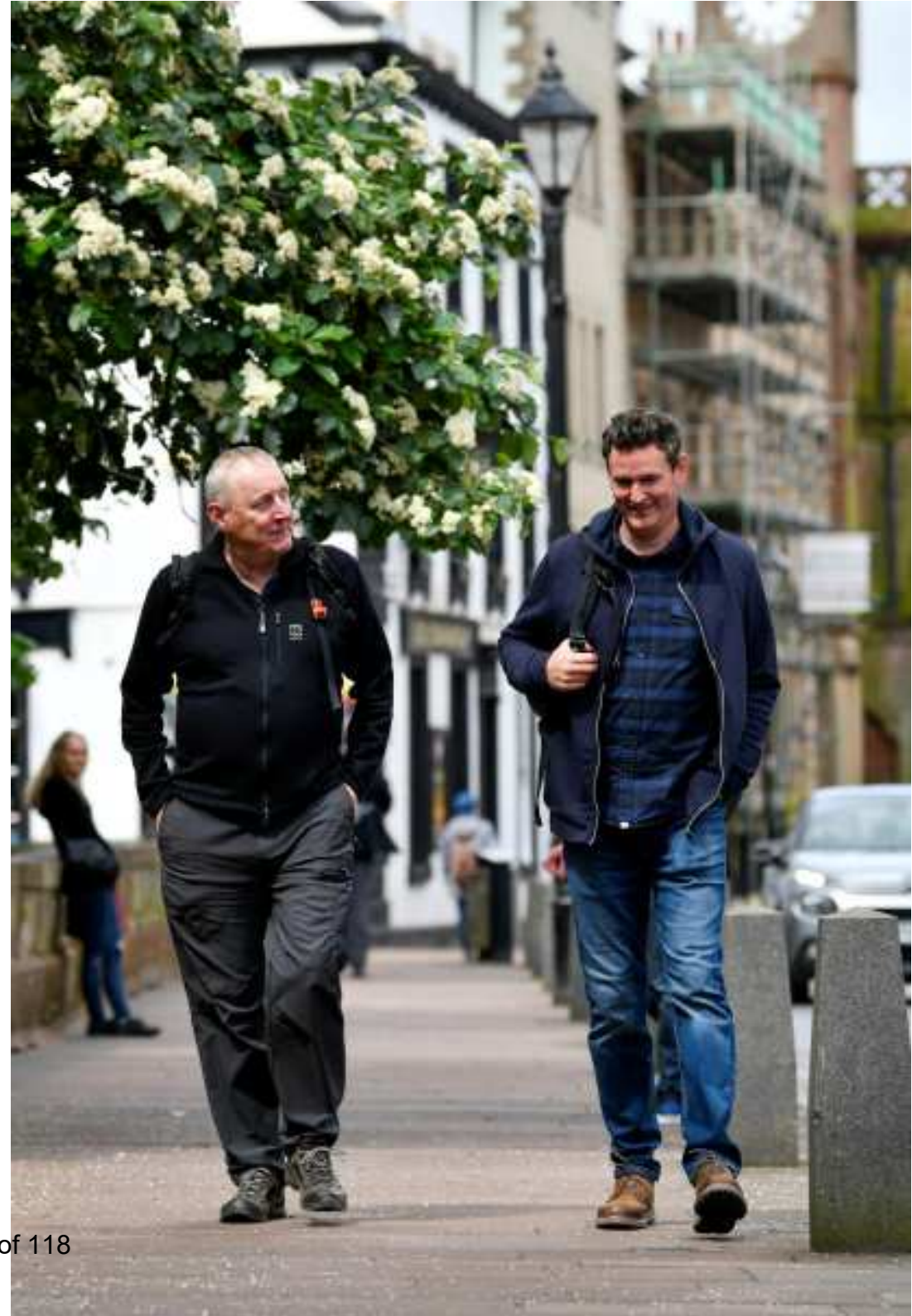
March 2022

**Carlisle
Local Cycling
and Walking
Infrastructure Plan
(LCWIP)
2022 - 2037**



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Foreword

I am pleased to introduce Cumbria County Council's Local Cycling and Walking Infrastructure Plan (LCWIP) for Carlisle, which outlines the proposed network of key cycling and walking routes in the district. The plan will work in conjunction with our wider infrastructure plans, including the Cumbria Transport Infrastructure Plan to support transport and connectivity, which will help Cumbria to become one of the best-connected rural geographies in the UK, whilst also incorporating the growth of Cumbria and responding to climate change.

The LCWIP identifies cycling and walking improvements at a local community level and is designed to facilitate a long-term approach to developing cycling and walking networks. Encouraging people to adopt a more active lifestyle will benefit their health, but collectively this will have a positive impact on net zero carbon emissions.

This document gives a summary of the county council's goals and objectives, while sharing more specific information about the communities that we have consulted with in Carlisle.

I'd like to thank all the residents, businesses, and visitors for their support and feedback on engagement and consultations to date.



Cllr Keith Little
Cumbria County Council Cabinet Member for
Highways and Transport



Cllr Cyril Weber
Cumbria County Council Chair of Carlisle Local
Committee

It is a privilege to live in this part of the country with such stunning scenery right on our doorsteps. Our aim is to encourage more people to take up walking and cycling within our city, towns, and villages, to improve connectivity between these communities, and to improve access to the greater countryside, whilst mitigating the adverse impacts of climate change.

Additionally, we should not underestimate the role active travel will play in supporting the recovery of the economy. Through better connections and travel options, people will have access to education, training, and employment opportunities, which will contribute to a healthy, more reliable workforce.

I'm delighted with the progress that has been made through the Carlisle LCWIP so far and I would like to acknowledge the efforts of all who have taken the time to share their views and opinions.

Vision and aim

What is a Local Cycling and Walking Infrastructure Plan?

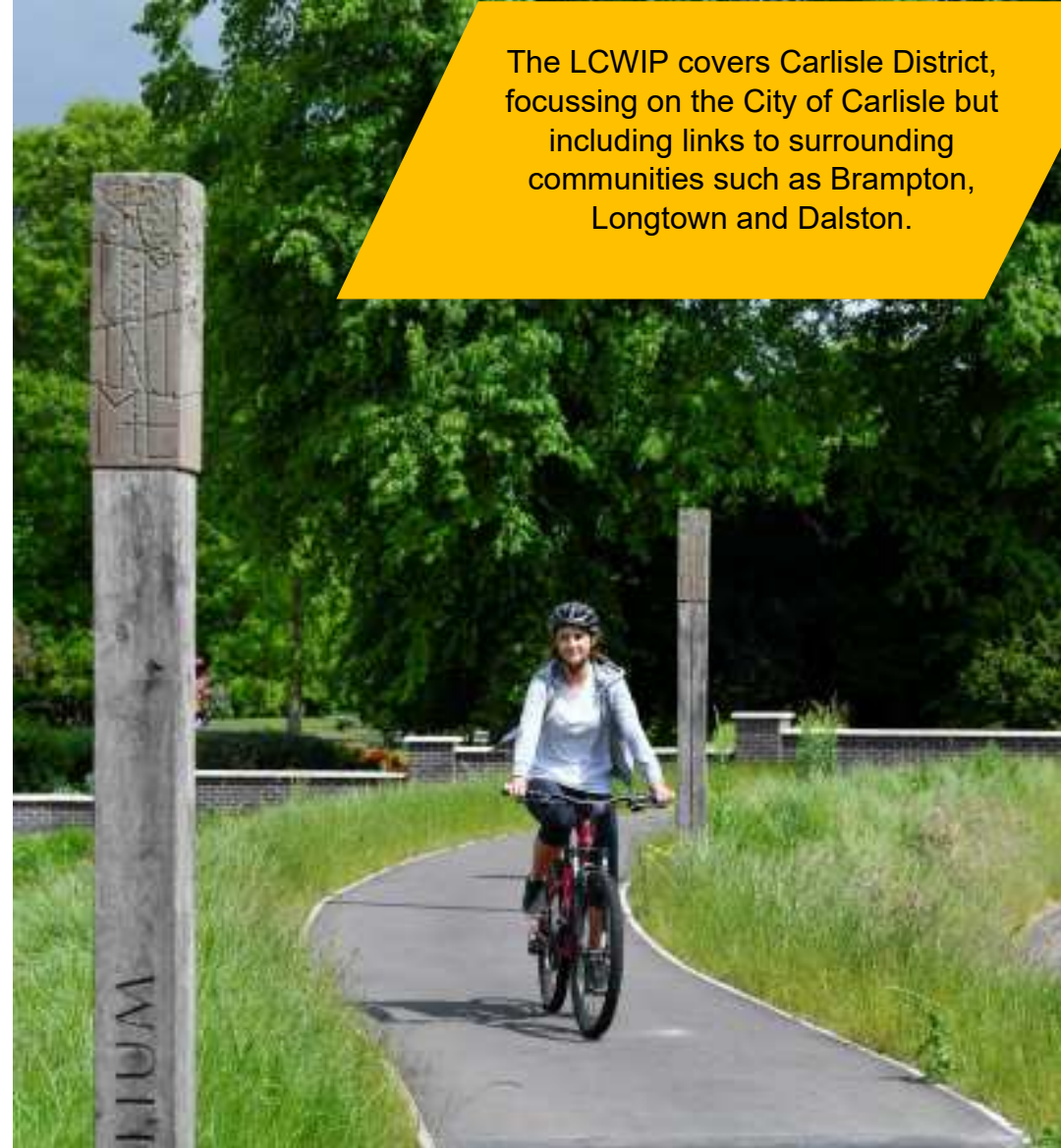
A **Local Cycling and Walking Infrastructure Plan (LCWIP)** is a document that identifies and prioritises cycling and walking improvements at a local level. It sets out an approach for developing prioritised routes over the period of the Plan (2022-2037), with the aim of **encouraging more people to make journeys on foot or by bike.**

The focus of the LCWIP is the improvement of routes used for **everyday shorter journeys**, such as to work, school or the shops. It aims to identify good quality infrastructure that connects the places people need to get to, in a coherent, direct, safe and attractive way. Recognising that it is not always possible to connect everywhere and that funding for delivery needs to be secured, the LCWIP aims to prioritise future investment where the most benefits can be realised. The LCWIP is not a funded plan. However, having an LCWIP in place will put the Council in the best possible position to secure future funding for the delivery of improvements.

The LCWIP has been developed using principles set out in the Government's first Cycling and Walking Investment Strategy, 2017. This Strategy sets out the ambition **"to make walking and cycling the natural choices for shorter journeys or as part of a longer journey"**. Government guidance outlining a recommended approach for developing LCWIPs has also been followed.

The LCWIP is based on data and evidence of existing and future potential demand. It has also been guided throughout by effective engagement with partners, stakeholders and the public.

The LCWIP covers Carlisle District, focussing on the City of Carlisle but including links to surrounding communities such as Brampton, Longtown and Dalston.



The LCWIP provides:


- Plans showing the most important routes for development
 - Priorities and timescales for development
 - A detailed evidence base to support future delivery funding bids
- on a basis for securing government funding or developer contributions

Why is an LCWIP important for Carlisle?

Creating attractive places to live and work

Carlisle is the county’s largest urban area. Many people live and work within a distance that can be undertaken on foot or by bike. Investment in the streets where people live or work could create more attractive and desirable places, particularly where the investment promotes sustainable modes of travel. Significant future development is planned for Carlisle with new communities and supporting infrastructure including, district and local centres, schools and strategic green infrastructure, delivered through the St Cuthbert’s Garden Village. There is an opportunity to create an exemplar development for active travel where streets are attractive places to be in, not just to move along. The LCWIP for Carlisle will build on the plans for St Cuthbert’s Garden Village, providing connections to and from the wider Carlisle area.

Responding to the climate crisis






Transport accounts for **27%** of the UKs greenhouse gas emissions – **61%** of this is from cars and taxis

(DTT Transport Statistics for Great Britain 2021)


Cumbria has set itself an ambitious challenge to be the first carbon-neutral county in the UK by 2037 (Cumbria Zero Carbon Partnership, 2021). De-carbonising transport is key to achieving this goal. Cycling and walking has a much lower carbon footprint compared to other forms of transport and undertaking more journeys on foot or by bike will help to tackle climate change. The LCWIP for Carlisle focusses on everyday short journeys such as those to work, school and the shops, where there is the greatest potential for change.

Supporting health, wellbeing and access for all

Active travel can play a crucial role in supporting public health and wellbeing. It is one of the simplest and most effective ways of enabling adults and children to meet the recommended levels of physical activity. The LCWIP for Carlisle has an important role to play in promoting behavioural change. By setting out well planned networks that connect people to the places they want to go and focussing on inclusive design that ensures access for all, the LCWIP presents a real opportunity for behavioural change that will last for generations to come.

 <p>27.8% of people in Carlisle (16+) are inactive</p> <p><small>Compared to 27.5% in England (Active Lives Survey 10, 2021)</small></p>	 <p>1.2% of adults in Carlisle cycle for travel at least 3 days per week</p> <p><small>Compared to 2.3% in England (Active Lives Survey, 2019-20)</small></p>	 <p>13.0% of adults in Carlisle walk for travel at least 3 days per week</p> <p><small>Compared to 15.1% in England (Active Lives Survey, 2019-20)</small></p>
<p>The health cost of inactivity to Carlisle is £1,900,000 every year</p> <p><small>(Sport England Local Sport Profiles)</small></p>		

Improving accessibility and social inclusion



25% of households in Carlisle are **without access** to a car or van

Compared to 26% in England and Wales (Census 2011)

Households who struggle to access employment and education opportunities, key services and facilities due to transport poverty can suffer from social exclusion. Cycling and walking are generally affordable modes of transport, accessible to most people. Enabling people to walk or cycle to the places they want to travel to can facilitate social inclusion. The LCWIP for Carlisle aims to connect people to jobs, education and each other, which is especially important when other modes of transport are not available.

Improving the tourism offer

Cumbria is well known for the fantastic leisure cycling and walking opportunities that the landscape offers, and Carlisle is a key gateway for visitors to the area. The Carlisle LCWIP integrates with existing longer distance leisure routes, such as the Hadrian's Wall National Cycle Network Route (NCN72). It also provides connections from the transport hubs to several key tourist destinations within the city such as Tullie House, Carlisle Castle and Carlisle Cathedral.



Existing Context

National policy context

Gear Change: A bold vision for cycling and walking (DfT, 2020) ^[1]

Sets out the governments vision for the delivery of far higher quality cycling infrastructure. Accompanied by Local Transport Note 1/20 with new ambitious cycle design standards.

Cycling and Walking Investment Strategy (DfT, 2017) ^[2]

Aims to make active modes of transport the natural choice by 2040. Sets out the need for LCWIP to inform locally targeted investments.

Future of Mobility: Urban Strategy (DfT, 2019) ^[3]

Includes the principle that ‘walking, cycling and active travel must remain the best option for short urban journeys’.

Clean Air Strategy (DEFRA, 2019) ^[4]

A change to more sustainable modes of transport is key to delivering a reduction in emissions.

Decarbonising Transport: A Better, Greener Britain (DfT, 2021) ^[5]

Sets out the government’s commitments and actions needed to decarbonise the UK’s transport system.

Key Local Policy documents include:

- Cumbria Transport Infrastructure Plan, 2022-2037 ^[8]
- Cumbria Local Industrial Strategy, 2019 ^[10]
- Cumbria Cycling Strategy, 2017-2022 ^[11]
- Carlisle District Local Plan, 2015-2030 ^[9]
- Economic Recovery Plan, 2020 ^[12]
- Destination Borderlands and the Borderlands Growth Deal, 2021-2031 ^[13]
- Cumbria Rural and Visitor Economy Growth Plan, 2017 ^[14]

National and local policy has guided and shaped the development of the Carlisle LCWIP. The Plan supports key environmental, health, social, economic and sustainable mobility goals to better connect **people** and **places**.

UK Net Zero Target (2020) ^[6]

National target to bring all greenhouse gas emissions to net zero by 2050

Inclusive Transport Strategy (DfT, 2019) ^[7]

A need for inclusive infrastructure with streetscapes designed to meet the needs of all travellers.

Local policy context

There are strong levels of support for cycling and walking in existing local policy.

The **Cumbria Transport Infrastructure Plan (CTIP)**^[8] recognises the role that active travel schemes can play in improving health, access to education, employment and services and supporting the local economy. The CTIP places active travel centrally in the aim to develop a ‘Clean and Healthy Cumbria’.

The **Carlisle District Local Plan, 2015-2030**^[9] cites cycling and walking as key mechanisms to achieve the goals outlined in several policies including:

- Policy IP2 – Transport and Development
- Policy SP5 – Strategic Connectivity
- Policy SP9 – Health and Thriving Communities

The Local Plan also sets out a number of housing and employment growth areas in Carlisle which need to be considered when developing the active travel network. These include St Cuthbert’s Garden Village, redevelopment of Carlisle Station and Citadels and employment development within Kingmoor Park Enterprise Zone.

Carlisle is benefiting from significant investment across several transport and placemaking schemes. These schemes aim to improve the district's offer as an attractive place to live, work, study, visit and invest. They also feature improvements to connectivity by sustainable and active modes of travel.

Town Investment Plan

- Carlisle has been awarded £19.7m from the Towns Fund – part of government's plan for levelling up the UK economy.
- The Town Deal will support a number of projects including sustainable travel and public realm investments to better connect the Railway Station, Citadels, Devonshire Street and former Central Plaza site.
- Investment in the public realm, public transport and active travel links on English Street and Botchergate.

Carlisle Station Gateway

- £20m of funding from the Borderlands Inclusive Growth Deal has been allocated for improvements at this major gateway to the city.
- Improvements include reducing vehicle movements on Court Square, relocating carparking and enhancements to the public space. The changes will remove the pedestrian-vehicle conflict on Court Square and increase connectivity for active travel.
- Establishment of Carlisle Station as a key cycle hub within the city.

Carlisle Citadels University Campus

- £50m of funding from the Borderlands Inclusive Growth Deal has been allocated for plans to transform the Citadels Buildings into a new home for the University of Cumbria.
- Creation of high quality, accessible public spaces and public realm improvements to English Street.

Future High Streets Fund

- £9.1m has been secured for Carlisle city centre through the government's Future High Streets Fund.
- Proposals include reimagining the Market Square, with a greater space for events and improvements for pedestrians on Devonshire Street.

Carlisle Southern Link Road (CSLR)

- The CSLR will connect M6 J42 with the A595 at Newby West. A new shared-use cycling and walking path will be constructed along the entire length and will continue along the A6(N) towards Carlton.
- Four new shared use footbridges will allow pedestrians and cyclists a traffic free option of crossing of major road junctions.
- Connections to existing walking and cycling infrastructure such as the shared use path on the Carlisle Northern Development Route (CNDR), NCN Route 7 and the Cumbria Way in the Caldew valley, Dalston Road, Newbiggin Road, Durdar Road and the A6 London Road.
- Access to Stoneraise primary school from Durdar will also be improved via a new shared-use path for pedestrians and cyclists.

St Cuthbert's Garden Village

- An ambitious development project seeking to deliver around 10,000 new homes to the south of Carlisle, along with supporting employment opportunities, community facilities and a broad range of infrastructure.
- The vision is to create a series of low carbon neighbourhoods with an integrated cycling and walking network that provides excellent sustainable transport connections.
- Plans for a new 'Greenway' running through the centre of the development to connect communities and provide links to onward routes to the city centre.
- The St Cuthbert's Garden Village masterplan makes the most of Carlisle's natural assets, including the river corridors, to provide a largely off-road green network for pedestrians and cyclists.
- There is the potential to create a '20 minute neighbourhood' where people can meet their everyday needs within a short walk or cycle.

Sands Leisure Centre Improvements

- Carlisle City Council is investing £27m to extend the Sands Leisure Centre to provide a wider range of facilities for the benefit of leisure, entertainment, and health services.
- The centre is located on major vehicle, cycle and walking routes and will serve as a transport hub where facilities such as car parking, EV charge points, secure cycle parking, e-bike charging, and coach/bus parking are provided.

How do people currently make local journeys?

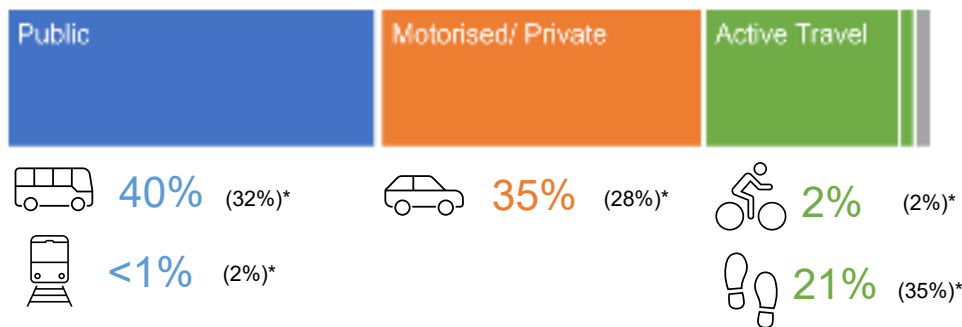
National **travel to work** data from 2011^[15] shows high levels of containment in Carlisle with almost 85% of residents also working within the district. The city centre is a key zone for employment, attracting the greatest volume of trips.

Despite short commuting distances there is a high level of car dependency with around **67%** of trips using this mode of travel. Only **3%** of journeys to work were found to be made by cycling and **20%** by walking.

Travel to school ^[16] data indicates just **21%** of children in Carlisle district walk to school, whilst **2%** cycle. Private motorised transport as a means of getting to school accounted for almost **35%** of journeys.

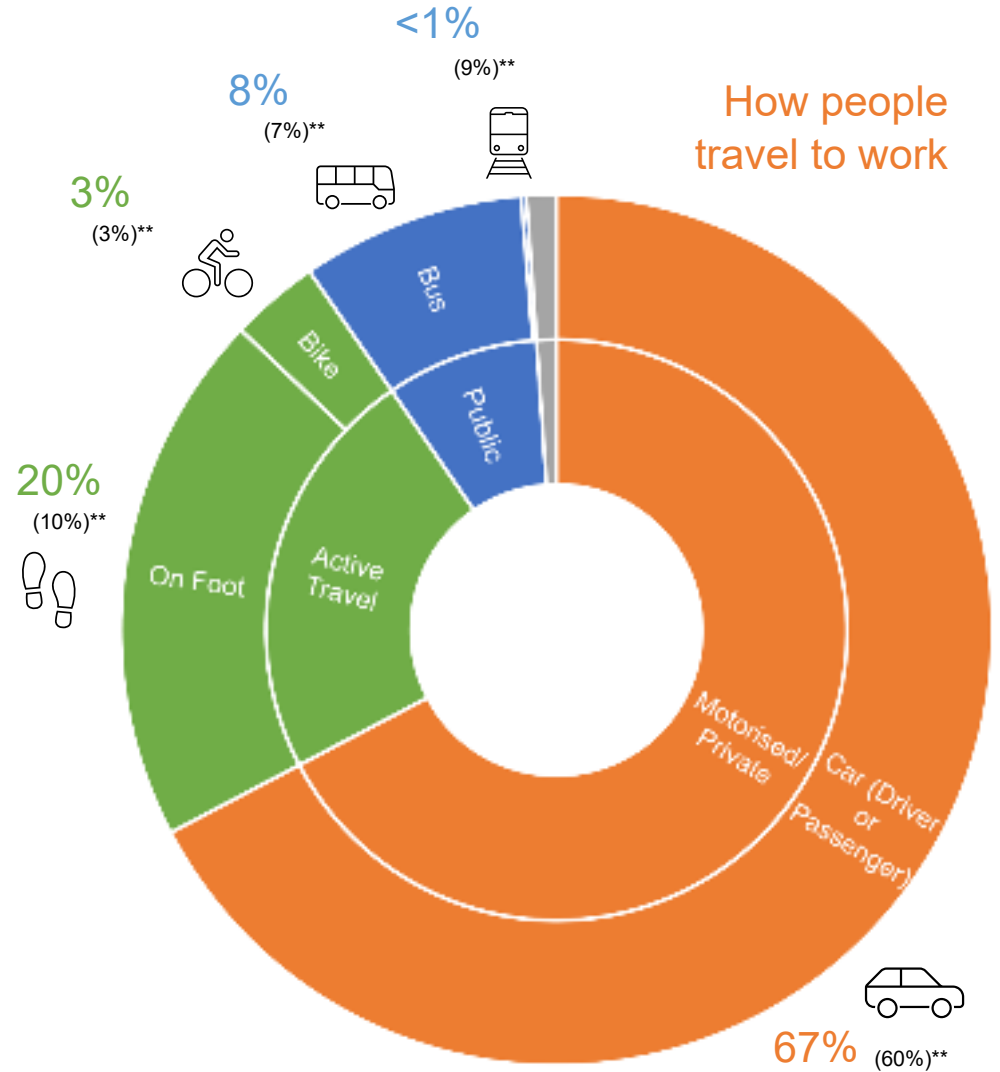
The most popular cycle routes ^[17] for both school and travel to work journeys within the district are all located within the **urban area of Carlisle**. These include the key radial routes of the A7 corridor, London Road, Warwick Road and Castle Way which converge on the city centre.

How children travel to school



Based on Carlisle District average v * County average.
Data taken from School Travel Demand Surveys 2021, providing an indication of travel modes to/from schools in Carlisle District pre-COVID. Statistics are based on 2089 respondents countywide and 473 respondents for schools in Carlisle District.

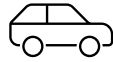
How people travel to work



Based on averages within LSOA relevant to the Carlisle LCWIP area v ** England average.
Data taken from 2001 Census. Method of Travel to Work.

Potential for more walking and cycling

98% of respondents said **improvements to cycling and walking routes** would encourage them to walk and/or cycle **more often** than they do currently.



67%
of **journeys to work** are made by private motorised transport in Carlisle LCWIP area

however..

52%
of **journeys to work** are **<5km^[18]**



25%
of **journeys to work** are **<2km^[18]**

but did you know...

Distances of **5km** can be covered in **20 minutes** by **bike**



Distances of **2km** can be covered in **25 minutes** on **foot**



Levels of cycling and walking in Carlisle increased during the COVID-19 lockdown in Spring/Summer 2020. This was in part because roads were less busy and quieter, offering more desirable conditions for cycling and walking. The reduction in traffic emissions also led to improvements in air quality. As people returned back to places of work and to school, levels of cycling and walking reduced. This demonstrates that the potential for cycling and walking exists if the right conditions are put in place. Improvements to active travel infrastructure will form part of this.

Despite high levels of car dependency across the Carlisle LCWIP area, a high proportion of everyday journeys to work, school or the shops are within a distance which is easily achievable either on bike or on foot.

An initial round of public consultation on the Carlisle LCWIP undertaken in May 2021, asked for feedback on what would encourage people to change to cycling and walking for short journeys. Findings were consistent with national data whereby, a large proportion (58%) of respondents identified they currently make journeys by car to places that were within cycling and walking distance. Journeys to the shops and commuting to work were the main reasons given.

Cycling and walking infrastructure

Developing the LCWIP

The LCWIP for Carlisle has been developed in accordance with government guidance and has followed a six stage process.

- **Stage 1: Determine the scope** – establish the geographical context and arrangements for governing and preparing the plan.
- **Stage 2: Gathering information** – identify existing walking and cycling patterns and potential new journeys. Review existing conditions and identify barriers to walking and cycling. Review related transport and land use policies and programme.
- **Stage 3: Network planning for cycling** – identify origin and destination points and cycle flows. Convert flows into a network of routes and determine the improvements required.
- **Stage 4: Network planning for walking** – identify key trip generators, core walking zones and routes, audit existing provision and determine the improvements required.
- **Stage 5: Prioritising improvements** – prioritise improvements to develop a phased programme for future investment.
- **Stage 6: Integration and application** – integrate outputs into local planning and transport policies, strategies and delivery plans.



Engagement and public consultation

Public consultation and stakeholder engagement have played a key part in the development of the Carlisle LCWIP with an initial public consultation undertaken in May 2021 and a follow up in November 2021. In addition, regular workshops have been undertaken with key stakeholders throughout.

The initial public consultation focused on gaining an understanding of:

- Current travel behaviour – cycling and walking journeys and why these are undertaken;
- Public opinion on the current active travel provision in Carlisle;
- Any barriers on active travel routes that may prevent cycling and walking;
- What would encourage modal shift to cycling or walking for short journeys; and,
- Feedback on the emerging priority cycling network.

A total of **191 responses** were received for this consultation.

The follow up consultation offered a second opportunity to comment on proposals prior to finalising the Carlisle LCWIP. This consultation focused on:

- Gauging the level of support for the draft prioritised cycling and walking network plans;
- Whether the network and interventions proposed would encourage the respondent to use active modes more often; and,
- Whether there was support for reduced space for cars to prioritise active modes.

A total of **147 responses** were received for this consultation.

The results of the consultation exercise demonstrate a **strong desire for future investment** in cycling and walking infrastructure. Responses emphasised the importance of providing **safe, segregated routes** that provide **direct connections** to the places people want to get to. The need to provide routes that were **separate from other modes of travel** was a common theme in the responses and was identified as a key measure for encouraging more cycling and walking. The creation of more **traffic free neighbourhoods** and **lower speed limits** were also supported.

The main perceived barriers to cycling and walking were:

- Busy roads
- Quality of routes
- Feeling unsafe
- Junctions that are difficult to cross

The draft priority cycling and walking networks presented received a **high level of support** and the majority of respondents felt that the proposals would encourage them to cycle or walk more often.

“Just imagine a city that prided itself on active transport, a rarity on the UK landscape... If Carlisle was a cycling city, what a selling point that would be. Cycling is an absolute no brainer.”

- a local resident, open ended question response,
November 2021

Existing cycling and walking routes

42% felt the existing cycling routes **do not** connect to the places they want to go

22% felt the existing walking routes **do not** connect to the places they want to go

Cycling and walking barriers and opportunities

68% identified **“busy roads”** as top 3 reason for why it is difficult to cycle

34% identified **“difficult junctions to cross”** as top 3 reason for why it is difficult to walk

78% identified **“cycle routes separated from other modes of travel”** as a top 3 reason for encouraging them to cycle more

61% identified **“better maintained pavements/footways”** as a top 3 reason for encouraging them to walk more

“Priority is given to cars, it would be great to give priorities to walkers and cyclists.”

- A local resident, open ended question response, May 2021

“Fantastic to see a guiding principle set out that bikes should be segregated from pedestrians and motor vehicles. This is a key reason why I don't cycle to work as it's currently dangerous.”

- A local resident, open ended question response, November 2021

Support for proposals

69% said they would support cycling and walking improvements even when this could mean less space for other road traffic

94% welcomed more money being spent on cycling and walking in Carlisle

63% strongly agreed or agreed with the routes prioritised in the draft Carlisle LCWIP cycling network

65% strongly agreed or agreed with the routes prioritised in the draft Carlisle LCWIP walking network

53% felt the proposals in the Carlisle LCWIP would encourage them to cycle or walk more often



See Carlisle LCWIP Technical Report Appendix C for copies of the Consultation Reports

Cycling infrastructure improvements

The Carlisle LCWIP broadly identifies the types of improvements that could be implemented. All improvements are subject to funding and further development.

On-Highway Fully Segregated Cycleways



Segregated cycleways offering separation from pedestrians and motor vehicles.

Photo shows a stepped cycle track.

On-Highway Lightly Segregated Cycleways



Light segregation providing a protected space.

Photo shows light segregation using 'wands'.

Off-Road Cycleways



Greenways providing rural connections. Shared use paths where pedestrian number are low.

Photo shows a greenway with segregated facilities

Upgrades to Existing Facilities



Removal of through-traffic to create Low Traffic Neighbourhoods. Slowing traffic i.e. 20mph zones.

Photo shows a Low Traffic Neighbourhood

Road Crossings and Junctions



Strong visual priority for cyclists and walkers on side junctions. Crossings and junctions offering separation and improved safety.

Photo shows a 'CYCLOPS' junction.
Page 102 of 118

Secure Cycle Parking



Short stay and long stay solutions that are secure and positioned at strategic locations.

Photo shows a secure cycle hub.

Walking infrastructure improvements

Public Realm



Enhancing the look and feel of an area through, planting, paving, seating, and street art.

Photo shows public realm improvements.

Road Crossings



Widening refuges, improving timings, signals and markings.

Photo shows an improved signalised junction .

Blended Footways



Continuing footways across junctions to enforce pedestrian priority.

Photo shows a blended footway

Wayfinding



Providing simple directional signage, larger maps or interactive screens

Photo shows information and wayfinding signage.

Maintenance

Short term maintenance to bring a route up to standard or planning for longer term maintenance.

Increased Surveillance

Improving sightlines, additional access points or installing CCTV.

Footway Widening

Proving adequate footway widths.

Speed Reduction

Through physical traffic calming measures, enforcement cameras or public realm.

Dropped Kerbs and Tactile Paving

Improving access for pedestrians with limited mobility or sight impairments.

Reduced Kerb Radii

Limiting the speed of motor vehicles at junctions to allow pedestrians to cross more safely.

Cycling network

The Priority Cycling Network reflects the importance of connectivity across the city to increase active travel and reduce car journeys. Key aspects of the network include:

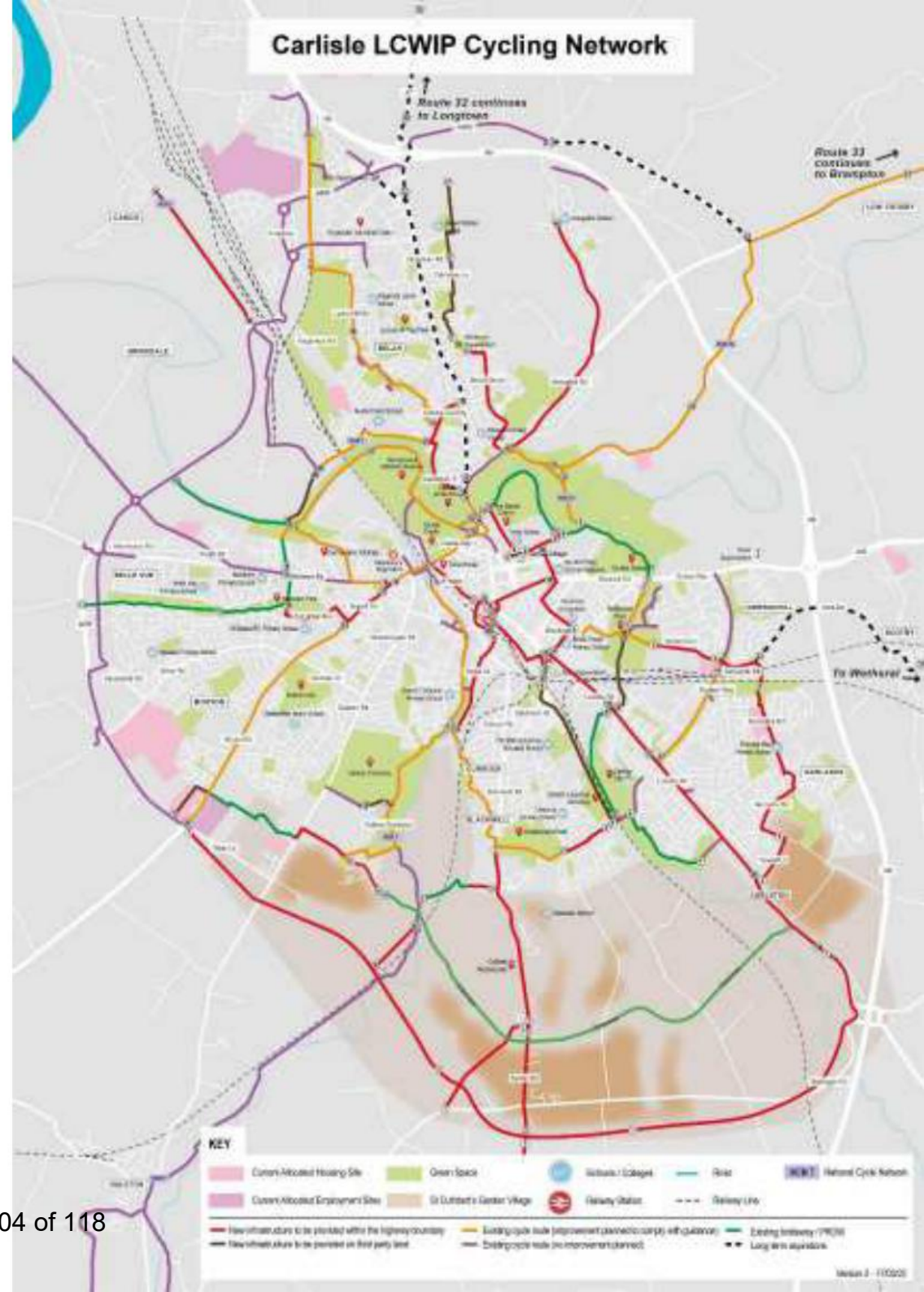
- Carlisle Station as a central cycle hub with the provision of a new cycle parking facility;
- Links to and within the education cluster incorporating Carlisle College and several secondary schools;
- Access to key employment sites, including the Cumberland Infirmary, Kingmoor Park/Kingstown and the city centre;
- Connectivity to and from St Cuthbert's Garden Village.

Recognising that it is not possible to connect everywhere, the LCWIP focuses on the most important routes to secure funding for. Support for walking and cycling infrastructure usually increases further once it is built and people are using it. Over time these priorities can be built on to deliver a more extensive network to encourage and support a step change in the numbers of people cycling and walking.

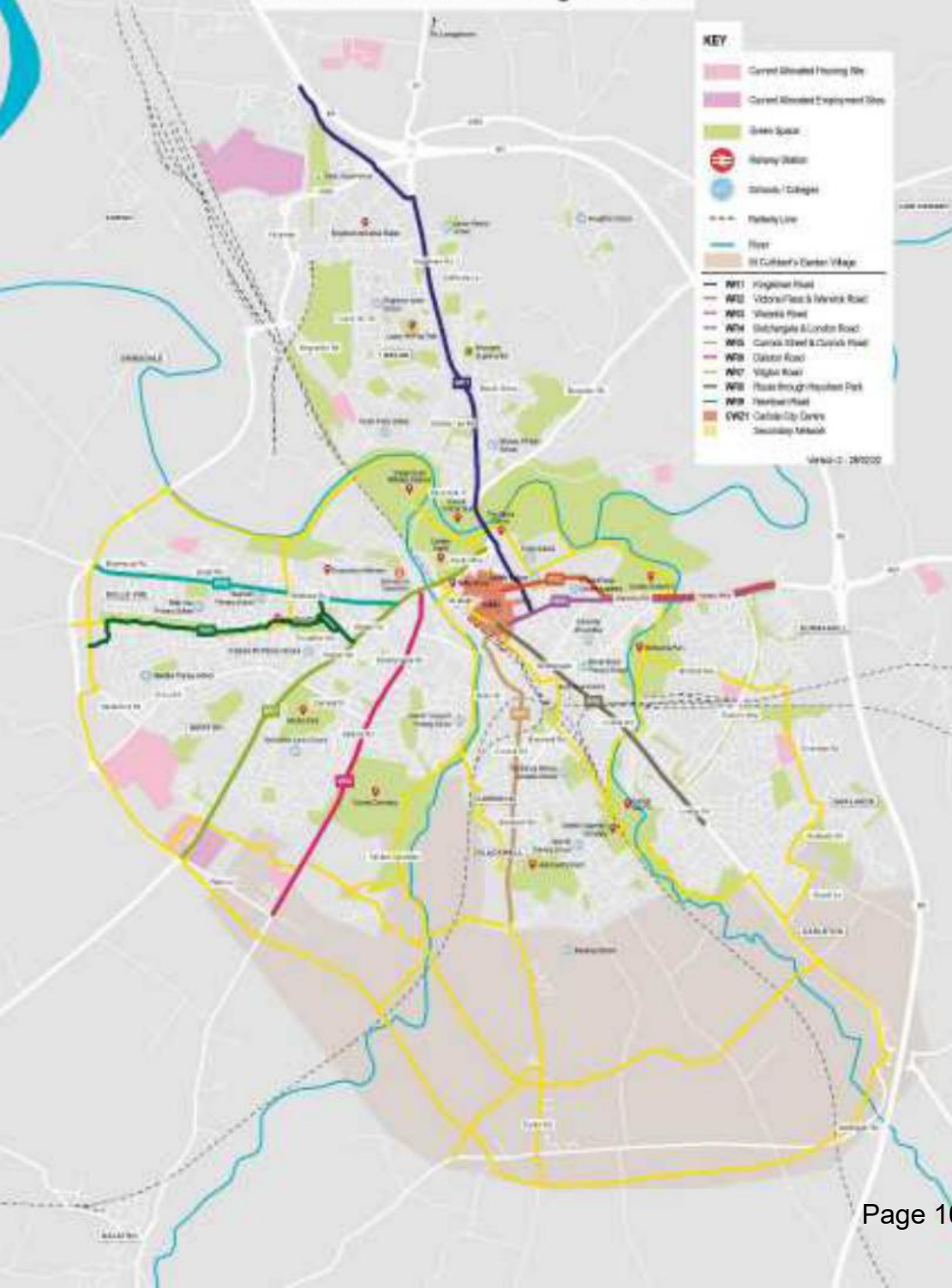


See [Cycling and Walking Webpage](#) for a copy of the Cycling Network Map

The network provides a combination of cycling infrastructure along the main routes into the city as well as alternative routes using the river corridors and quieter roads. It incorporates new cycling routes and improvements to existing routes, alongside existing provision to provide a coherent, direct, safe, comfortable, and attractive cycle network for Carlisle.



Carlisle LCWIP Walking Network



The walking network map shows Primary and Secondary routes to Carlisle City Centre Core Walking Zone. Throughout the lifespan of the LCWIP a more complete walking network will be established by identifying routes and improvements for other Core Walking Zones.

Walking network

As part of the LCWIP, we have identified Core Walking Zones across the study area, along with primary and secondary routes linking into those Core Walking Zones.

- **Core Walking Zones** are areas with the highest potential for footfall such as town centres and employment sites.
- **Primary routes** are those routes that are generally the most direct and have the highest usage.
- **Secondary routes** are alternative routes that are generally less direct but quieter

The LCWIP identifies potential improvements within the Core Walking Zones and along the primary routes which, could include: new or enhanced road crossings; better quality public spaces and paths; and the provision of dedicated and separated space for walkers.

Improvements have been identified for the Carlisle City Centre Walking Zone (CWZ1) and connecting primary routes. These are shown on the plan adjacent and further detail is provided in the full LCWIP.

Throughout the lifespan of the LCWIP, improvements will be identified for the remaining Core Walking Zones and connecting primary routes across the LCWIP area.



See [Cycling and Walking Webpage](#) for a copy of the Walking Network Map

Prioritisation

In developing the LCWIP, government guidance setting out a recommended approach to prioritising networks of walking and cycling routes, has been followed. The guidance recommends that priority should be given to areas which have the **greatest potential for increasing cycling and walking trips** and offer the **greatest value for money**.

The delivery of all improvements identified in the Carlisle LCWIP is subject to securing funding. Routes for delivery have been prioritised using a framework that assesses:

- Effectiveness – the potential to generate cycling trips
- Alignment with policy objectives – such as those in the CTIP
- Economic factors – scheme cost, value for money and likelihood of attracting funding
- Deliverability – engineering constraints, land ownership and stakeholder support

The cycling routes have been prioritised as shown on the adjacent plan. The routes have then been categorised according to the targeted timescale for delivery:

- Funded: These will be delivered in line with the timescales of the funding source
- Priority 1: Delivery within 5 years (2026/27), subject to funding
- Priority 2: Delivery within 8 years (by 2029/30), subject to funding
- Priority 3: Delivery 8 years plus (post 2029/30), subject to funding.



See [Cycling and Walking Webpage](#) for a copy of the **Prioritised Cycling Network Plan**



Conclusion and next steps

The Carlisle LCWIP provides a prioritised investment plan for cycling and walking in Carlisle District over the next 15 years.

The LCWIP takes into account the overlaps and synergies with other plans, schemes and strategies. This means the network priorities will be reviewed and updated periodically, particularly if there are any significant changes in local circumstances, such as the publication of new policies or strategies, new development sites, if funding bids are successful and as walking and cycling networks mature and expand.

The LCWIP for Carlisle is a live document that will be regularly reviewed to ensure the most appropriate routes for cycling and walking are identified and prioritised for future delivery.

The document will be used to assist in securing funding for the delivery of the identified improvements.

Further information

For further information please refer to our webpage for accompanying reports:

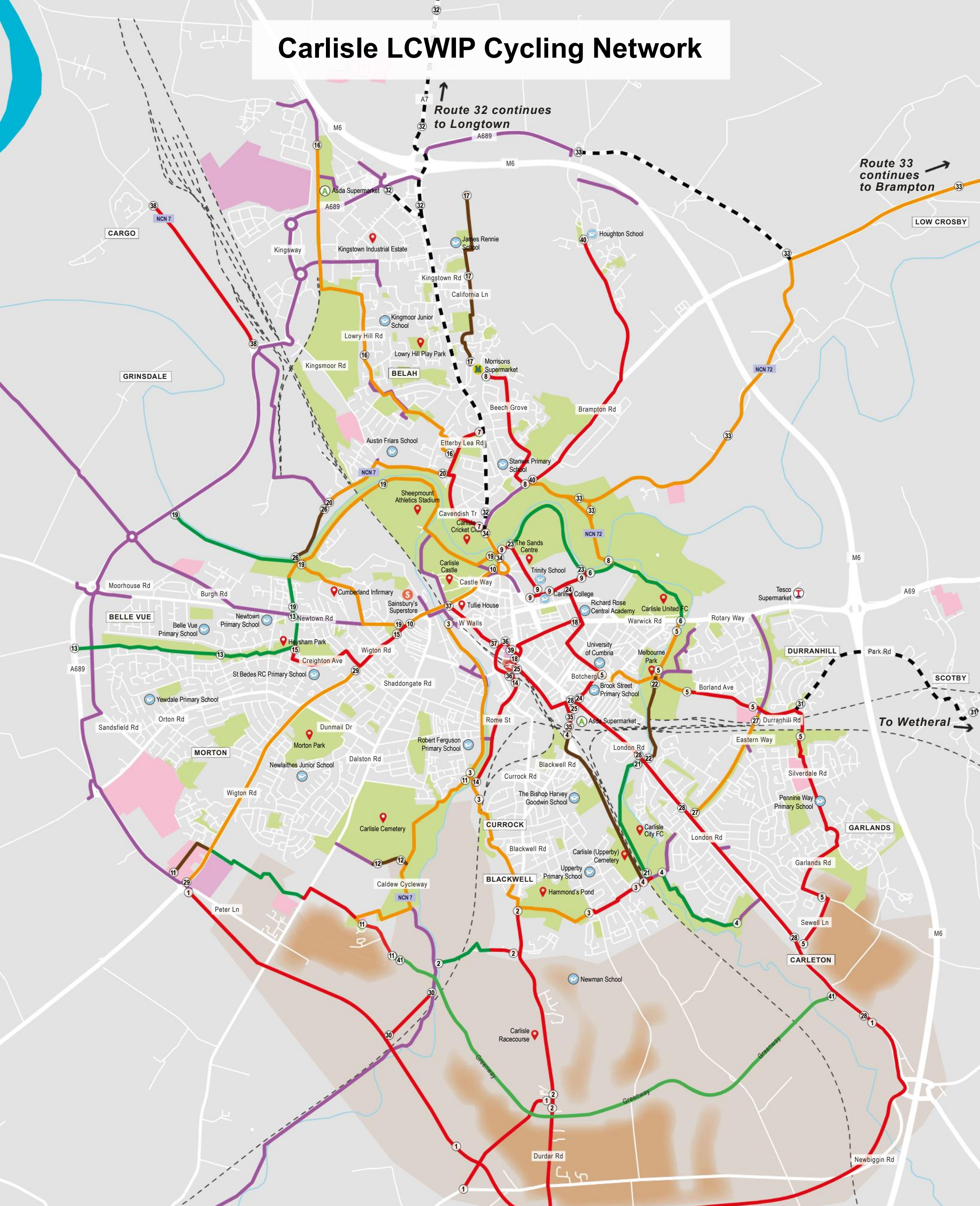
www.cumbria.gov.uk/cyclingandwalking

- Carlisle LCWIP Technical Report and Appendices
 - Appendix A – LCWIP Network Plans
 - Appendix B – Prioritised Network Plan
- Consultation Reports
- Plans
 - Cycling Network Plan
 - Walking Network Plan
 - Prioritised Cycling Network Plan

References

- [1] Gear Change: A bold vision for cycling and walking. Department for Transport (2020) <https://www.gov.uk/government/publications/cycling-and-walking-plan-for-england>
- [2] Cycling and Walking Investment Strategy. Department for Transport (2017) <https://www.gov.uk/government/publications/cycling-and-walking-investment-strategy>
- [3] Future of Mobility: Urban Strategy. Department for Transport (2019) <https://www.gov.uk/government/publications/future-of-mobility>
- [4] Clean Air Strategy. DEFRA (2019) <https://www.gov.uk/government/publications/clean-air-strategy-2019>
- [5] Decarbonising Transport: A Better, Greener Britain. Department for Transport (2021) <https://www.gov.uk/government/publications/transport-decarbonisation-plan>
- [6] UK Net Zero Target (2020) <https://www.gov.uk/government/publications/net-zero-strategy>
- [7] Inclusive Transport Strategy. Department for Transport (2019) <https://www.gov.uk/government/publications/inclusive-transport-strategy>
- [8] Cumbria Transport Infrastructure Plan. Cumbria County Council (2021) <https://www.cumbria.gov.uk/planning-environment/infrastructureplanning/strategicplans.asp>
- [9] Carlisle District Local Plan 2015-2030, Carlisle City Council (2016) <https://www.carlisle.gov.uk/planning-policy/Adopted-Plans/Carlisle-District-Local-Plan-2015-2030>
- [10] Cumbria Local Industrial Strategy, Cumbria Local Enterprise Partnership (2019) <https://www.thecumbrialep.co.uk/strategies-and-plans/>
- [11] Cumbria Cycling Strategy, Cumbria Cycling Partnership 2017-2022 <https://www.cumbria.gov.uk/planning-environment/cyclingandwalking/>
- [12] Economic Recovery Plan, 2020
- [13] Destination Borderlands and the Borderlands Growth Deal, 2021-2031
- [14] Cumbria Rural and Visitor Economy Growth Plan, Cumbria Local Enterprise Partnership 2017
- [15] National Census 2011. Dataset WU03UK (Commuting destinations). Dataset WU03EW (Internal Journeys to Work: Modal Split) data filtered to consider on trips internal to Carlisle district.
- [16] Department for Transport, 3 year averages, England 2003-2018.
- [17] Propensity to Cycle Tool: An open source online system for sustainable transport planning. Lovelace, R. et al. (2017) <https://www.pct.bike/>
- [18] National Census 2011. Dataset QS702EW (Distance travelled to work).

Carlisle LCWIP Cycling Network



Route 32 continues to Longtown

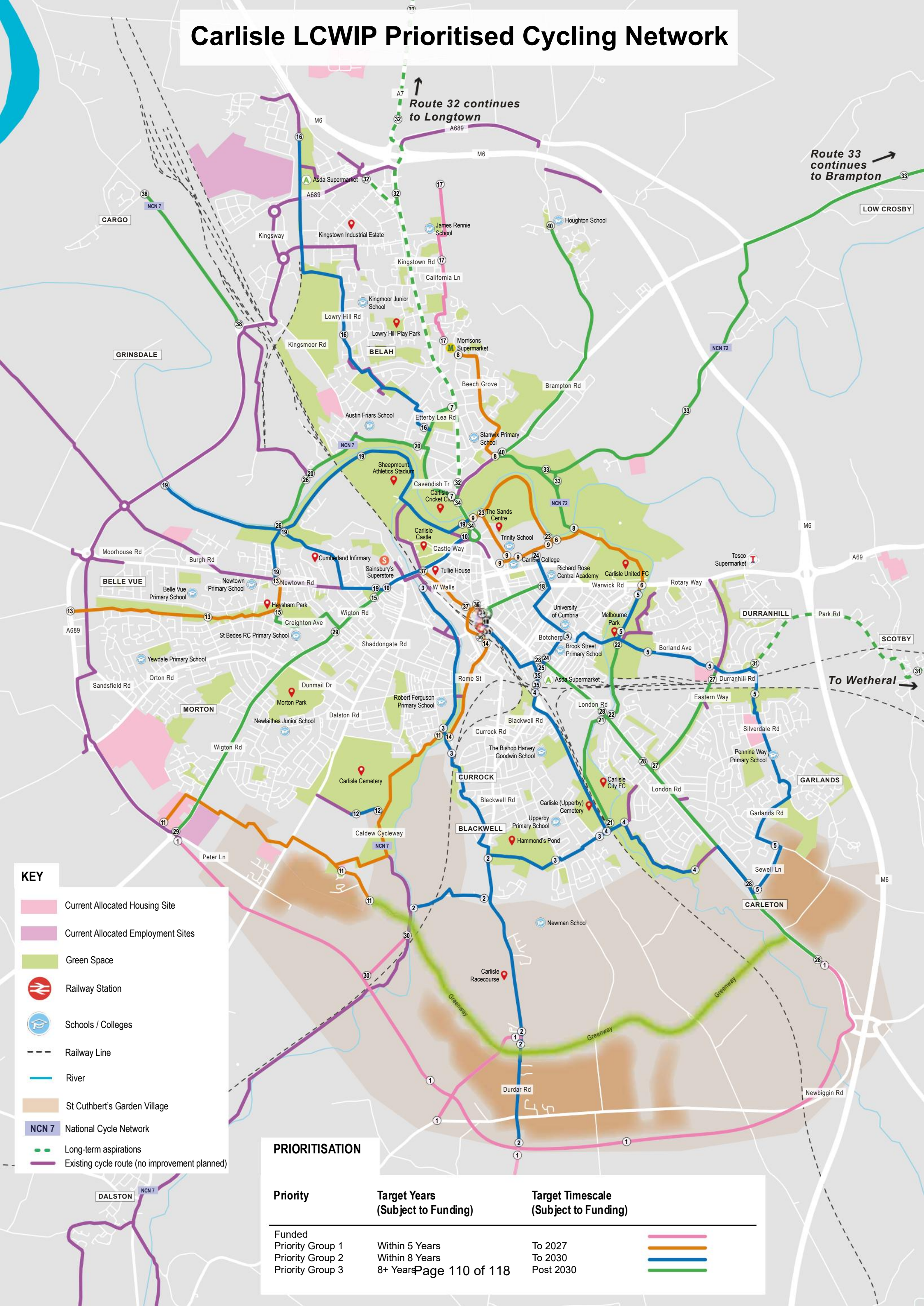
Route 33 continues to Brampton

To Wetheral

KEY

- | | | | | | | | | | |
|--|---|--|------------------------------|--|--------------------|--|---------------------------|--|------------------------------|
| | Current Allocated Housing Site | | Green Space | | Schools / Colleges | | River | | NCN 7 National Cycle Network |
| | Current Allocated Employment Sites | | St Cuthbert's Garden Village | | Railway Station | | Railway Line | | |
| | New infrastructure to be provided within the highway boundary | | | Existing cycle route (improvement planned to comply with guidance) | | | Existing bridleway / PROW | | |
| | New infrastructure to be provided on third party land | | | Existing cycle route (no improvement planned) | | | Long-term aspirations | | |

Carlisle LCWIP Prioritised Cycling Network



Route 32 continues to Longtown

Route 33 continues to Brampton

To Wetheral

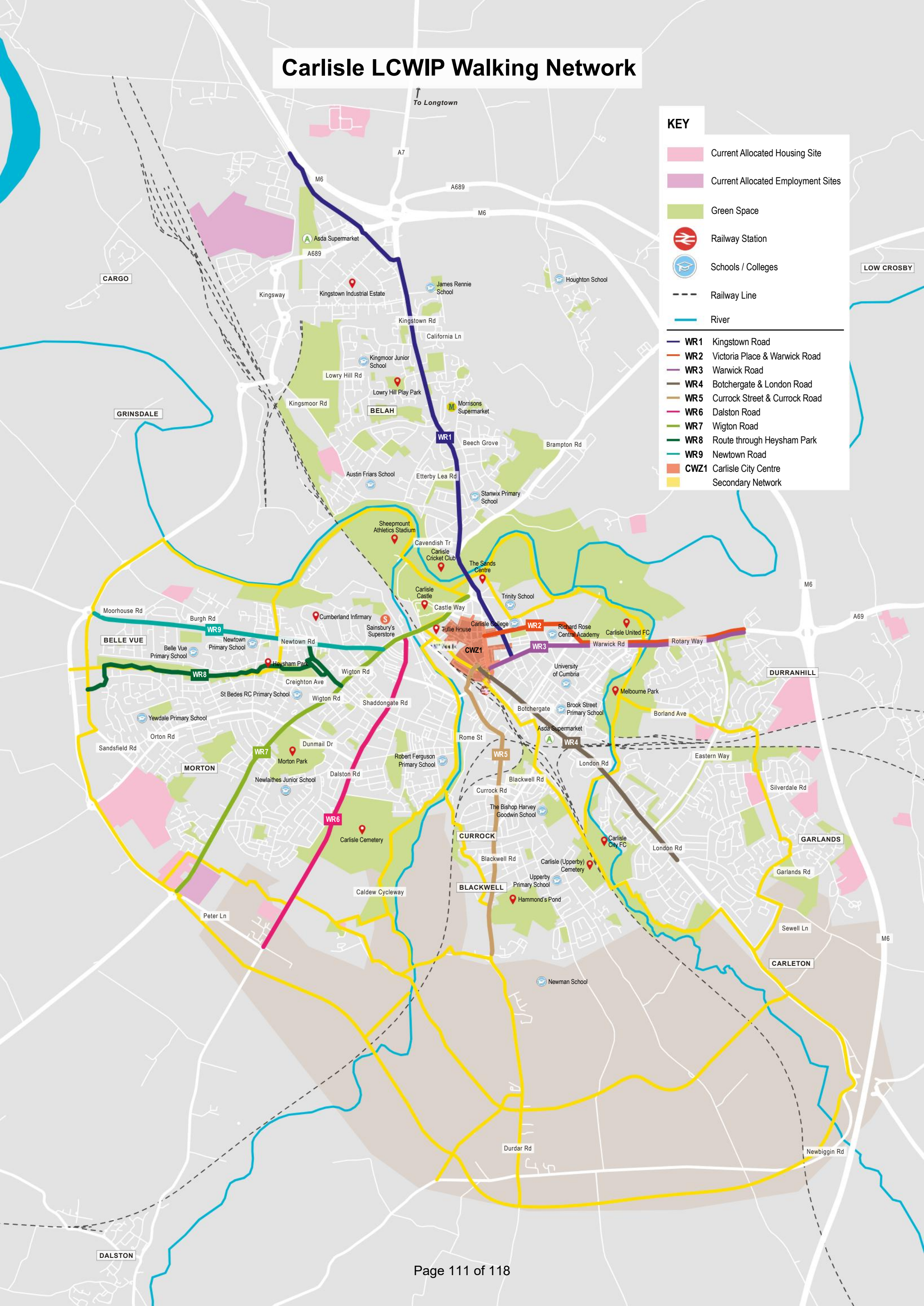
KEY

- Current Allocated Housing Site
- Current Allocated Employment Sites
- Green Space
- Railway Station
- Schools / Colleges
- Railway Line
- River
- St Cuthbert's Garden Village
- NCN 7
- Long-term aspirations
- Existing cycle route (no improvement planned)

PRIORITISATION

Priority	Target Years (Subject to Funding)	Target Timescale (Subject to Funding)	
Funded			
Priority Group 1	Within 5 Years	To 2027	
Priority Group 2	Within 8 Years	To 2030	
Priority Group 3	8+ Years	Post 2030	

Carlisle LCWIP Walking Network



KEY

- Current Allocated Housing Site
- Current Allocated Employment Sites
- Green Space
- Railway Station
- Schools / Colleges
- Railway Line
- River
- WR1 Kingstown Road
- WR2 Victoria Place & Warwick Road
- WR3 Warwick Road
- WR4 Botchergate & London Road
- WR5 Currock Street & Currock Road
- WR6 Dalston Road
- WR7 Wigton Road
- WR8 Route through Heysham Park
- WR9 Newtown Road
- CWZ1 Carlisle City Centre
- Secondary Network

Meeting Date: 06/10/2022
 Portfolio: Cross-cutting
 Key Decision:
 Policy and Budget Framework: No
 Public / Private: Public

Title: Overview Report
 Report of: Policy and Scrutiny Officer
 Report Number: OS.22/22

Purpose / Summary:

This report provides an overview of matters related to the Scrutiny Panel's work. It also includes the latest version of the work programme.

Recommendations:

Members are asked to:

- Note the items within Panel remit on the most recent Notice of Key Executive Decisions and comment on
- Note the current work programme, work planning activity and comment on the programme, in particular on items for the next Panel meeting.

Tracking

Executive:	Not applicable
Scrutiny:	People 06/10/22
Council:	Not applicable

1. Notice of Key Decisions

1.1. The most recent Notice of Key Executive Decisions was published on 26 August 2022. This was circulated to all Members and is available on the CMIS section of the Council's webpages. The following items fall within the remit of this Panel:

Items that are included in the Panel's work programme:

- None

Items that are not included in the Panel's work programme:

- None

2. References from the Executive

2.1. None

3. Progress on resolutions from previous meetings

3.1. The following table sets out the meeting date and resolution that requires following up. The status is presented as either "completed", "pending" (date expected), or "outstanding". An item is considered outstanding if no update or progress has been made after three panel meetings. All the completed actions will be removed from the list following the meeting.

	Meeting date	Minute reference	Action	Status
1	09/06/22	PEP.10/22	2) That arrangements be made for the Panel to undertake a site visit of the Sands Centre prior to the soft opening.	Pending
2	14/07/22	PEP.21/22	4) That a Cost of Living Crisis Task and Finish Group be established to investigate further the impact of the cost of living crisis and food security on residents. The Task and Finish Group would provide evidence based reports which would be submitted to the Cumberland Council.	Complete
3	14/07/22	PEP.22/22	2) That the work of the CAB and the statistical information they hold be incorporated into the work of the Cost of Living Crisis T&F Group;	Pending
4	14/07/22	PEP. 22/22	3) That the Panel asked, in light of the current cost of living crisis and the impact on demand for services, that the Executive give consideration to increasing the Carlisle City Council grant funding to the Citizens Advice Bureau.	Complete
5	14/07/22	PEP.23/22	2) That the communications channels for the support available be enhanced and promoted through local and social media;	Complete
6	14/07/22	PEP.23/22	3) That the work being undertaken by the Strategic Policy and Scrutiny Adviser be incorporated into the Cost of Living Crisis Task and Finish Group.	Pending

7	14/07/22	PEP.24/22	2) That the Healthy City Team Manager circulate a copy of the Thriving Communities Evaluation Report 2021/22 to all Members of the Panel.	Complete
8	25/08/22	PEP.33/22	1) That the Deputy Chief Executive provide a written response to the Panel setting out the costs of mothballing the Turkish Baths and confirming the current operational costs	Pending
9	25/08/22	PEP.33/22	2) That Scrutiny recommended the Council to consider a Meanwhile Tenancy.	Pending
10	25/08/22	PEP.33/22	3) That the Deputy Chief Executive provide a written response to the Panel setting out whether the Turkish Baths was included in the Council's UK Shared Prosperity Fund Investment Plan submission.	Pending
11	25/08/22	PEP.33/22	4) That the Executive were asked to convene a multi-disciplinary meeting of all parties, including the the Friends of the Carlisle Victorian and Turkish Baths to discuss the future operation of the Turkish Baths.	Pending
12	25/08/22	PEP.33/22	5) That the Panel ask the Executive to support the allocation of the £400,000 Borderlands funding to future proof the stand alone operation of the Turkish Baths.	Pending
13	25/08/22	PEP.33/22	6) That the Panel ask the Executive to liaise with the NHS to clarify its position with regard to the future use of the 10m as hydrotherapy pool, and advise The Friends of the Carlisle Victorian and Turkish Baths.	Pending
14	25/08/22	PEP.33/22	7) That the Democratic Services Officer circulate to the Panel the minutes of the meeting of the Health and Wellbeing Scrutiny Panel of 17 February 2022.	Complete
15	25/08/22	PEP.33/22	8) That a further site visit to the Turkish Baths be arranged for members of the People Panel and members of the Shadow Authority.	Pending
16	25/08/22	PEP.34/22	2) That all staff and partners be encouraged to participate in the consultation on the Cumberland Plan.	Complete
17	25/08/22	PEP.34/22	3) That an offer be made to the Shadow Authority for the People Panel to act as consultee in relation to the equalities processes for the new Cumberland Council.	Pending
18	25/08/22	PEP .35/22	3) That Officers explore if it is possible to accelerate the process for paying new benefits claims given the cost of living crisis.	Pending
19	25/08/22	PEP.36/22	2) That the Policy and Scrutiny Officer write to the Monitoring Officer requesting that the Council's Constitution be amended by removing the following items from the Place Panel remit and adding them to the People Panel remit: - Homelessness; Housing - standards and improvements; Housing advice and support	Complete

4. Update from Cost of Living Task and Finish (T&F) Group

4.1 The People Panel Cost of Living T&F has begun work. The group met on 15 September 2022 to agree Terms of Reference and Chair. A workplan was agreed, with themed sessions to consider different aspects of the cost of living crisis. The group aim to report to People Panel on 12 January 2023.

4.2 The T&F group met again on 29 September to discuss some early proposals from officers to deliver “quick wins” that could take effect this Autumn. The session focused on energy costs and keeping homes warm. The group received information from expert witnesses to assist their discussion.

5. Contribution to the Carlisle Plan Priorities

5.1. The scrutiny of Carlisle Plan items that fall within the remit of this Panel contribute to ongoing policy development.

Contact Officer: Rowan Jones

Ext: 7257

**Appendices
attached to report:**

1. Draft Scrutiny Panel Work Programme 2022-23

Note: in compliance with section 100d of the Local Government Act 1972 the report has been prepared in part from the following papers:

- None

CORPORATE IMPLICATIONS:

LEGAL –

PROPERTY SERVICES -

FINANCE –

EQUALITY – This report raises no explicit issues relating to the public sector Equality Duty

INFORMATION GOVERNANCE –

APPENDIX 1: Draft Scrutiny Panel Work Programme 2022-23

Date	Title	Lead Officer
09/06/2022	End of Year Performance Report 2021/22	Steven O'Keeffe
	Sickness Absence - end of year report 2021/22	Bibian McRoy
	Provisional Outturn Reports	Steven Tickner
	Healthy City 2022/23 programme and opportunities for broadening approach beyond 2023	Luke Leathers
	Sands Centre Redevelopment - Programme Update and plans for re-opening	Darren Crossley
14/07/2022	Business Rates Outturn 2021/22	Alison Taylor
	Thriving Communities	Jeannie Pasley
	CAB - update presentation on work and issues for local residents	Jeannie Pasley/ Andy Auld (CAB)
	Cumbria County Council Cost of Living Programme	Joel Rasbash (County Council)
	Food Security - Carlisle Foodbank	Jeannie Pasley/ Niall McNulty (Chair Carlisle Foodbank)
25/08/2022	Annual Equality Report	Steven O'Keeffe
	Carlisle Plan - delivery progress/ Performance Report Q1 2022/23	Steven O'Keeffe
	Victorian Baths	Darren Crossley/ Friends Group
	Overview Report - including updates to remit regarding housing	Rowan Jones
TBC – Sept/ Oct?	Site visit to sands centre before soft opening	Darren Crossley
06/10/2022	Budget monitoring Q1 2022/23	Steven Tickner
	Emergency Planning - winter readiness and LGR preparation	Steven O'Keeffe
	Asylum Seekers - Carlisle Refugee Action Group (CRAG) update	Rowan Jones
	Welfare Reform Board - update presentation on work and issues for local residents	Tammie Rhodes
	Local Cycling and Walking Infrastructure Plans (LCWIPs)	Darren Crossley
24/11/2022	Budget monitoring Q2 2022/23	Steven Tickner
	Performance Report Q2 2022/23	Steven O'Keeffe
	Sickness Absence - Q2 2022/23	Bibian McRoy
	Community Centre Sustainability - currently and post LGR	TBC
	Youth Projects and Engagement	
	LGR - support for staff and assurance on proposed arrangements	Bibian McRoy
12/01/2023	Corporate Projects - LGR handover	Jason Gooding
	Corporate Risk Register - LGR handover	Darren Crossley
23/02/2023	Budget monitoring Q3 2022/23	Steven Tickner
	GLL	Luke Leathers
	Scrutiny Annual Report	Rowan Jones

For information reports

Jul-22	Update on IT projects - Part B	Monitoring	D. Strong/ M. Kelly
Aug-22	Sickness Absence - Q1 2022/23	Monitoring	Bibian McRoy
Dec-22	Update on IT projects - Part B	Monitoring	D. Strong/ M.Kelly
Feb-23	Performance Report Q3 2022/23	Monitoring	Steven O'Keeffe
Feb-23	Sickness Absence - Q3 2022/23	Monitoring	Bibian McRoy